# TABLE OF CONTENTS

Executive Summary ................................i

1. Introduction .................................. 1
   1.1 Destination Management Planning ....................... 1
   1.2 Planning Process .................................. 2
   1.3 Tourism Partners .................................. 3

2. The Benefits Of Tourism .................... 7

3. Policy & Planning Framework ............ 9

4. Discover Lethbridge ....................... 13
   4.1 Destination Overview .......................... 13
   4.2 Lethbridge’s Stories–History & Culture ................ 17

5. Tourism Today: Alberta, Alberta South & Lethbridge .......... 23
   5.1 Tourism in Alberta ............................ 23
   5.2 Visitors to Southern Alberta .................. 25
   5.3 Visitors to Lethbridge ......................... 29
   5.4 Tourism Experiences & Resources ..................... 33
   5.5 Brands, Marketing & Media .................... 61

6. Destination Analysis ....................... 69
   6.1 Visitor Voice .................................. 69
   6.2 Destination Life Cycle Analysis & Market Readiness ........ 78

7. The Way Forward ......................... 81
   7.1 Vision ........................................... 81
   7.2 Outcomes ....................................... 81
   7.3 Markets of Greatest Potential .................... 82
   7.4 Destination Strategy–Primary
       Travel Motivators .................................. 102
   7.5 Unique Selling Proposition ..................... 102
   7.6 Shifting Focus–The Visitor Experience .................. 103
   7.7 Experience–Market Match & Gaps ................. 104
   7.8 Strategies, Priority Initiatives
       & Actions ....................................... 122

8. Monitoring Performance & Progress ........ 143

9. References .................................. 145

Appendix A Policy Overviews .............. A.1
   9.1 National ........................................ A.2
   9.2 Provincial ....................................... A.2
   9.3 Regional ....................................... A.4
   9.4 Local ........................................... A.6
Acknowledgements

The Lethbridge Destination Management Plan is the result of collaborative efforts by the Lethbridge City Council Tourism Strategy Committee, tourism industry and the project team from Stantec Consulting Ltd., Left Coast Insights, Twenty31, and the Tartan Group. We would like to thank everyone for their vision, excitement and commitment.

Funding was provided by Alberta Culture and Tourism, Province of Alberta,
EXECUTIVE SUMMARY

This Destination Management Plan (DMP) is an effort to galvanize the City’s tourism industry behind a shared vision of its tourism future and a strategy to reach it. It is an open invitation to the City’s tourism industry and its partners to move forward collectively and collaboratively over the next 10 years. The DMP is the outcome of a 13-month long comprehensive and collaborative planning process led by the Lethbridge City Council Tourism Strategy Committee. Hundreds of community members, tourism industry stakeholders and tourism industry partners shared in the creation of the DMP through online engagements, tourism conversations, interviews and workshops.

Destination Management Planning

Destination Management Planning is a process of leading, influencing, and coordinating the management of all aspects of a destination that contribute to a visitor’s experience, taking account of visitor needs, local residents, businesses and environment. As a comprehensive and collaborative process, it enables a destination to identify its target markets and competitive advantages, determine key tourism experiences to be offered and think about how the unique tourism resources will be managed; how the capacity of the destination will be enhanced; how effects on the destination will be understood and dealt with, and how the destination will reach out to and compel its target markets to visit.

Lethbridge City Council Tourism Strategy Committee

- Councillor Bridget Mearns, Chair
- Councillor Jeff Carlson
- Councillor Joe Mauro
- Erin Crane, Economic Development Lethbridge
- Nikolaus Wyslouzil, Chinook Country Tourist Association
- Susan Eymann, Lethbridge Sport Council
- Amanda Jensen, Lethbridge Lodging Association
- Dan Berdusco, Community Member
- David Robb, Community Member

Committee Support:

- Jody Meli, Project Sponsor, City of Lethbridge
- Lorna Kurio, Project Manager, City of Lethbridge
- Jessica Robinson, Committee Assistant, City of Lethbridge
- Laura McGowan, Alberta Culture and Tourism
- Anastasia Martin-Stilwell, Travel Alberta

Engagement by the Numbers

- **6,445** Mindmixer Page Views
- **2,502** Unique Visitors on Mindmixer
- **151** Stakeholders Invited to Participate
- **18** Interviews
- **77** Tourism Conversation Attendees
- **105** Comments Received
A City of Unique Diversity

Lethbridge, boasting a unique natural landscape of beauty and diversity, is one of the most intriguing tourism destinations in Alberta. As southern Alberta’s largest city, with access to a range of Provincial and National Parks, world-class tourism attractions, a rich history, and spectacular geography, Lethbridge is unlike any other City in the province of Alberta.

Figure ES-1. Destination Management Planning Tool (Source: World Tourism Organization, 2007)
Figure ES-2. Destination Overview

Whoop-Up Drive Bridge
Visitors to Alberta South & Lethbridge

Tourism is a critical part of Alberta’s economy. The $8 billion tourism industry supports 19,000 businesses, employs approximately 114,000 people and attracts 33 million total visits annually. In 2013, tourism contributed $2.9 billion in GDP to the province and approximately $4 billion in total tax revenue to all levels of government.29 As shown in Figure ES-3, tourism in our region benefits the entire City and region creating jobs, infrastructure, and supporting community development through direct, indirect, and induced economic benefits. Visitation to the Province has grown steadily since 2000, however; Alberta is working to grow provincial tourism revenues to 10.3 billion by 2020 and Lethbridge has an opportunity to meaningfully contribute to this goal.33

Data on visitation to Lethbridge is limited. As such, provincial studies on visitation to the Alberta South region are used as a general proxy to visitation to the city. Visitors to the city come for one of three purposes: 1) Leisure, 2) Sport and 3) Business. The following graphics illustrate visitation and visitor spending in the region.

Alberta is working to grow provincial tourism revenues to $10.3 billion by 2020 and Lethbridge has an opportunity to help the province achieve that goal.

Figure ES-3. Alberta’s Visitor Economy31
Understanding Southern Alberta's Visitation

Where Do Visitors Come From?

4.77 million person visits to Southern Alberta

= 17% of total visits to Alberta

39% of visits had at least 1 overnight visit

= 5.14 million overnight visits

Where Do They Come From?

Alberta Origins

- 87% Alberta
- 25% Canada
- 4% United States
- 26% Canada
- 8% United States
- 21% International

Why Do They Visit?

- Visiting Friends + Relatives: 51%
- Pleasure: 39%
- Business: 4%
- Other: 6%

When Do They Visit?

- 1st Quarter: 20%
- 2nd Quarter: 21%
- 3rd Quarter: 21%
- 4th Quarter: 38%

Where Do They Stay?

- Friends + Family: 59%
- Camping: 19%
- Hotel: 14%
- Commercial Fixed Roof: 4%
- Motel: 4%
Economic Impact of Tourism in Southern Alberta

**How Much Is Spent in Southern Alberta?**

$734 million = 9% of provincial visitor spending in Alberta

**How Many Jobs Are Created?**

10,185 full-time equivalent jobs generated in tourism sector

$322 million = total tax revenue accrued to all three levels of government in 2012 as a result of tourism activity in Southern Alberta

**Overnight Visits to Southern Alberta**

- 51% to visit friends and family
- 39% for pleasure
- 4% of overnight visits were for business
Lethbridge’s Visitor Experiences & Tourism Resources

A tourism experience happens at the intersection of local people, local culture and local geography. Planning for Lethbridge’s tourism future needs to begin by taking stock of the city’s current visitor experiences and the resources on which they are founded. Tourism resources are the natural and built assets and infrastructure that facilitate positive visitor experiences within the settings and landscapes in which they occur. Collectively, these tourism resources are Lethbridge’s competitive advantage. Retaining and enhancing the quality and integrity of the city’s resources is essential to today’s and tomorrow’s tourism industry.

Lethbridge’s Visitor Experiences

Lethbridge offers visitors a wealth of tourism experiences. Whether it be attending or participating in a regional tournament or a national championship sporting event, attending business conference at one of the city’s conference centres, visiting one of the city’s parks and natural areas in the river valley, enjoying a popular festival such as Whoop-Up Days, being cultured in the Galt Museum or experiencing the beauty of the Nikka Yuko Japanese Garden or simply base camping in Lethbridge while touring around the region, Lethbridge offers an experience for anyone.

The city’s tourism experiences are categorized as follows:

- Sport Tourism
- Business Travel
- Leisure Travel including:
  - Festivals & Events
  - Nature-based, Adventure & Eco-Tourism
  - Cultural, Heritage & Arts Tourism

Visitors from near and far want to explore the unique, the exotic and the unexpected when visiting a destination. The tourism market place is fierce and destinations need to differentiate themselves, using their unique visitor experiences and tourism resources, if they are to gain market share.

Sport Tourism...

Is the intersection between sport and tourism. Sport tourism is any activity in which people travel to a particular location, outside of their home town, as a sport event participant, an event spectator, or to attend sport attractions or business meetings. Sport Tourism is one of the fastest growing segments of the tourism industry.

Business Travel

includes travel for the purpose of business, versus leisure, and whose travel expenses are paid by the business the person works for.
In Lethbridge…

5 Regional Level Sport Tourism Facilities

18 Provincial Level Sport Tourism Facilities

19 National Level Sport Tourism Facilities

3 International Level Sport Tourism Facilities

---

Lethbridge’s Tourism Resources

Enabling these experiences are a diverse suite of tourism resources.

Sport Tourism

With approximately 46 sport facilities, Lethbridge is a major player in this growing industry. Lethbridge’s sport facilities range both in size and in the ability to host different types of sport events.

Figure ES-4. Sport Tourism Features
Business Travel

There are 27 business event spaces in Lethbridge capable of hosting meetings, incentives, conventions and exhibitions. These spaces vary considerably in their size and capacity. Most of the business events spaces are hotels with associated gathering and meeting rooms. When understanding the city’s supply of facilities to attract business tourism, it is important to note that the city does not have a large scale centralized convention and trade centre. However, Lethbridge Exhibition has developed concept plans and is pursuing the development of such a facility which has been identified by stakeholders as a significant priority.

316,319
square feet of
meeting space

10,105
business travellers
can be accommodated in Lethbridge

Figure ES-5. Business Travel Features and Meeting Space Capacity
Leisure Travel

Leisure travel experiences in the city are categorized into the following groups: Festivals and Events; Nature-based, Adventure & Eco-tourism and Cultural, Heritage & Arts. In addition, the city is also a jump off point to many regional tourism resources.

Festivals & Events

From Whoop-Up Days, to Lethbridge Arts Days, the International Air Show, International Peace PowWow and the Farmers’ Market, Lethbridge clearly recognizes the tremendous benefits that events and festivals bring to its communities, businesses, identity, and way of life. Since 1897, Exhibition Park has been the city’s primary venue for hosting tradeshows, Farmers’ Markets, midways and rodeos, Ag Expo, and Children’s Festival to name a few. While each event and festival is unique from one another, they share a common purpose of providing an experience for everyone.
Nature-based, Adventure & Eco-tourism

With approximately 85 nature-based, adventure and eco-tourism features, visitors to the city are offered a chance to get close to nature. One of the city’s more natural and eco-tourism assets is the river valley—a truly extraordinary valuable natural valley that is 1.6 km wide with its banks reaching over 300 feet in height. While the river valley is one of the city’s most magnificent natural areas, some of the stakeholder interviewees explained that it, and other nature-based, adventure and eco-tourism opportunities are not promoted effectively to visitors and are missed by many.

Figure ES-6. Nature-based, Adventure, & Eco-tourism Features
Cultural, Heritage & Arts

Lethbridge is rich in culture, history and the arts. As discussed in other sections, the city’s history is eclectic and the many stories that have shaped its identity—from early Indigenous settlement to coal mining and irrigated agriculture—act as tourism attractions today. With 22 different cultural, heritage and arts features, the city has a mix of features supporting an emerging arts sector. Most of these features are concentrated in the city downtown core.

Figure ES-7. Cultural, Heritage & Arts Features
Regional Tourism Resources
As southern Alberta’s tourism gateway, the city is a jumping off point for travellers to the region. Lethbridge’s central location is one of its greatest competitive advantages. Some of the more popular experiences include the region’s only World Heritage Site, Head-Smashed-In Buffalo Jump. Visitors can check out Writing-on-Stone Provincial Park, found in the spectacular Milk River Valley which contains the largest concentration of First Nation petroglyphs and pictographs on the great plains of North America. Visitors can also easily access the multitude of nature-based, adventure and eco-tourism experiences in the Crowsnest Pass and Castle region. The Castle has recently been designated as a new provincial park with focus on enhancing its nature-based, adventure and eco-tourism experiences.
Lethbridge’s Accommodations

The majority of the city’s 20+ accommodation features are hotels and motels, which contain approximately 1,631 guest rooms distributed across the city (see Figure ES-8). The University of Lethbridge and Lethbridge College, combined, offer another 200 guest rooms for visitors. As shown in Figure ES-8, the city’s accommodation features are mostly concentrated in the central-east along Highway 5 (Mayor Magrath Dr S) from 4th Avenue South to 24 Avenue South. The map shows the lack of accommodation features in the western, northern and southern portions of the city. Some stakeholders noted that west Lethbridge will require more amenities and accommodations in the future as it continues to experience the city’s fastest population growth.

Accommodations by the Numbers

- **20** Hotels/motels in the city
- **1,631** Guest rooms
- **1** RV park

Figure ES-8. Accommodation Features
When analyzing the status of the city’s accommodation sector, attention is also focused on evaluating the accommodation sector’s key performance metrics:

- Occupancy percentages
- Average daily rates
- Revenue per available room (RevPAR)

Lethbridge’s performance is benchmarked with similar communities across Canada to provide comparative context.

**Occupancy Rates**

After setting a record high in 2013 at 62%, the 2014 occupancy rate dropped to 58.4% ending a three year upward trend. The 2015 occupancy percentage in Lethbridge decreased further to 52.9%. The current occupancy rate is still equivalent to the mean over the last nine years. It is also important to note that all comparative cities also decreased between 2014 and 2015. Fortunately, Lethbridge experienced the smallest annual decrease between 2014 and 2015 of all comparative cities but still ranks fifth of the six comparable cities.

![Figure ES-9.2015–2014 Annual Occupancy Rate Comparison](image)

**Average Daily Rate**

Lethbridge has experienced an increase in its Average Daily Rate (ADR) since 2006. At $112.12 in 2015, the Lethbridge ADR increased from $111.21 in 2014 and $108.64 in 2013 extending its upward trend to five years. The Lethbridge ADR increased by 0.8% over 2014 while the provincial average ADR declined by 2.4%. Lethbridge ADR is lower than all six comparative cities.

![Figure ES-10. Average Daily Rate: Annual Comparison](image)
Revenue Per Available Room

Lethbridge RevPAR dropped from $67.40 in 2013 to $59.37 in 2015, ending a three year upward trend. Between 2014 and 2015, the city experienced a 7.8% decrease in RevPAR. Despite this decrease, Lethbridge experienced the second smallest decrease of all comparative cities.

Figure ES-11. Revenue per Available Room
Access

As shown in Figure ES-12, the city is easily accessible for travellers from Alberta, Saskatchewan, British Columbia and Montana via Highway 2, Highway 3 (Crowsnest Highway), Highway 4 and Highway 5. Visitors can travel to the city by bus transportation with Greyhound Canada and Red Arrow Motor Coach who provide daily trips Canada-wide and to Calgary and Edmonton, respectively. Easily accessible by car and bus, the city is also accessible by air via regular flights with Air Canada into the Lethbridge Airport, which is owned and operated by Lethbridge County.

Figure ES-12. Access
**Strengths** and **Weaknesses** refer to matters inside the destination, ones that destination leaders can act on and control.

**Opportunities** and **Threats** are typically matters outside of the destination that destination leaders may not be able to act on or control.

### Destination Analysis

**SWOT**

As a destination, Lethbridge has many strengths and opportunities but does face a number of key weaknesses and threats. Though the following is not an exhaustive list, the greatest strengths, weaknesses, opportunities and threats include:

<table>
<thead>
<tr>
<th>Strength</th>
<th>Weakness</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Partnerships and keen interest in and commitment to growing tourism.</td>
<td>• Fragmented leadership and governance structure and lack of a coordinated brand and vision for tourism.</td>
</tr>
<tr>
<td>• Diversity of existing sport, business and leisure travel experiences and potential to develop more.</td>
<td></td>
</tr>
<tr>
<td>• Favourable economic climate for growth of tourism</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Threat</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Purposefully pursue the development of the city’s under-realized tourism experiences.</td>
<td>• Limited awareness and understanding of tourism opportunities in the city and potential to use the city as a base for regional experiences.</td>
</tr>
<tr>
<td>• Alignment and strengthening of tourism governance and leadership</td>
<td></td>
</tr>
</tbody>
</table>
Destination Lifecycle

Destinations have a lifecycle. Destinations are continually evolving. In accordance with Butler’s Destination Lifecycle Model, destinations transition through a consistent cycle with distinct stages. Each stage of the cycle brings different characteristics. The experiences on offer change, available amenities and accommodations evolve, visitors and visitor origins change, ease and type of access changes and market share grows. To inform the development of strategies and priority initiatives, it was important to understand where each of the visitor experience themes provided in the city were on the destination lifecycle.

**Figure ES-13. Lethbridge Destination Life Cycle Assessment**
The Way Forward

Destination Strategy

Though visitors travel to destinations for different many reasons, a primary travel motivator is the underlying motive responsible for compelling most travellers to visit the destination. Recognizing that the city is the largest urban centre, a regional gateway and provides the greatest range of air access options in southern Alberta, the city’s is uniquely positioned to focus on two primary travel motivators:

- Sport Tourism
- Business Events

The city will focus great attention on developing and prioritizing its sport tourism and business events sectors as a primary means of growing target market visitation.

However, the city is also blessed with a rich array of arts, culture, heritage, Indigenous and natural assets which provide opportunity to grow the leisure travel sector and extend the stay of sport tourism, business event and regional travellers. As such, the city will focus, as a second priority, on developing its leisure travel sector and its role as a regional gateway and hub for the Canadian Badlands and Crowsnest Pass and Castle destinations.

Leisure travel experiences will be packaged with and pro-actively marketed to sport event participants and spectators as well as business event attendees as a convincing tactic to extend these travellers length of stay and spending.

Primary Travel Motivators:
- Sport Tourism
- Business Events

Secondary Travel Motivators:
- Leisure Travel
- Arts, Culture, Heritage, Indigenous, Nature

A Vision for the Future

A new vision for tourism has been corroboratively developed to guide the city’s tourism industry.

IMAGINE... by 2026, Lethbridge will be...

Southern Alberta’s premier destination for sport tourism and business event hosting. Visitors from across Canada and the world who come to Lethbridge, whether it be for sport, business or leisure travel, will experience the city’s authentic nature, arts, culture, heritage and Indigenous stories. In addition, the city will be an appealing regional gateway and accommodations hub serving visitors to the Canadian Badlands, Crowsnest Pass and Castle. The city’s unified tourism brand is being consistently marketed to target markets and the tourism industry is strongly embraced by residents who recognize the positive economic, social and environmental benefits it provides. The city’s tourism champions are unified and collaboratively focused on growing new visitation to the city, expanding tourism investment and effectively managing the destination.
Desired Outcomes
Over the next ten years, the tourism industry will work to:

Experiences
- Be recognized as one of Alberta's premier sport and business event hosting destination
- Grow its role as a regional gateway and hub for the Canadian Badlands and Crowsnest Pass and Castle destinations
- Increase leisure travel experiences featuring the city's history, arts, culture, nature, adventure and eco-tourism opportunities

Economic Growth and Diversification
- Increase year-round visitation by target markets
- Increase the length of time visitors stay in the city
- Increase the visitor spending and total economic impact to the city from tourism
- Increase private and public sector investment in tourism projects
- Increase community and stakeholder support for tourism in the city

Unified Destination Governance & Management
- Establish a unified and effective destination leadership model
- Maximize the positive benefits tourism brings to the city while minimizing the negative social, cultural and environmental impacts

Strategies
To achieve the vision and the established outcomes, the city's tourism industry and its partners will remain diligently focused on implementing ten clear strategies.

DESTINATION LEADERSHIP
- Create a Single, Unified, Destination Management Organization

DESTINATION DEVELOPMENT
- Cultivate & Diversify the City's Business Event Sector
- Grow the City's Sport Tourism Portfolio
- Enhance the Diversity and Quality of Experiential Leisure Travel Opportunities
- Provide the Right Mix of Places to Stay

DESTINATION MANAGEMENT
- Easier Access
- Strengthen the Capacity of the Tourism Industry
- Maintain the Competitiveness and Enhance the Sustainability of the City's Tourism Industry

DESTINATION MARKETING
- Build Community and Stakeholder Support for Tourism Growth - Internal Marketing
- Build Market Awareness and Inspire Event Organizers and Visitors to Experience Lethbridge
THE WAY FORWARD AT A GLANCE

Vision

By 2026 Lethbridge will be...
Southern Alberta’s premier destination for sport tourism and business event hosting. Visitors from across Canada and the world who come to Lethbridge, whether it be for sport, business or leisure travel, will experience the city’s authentic nature, arts, culture, heritage and Indigenous stories.

Outcomes

To achieve the city’s new tourism vision, the city will:

Experiences

- Be recognized as one of Alberta’s premier sport and business event hosting destination
- Grow its role as a regional gateway and hub for the Canadian Badlands, Crowsnest Pass and Castle destinations.
- Increase leisure travel experiences featuring the city’s history, arts, culture, nature, adventure and eco-tourism opportunities.

Economic Growth & Diversification

- Increase year-round visitation by target markets.
- Increase the length of time visitors stay in the city.
- Increase the visitor spending and total economic impact to the city from tourism.
- Increase private and public sector investment in tourism projects.
- Increase community and stakeholder support for tourism in the city.

Unified Destination Governance & Management

- Establish a unified and effective destination leadership model.
- Maximize the positive benefits tourism brings to the city while minimizing the negative social, cultural and environmental impacts.
Strategies & Priority Initiatives

Destination Development

CULTIVATE & DIVERSIFY THE CITY’S BUSINESS EVENT SECTOR
- Attract and host business events targeting the city’s most competitive industries and knowledge capital.
- Extend business travellers stay beyond the business event.

GROW THE CITY’S SPORT TOURISM PORTFOLIO
- Increase the number and diversity of sporting events delivered annually.
- Attract, organize and deliver a major competitive multi-sport event every 5 years.

ENHANCE THE DIVERSITY & QUALITY OF EXPERIENTIAL LEISURE TRAVEL OPPORTUNITIES
- Strengthen the city’s nature based, adventure and eco-tourism opportunities.
- Enhance the city’s role as a regional gateway to the Canadian Badlands and Crowsnest Pass and Castle destinations.
- Enhance the city’s arts, culture and history experiences.
- Enhance and create Indigenous tourism experiences.

PROVIDE THE RIGHT MIX OF PLACES TO STAY
- Diversify and enhance the supply of accommodations for sport, business and leisure travellers.

Destination Management

PROVIDE EASIER ACCESS
- Make it easier for visitors to access and travel within the city.

STRENGTHEN TOURISM INDUSTRY CAPACITY
- Prepare the industry to deliver exemplary visitor experiences.
- Develop the tools to enable the tourism industry and partners to grow tourism.
- Enable informed and timely destination decision-making and reporting.

MAINTAIN THE COMPETITIVENESS & ENHANCE THE SUSTAINABILITY OF THE CITY’S TOURISM INDUSTRY
- Integrate the needs of tourism in regional and local land use planning and decision making.
- Plan for and pro-actively manage undesirable impacts associated with growing tourism.
- Encourage sustainability practices in the planning, design, construction and operations of tourism businesses.

Destination Marketing

BUILD COMMUNITY & STAKEHOLDER SUPPORT FOR TOURISM GROWTH—INTERNAL MARKETING
- Strengthen buy in and sustain endorsement and commitment to implementing the DMP.

BUILD MARKET AWARENESS & INSPIRE EVENT ORGANIZERS & VISITORS TO EXPERIENCE LETHBRIDGE
- Develop a tourism brand and storytelling framework inspired by the city’s unique selling proposition and promote it to stakeholders and target markets.

Destination Leadership

CREATE DESTINATION LETHBRIDGE—A SINGLE, UNIFIED, DESTINATION MANAGEMENT ORGANIZATION
- Identify the optimal governance structure under which to develop Destination Lethbridge.
Galt Ballroom
1. INTRODUCTION

1.1 Destination Management Planning

Destination Management Planning is a process of leading, influencing, and coordinating the management of all aspects of a destination that contribute to a visitor’s experience, taking account of visitor needs, local residents, businesses and environment. As a comprehensive and collaborative process, it enables a destination to identify its target markets and competitive advantages, and think about how the unique tourism resources will be managed; how the capacity of the destination will be enhanced; how effects on the destination will be understood and dealt with, and how the destination will reach out to and compel its target markets to visit.

The United Nations World Tourism Organization (WTO) developed a destination management planning model in 2007. The model relies on a number of pillars that help to promote a destination that is competitive. These pillars include the following:

- **Destination Development Planning**—The destination’s current tourism assets, consultation and investment
- **Destination Management**—Protecting tourism assets and focused on delivering quality experiences in a sustainable way
- **Destination Marketing**—Now that tourism assets have been identified and a plan has been created on how to protect and promote them, the city must determine who to target its marketing efforts toward.

![Destination Management Planning Tool](Source: World Tourism Organization, 2007)
1.2 Planning Process

The Destination Management Plan provides direction to tourism development, management and marketing in Lethbridge for the next 10 years. It is a framework in which tourism industry partners can work collaboratively towards achieving a shared future for tourism.

The development of the plan has been facilitated by a tourism strategy committee of dedicated partners who are interested in supporting the growth of tourism in the city. The partnership has worked collaboratively with provincial, regional and local tourism industry, destination marketing organizations, partners and local tourism business to co-create the plan. The process involved three stages:

1. **DISCOVER**

In the discover stage, the project team worked collaboratively with the Lethbridge City Council Tourism Strategy Committee (Tourism Strategy Committee) and tourism partners to uncover essential information about the destination’s history, relevant policies and plans to tourism development, tourism assets, destination organization, current visitation, target markets, market demands, marketing strategies, visitor voice, SWOT analysis, and destination lifecycle. Stakeholder interviews and workshops with the tourism strategy committee, in addition to document review and desktop analysis, were combined with a rigorous online crowdsourced asset inventory and social media analytics tools to generate insights into the destination and its opportunities and constraints. A product market match was then employed to identify “gaps” between the current tourism service offering and the expectations of the key target markets. Opportunities to address the service gaps and elevate the city’s competitive advantages were identified.

### Lethbridge City Council Tourism Strategy Committee

- Councillor Bridget Mearns, Chair
- Councillor Jeff Carlson
- Councillor Joe Mauro
- Erin Crane, Economic Development Lethbridge
- Trevor Lewington, Economic Development Lethbridge
- Nikolaus Wyslouzil, Chinook Country Tourist Association
- Susan Eymann, Lethbridge Sport Council
- Sacha Johnson, Lethbridge Lodging Association
- Amanda Jensen, Lethbridge Lodging Association
- Dan Berdusco, Community Member
- David Robb, Community Member

### Committee Support:

- Jody Meli, Project Sponsor, City of Lethbridge
- Lorna Kurio, Project Manager, City of Lethbridge
- Jessica Robinson, Committee Assistant, City of Lethbridge
- Laura McGowan, Alberta Culture and Tourism
- Anastasia Martin-Stilwell, Travel Alberta
2. IMAGINE

The imagine stage was focused on identifying the opportunities to make Lethbridge a must-experience destination. The draft vision, goals, strategies, and actions were prepared, largely based on the input received through engagement. Tourism themes were delineated, and existing, new and refreshed tourism experiences, along with a destination leadership and governance structure were recommended. New and refreshed tourism experiences and supporting activities, attractions, amenities, accommodations and access were identified and assembled into a preliminary destination management plan.

3. DELIVER

In the final stage, the draft plan was reviewed with the tourism strategy committee and tourism organizations through workshops and MindMixer. Thereafter, the final Destination Management Plan was prepared.

1.3 Tourism Partners

The following organizations, with broad mandates that include targeted marketing, experience development and collaborative partnerships, have been working to grow the city’s and the region’s, tourism industry:

Chinook Country Tourist Association (CCTA): markets Lethbridge and southwest Alberta and works with tourism attractions, accommodations, entertainment organizations/businesses, and municipalities to develop tourism experiences.

Economic Development Lethbridge (EDL) (Meeting and Event Development): an independent, not-for-profit organization that focuses on promoting Lethbridge as an attractive destination for the business and event traveler. Meeting and event development is their key component.

Lethbridge Sport Council (LSC) (Sport Tourism): provides leadership and a collective voice for sport in Lethbridge, offering quality sport experiences to all and attracting, creating and retaining sport tourism opportunities for Lethbridge.

Lethbridge Lodging Association (LLA): an association of Lethbridge accommodation properties working together to increase overnight stays for member properties.

Canadian Badlands Limited: responsible for developing and marketing the southeast region of the province including Lethbridge. The City of Lethbridge is a shareholder of the corporation.

Engagement by the Numbers

6,445 Mindmixer Page Views
2,502 Unique Visitors on Mindmixer
151 Stakeholders Invited to Participate
18 Interviews
77 Tourism Conversation Attendees
105 Comments Received
1.3.1 Community and Stakeholder Engagement

Determining the future of tourism in the city is best determined by those who live and work in city. Meaningful engagement of residents, the tourism industry, business community, sport sector, city staff and other partners was essential to the development of this plan. Over 150 local tourism industry members and stakeholders were identified and invited to take part in the planning process. Interviews, online engagement platforms and workshops were held in an effort to co-create the plan.

Three workshops were hosted over the planning process:

- November 5, 2015—Big Ideas Workshop with the Tourism Strategy Committee and invited stakeholders (17 participants)
- March 22, 2016—Tourism Strategy Committee workshop to review the draft plan (17 participants)
- June 14, 2016—Community Tourism Conversation to present the final draft plan (77 participants)

Interviewees:

- Lethbridge Sport Council
- Economic Development Lethbridge
- Chinook Country Tourism Association
- Lethbridge Lodging Association
- Heart of OurCity Committee
- County of Lethbridge/Lethbridge Airport
- ENMAX Centre
- Exhibition Park
- Bridgeview RV Resorts/Holiday Trails RV Resorts
- International Peace Pow Wow
- Lethbridge Casino
- Park Place Mall
- Lethbridge Link
- Travel Alberta
- Canadian Badlands Limited
- Fort Whoop-Up
- Galt Museum & Archives
- Allied Arts Council of Lethbridge
Tourism Conversation, 2016
Tourism can...

- Diversify the economic base as visitor spending leads to the creation of new and expanded enterprises.
- Create employment opportunities for both skilled and less-skilled employees who are young and old.
- Encourage new businesses as tourism operations depend on the services of other sectors such as construction, transportation, and agriculture.
- Stimulate increased commercial and residential development as enhanced tax revenues flow to local governments.\(^3\)
2. THE BENEFITS OF TOURISM

Tourism has the potential to bring many and diverse benefits to host destinations. For communities, such as Lethbridge, that have the potential to become a successful tourism destination, the benefits are not limited to economic. As destinations develop the right mix of experiences, services and amenities for its target markets, visitation will only increase. As visitation increases, destinations become more competitive and can continue to enhance and develop new opportunities for tourism activities for both locals and visitors. Over time, as a host community gains a consistent visitation base, they will begin to experience the real economic, social and environmental benefits of tourism.

Tourism can...
- Enhance the quality of life in communities by stimulating investment in transportation, recreational facilities, entertainment and other services that benefit both locals and visitors.
- Help to preserve a region’s cultural heritage—including its traditional ways, places, spaces and stories—as they become the assets on which experiences are based.
- Elevate local community awareness and pride by sharing the community with visitors and taking ownership for their experiences.3
- Contribute to population retention or even re-population as tourism provides employment opportunities or amenity development attracts “would be residents”.
- Raise the profile of natural assets and issues surrounding them as effective visitor information services, interpretative signing, guided tours, etc. allow visitors and locals to learn.
- Enhance the rationale for conservation, preservation and restoration of natural and built resources on the basis of their revenue generation and importance to local economies.
- Inspire a culture of conservation as local residents and visitors learn more about a region’s wildlife, ecosystems and ecosystem processes.3
With the global travel market’s growing expectation for sustainability, destinations cannot think of “sustainable tourism” as a set of niche products. Rather, sustainability should be regarded as an expectation placed on the entire tourism sector and all of its players.\(^2\) The most successful destinations are those that remain equally focused on realizing the benefits of tourism by meeting or exceeding traveller expectations while simultaneously managing visitation to maintain social and cultural integrity, address amenity migration\(^a\) and protect the environment.\(^2,4\)

**Alberta’s Tourism Vision:**

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

—Alberta Tourism Framework. Alberta Tourism, Parks and Recreation, 2013 (p.15)

\(^a\) Amenity Migration is the movement of people based on the draw of natural and/or cultural amenities and can be thought of as both a driver and an implication of the current transition of rural communities. In the case of Lethbridge, amenity migrants may be attracted to the beautiful landscapes of the city and region, relatively mild climate, slower pace of life, more intimate community, educational opportunities with the college and university, its attributes as a retirement destination, a place to raise a young family, and a place to start a small business.
To enable a strong and supportive planning and policy framework for Lethbridge’s tourism industry, it is important to reflect upon and understand existing policies and strategies that provide guidance on tourism development. Tourism in Lethbridge is guided and influenced by many different policies, strategies and plans at many different scales. Efforts have been made to ensure the plan is aligned, to the extent possible, with the relevant planning and policy framework (see Figure 2). For an overview of each policy, please see Appendix A Policy Overviews.

Figure 2. Tourism Planning Framework
The City of Lethbridge has been identified as a primary destination in the Canadian Badlands Tourism Development Strategy.

- **The Plains Peoples' Route**: This route will move markets from Dinosaur Provincial Park to Blackfoot Crossing Historic Park, creating, with the Dinosaur Touring Route, a circle route from Calgary adding an internationally significant cultural “Attractor” to the product mix.

- **Alberta's Southern Agricultural Route**: The corridor between Medicine Hat and Lethbridge will attract regional and national markets. The corridor will present agri-tourism products and southern Alberta culture along Highway 3.
Highlights From the Policy and Planning Summary

• At the national, provincial and regional levels, there are a number of supporting objectives and policies that can help Lethbridge realize its tourism potential.

• Lethbridge has been identified as one of the primary destinations (tourism hubs) in the Canadian Badlands Tourism Development Strategy which can position the city as a premier tourism “jumping off” point in southern Alberta.

• The City’s ICSP/MDP contains little direction on how to advance tourism in the planning process which presents an opportunity once the DMP has been adopted.

• The Recreation and Culture Master Plan identifies the connection and potential relationship between tourism and the city’s recreational and cultural assets.

• Many of the city’s tourism leaders have clear business plans reflecting the city’s primary visitors experience targets—sport and business - but these plans have not been integrated under a common tourism vision or brand for the city.

• The City’s Recreation and Culture Master Plan recognizes the potential of tourism in recreation and cultural assets. The plan explicitly calls for a tourism strategy to develop a common strategic direction to better coordinate tourism marketing in the city.
4. DISCOVER LETHBRIDGE

4.1 Destination Overview

As southern Alberta’s largest city, with access to a range of Provincial and National Parks, world-class tourism attractions, a rich history, and spectacular geography, Lethbridge is unlike any other city in the province of Alberta. The study area (see Figure 3 below) covers approximately 124 square kilometres and includes everything from a prominent river valley, to over 100 parks and natural areas, and one of the world’s most magnificent bridges.

Figure 3. Destination Overview
4.1.1 Population & Demographics

As of 2015, Lethbridge was home to approximately 94,804 people making it the fourth most populous city in Alberta.\textsuperscript{17,14}

Since 2010, the city’s population has grown by 9%, increasing from 86,659 to 94,804 in 2015. Estimates show that over the next 35 years, Lethbridge will grow by approximately 45,000 residents, reaching 130,000 by 2050. \textsuperscript{14}

As shown below, the city’s population is evenly distributed between three regions: north, south, and west Lethbridge. Over the past 30 years, about 75% of the city’s population growth occurred in west Lethbridge and projections show that west Lethbridge will absorb 70% of the city’s population growth from 2010 to 2050.
<table>
<thead>
<tr>
<th>Category</th>
<th>Lethbridge</th>
<th>Alberta</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Household Income</td>
<td>$76,716</td>
<td>$79,102</td>
</tr>
<tr>
<td>Immigrants</td>
<td>11%</td>
<td>18%</td>
</tr>
<tr>
<td>Median Age</td>
<td>36.4</td>
<td>36.5</td>
</tr>
<tr>
<td>Post-secondary certificate, diploma or degree</td>
<td>61%</td>
<td>64%</td>
</tr>
<tr>
<td>Apprenticeship or trade certificate/diploma</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>College, CEGEP or other non-university certificate or diploma</td>
<td>24%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Source: Statistics Canada’s 2011 National Household Survey
4.1.2 Economic Profile

Lethbridge is the economic hub of southern Alberta. Its economy is diverse with a large share of the workforce employed in the retail, education, and healthcare sectors. To understand how tourism interacts with the city’s economy, the project team undertook an analysis of available economic data and summarized this information below:

- In 2011, the largest employers by industry included trade—retail & wholesale, health & social services, and education services employing 8,020, 6,210, and 4,765 people, respectively.
- In 2011, using National Household Survey data, the three industries that best supported tourism included information and cultural industries; arts, entertainment and recreation; and accommodation and food services. These industries collectively employed over 7,000 persons, or 11% of the total labour force in 2011.
- According to the National Household Survey, in 2011, the unemployment rate for the Lethbridge was 6.2% compared to 5.8% for the province as a whole.
- In 2013, the major employers of Lethbridge included Alberta Health Services, University of Lethbridge, and City of Lethbridge with 2,803, 2,172, and 1,386 staff.
- Forty-six of the businesses in Lethbridge employ more than 100 people; combined, these businesses and organizations employ more than 21,000 people in Lethbridge or 42.5% of the employed workforce.
- The top 10 employers in the city contribute 12,706 jobs to the local economy and these employers have increased their total workforce by 48.5% since 2003.

So what?

As the economic hub of southern Alberta, Lethbridge has a diverse economy and skilled workforce that can accommodate an increased level of tourism activity. Tourism can also bring increased revenues and contribute to the city’s GDP.

Health services, University of Lethbridge, municipal government and agriculture are major employers and these industries can form a strong focus for future business tourism.
4.2 Lethbridge’s Stories—History & Culture

4.2.1 Indigenous Peoples

Long before the area where we now find Lethbridge became known for its coal, railways and irrigated agriculture, Indigenous peoples lived and traveled throughout the grasslands of southern Alberta. Lethbridge sits on Traditional Blackfoot and Treaty 7 Territory. The Blackfoot Confederacy, also referred to as Siksikaisitapi, is comprised of three nations located in southern Alberta—the Kainai, Piikani and Siksika. Traditional Blackfoot Territory extends north to the north Saskatchewan River, east into Saskatchewan, south to the Yellowstone River, and west to the Rocky Mountains.

The Blackfoot people refer to themselves as Niitsitapi, meaning “the real people,” which is a generic term applied to all Indigenous peoples, or Siksikaisitapi, meaning “Blackfoot speaking real people.” The Blackfoot peoples, prior to the disappearance of the buffalo and their forced relocation onto reserves, moved seasonally with the buffalo hunt and to access necessary resources. In 1877, Treaty 7 was signed between the three Blackfoot Nations of southern Alberta, the Tsuu T’ina, the Stoney Nation and the Government of Canada. Since then, the Blackfoot people have worked hard to maintain their knowledge, traditions, ceremonies, language, feasts and dances, through adversity and assimilatory government policies.

Today, the Blackfoot peoples are actively practicing and in some instances becoming reacquainted with traditional land use practices, ceremonies and knowledge. Because the Blackfoot peoples occupied all corners of their traditional territory, their legacy is interwoven in the history, present and future identity of southern Alberta. Examples include Waterton Lakes National Park and Head-Smashed-In Buffalo Jump, one of the oldest, largest and best-preserved buffalo jumps in Canada. Both sites are recognized as UNESCO World Heritage Sites. Another important site in the Blackfoot Worldview is Writing-on-Stone Provincial Park/Áísínai’pi, which is currently seeking UNESCO designation.

These three sites, and the many other Blackfoot sites in the region, have unique cultural tourism potential that can work to create bridges between cultures, educate future generations and lead to enhanced collaboration, as envisioned by the guiding national, regional and local policy and planning framework.

High Level Bridge
4.2.2 Coal Mining

Lethbridge’s economic history began with the discovery of coal in the 1870s which was a lucrative industry for the city up until 1965.23 With over 100 mines and over 3,200 km of tunnels, coal was an extensive and critical part of the city’s and region’s economy. Coal was so abundant in and around the city that the Blackfoot Nation gave the region the name of “Sik-okotoks”, or place of Black Rocks.24 In 1874, Nicolas Sheran, one of the city’s founders, developed the first commercial coal mine in Alberta located across the Oldman River from a site that today is occupied by Fort Whoop Up. Sheran reaped large benefits from his coal mining activities and sold much of it to the Mounted Police in Fort Macleod and traders from Fort Benton, Montana.

In 1879, other explorers and entrepreneurs began to recognize the economic potential of coal and how infrastructure and transportation could make it an even more lucrative industry. The story goes that Elliott Torrance Galt visited Nicholas Sheran at his mine. He quickly advised his father, Sir Alexander Galt of the potential of a large scale mining operation that could be supported by the forthcoming trans-continental railway route that would traverse the southern prairies. As well, reports from members of the Geological Survey of Canada highlighted where coal was discovered in the area (personal community, Galt Museums & Archives). The railway and the settlers it would bring, was seen as a large opportunity to make coal mining more profitable. By 1900, there were about 150 men employed in the coal mining industry who mined 300 tonnes of coal every day. It reached its peak during World War I when about 2,000 miners in 10 large mines extracted 1 million tonnes of a coal per year.24

While the coal industry declined following World War I, it contributed significantly to the economic development and growth of the railways and irrigation development in southern Alberta. It also influenced and helped shape immigration in Lethbridge and surrounding area contributing to population growth and regional settlement patterns.

4.2.3 Railways

The story of southern Alberta’s railways is as important as the coal mining industry for understanding Lethbridge’s economic history. Approaching the turn of the 20th century, the Canadian Pacific Railway (CPR) constructed the Crowsnest Pass line from Medicine Hat to the Rocky Mountains. However, one of the main obstacles along this route was the river valley in Lethbridge. In the midst of decision-making about the best way to proceed, the CPR decided that a new bridge across the river valley and a shorter line to Macleod would cost a bit more than to repair the old wooden bridges and worn out track. The CPR proceeded in designing a mile long viaduct around 1907 that employed hundreds of people—a viaduct that today is known as the High Level Bridge.

The High Level Bridge and the railways more broadly, opened up Lethbridge and southern Alberta to mining, ranching and farming as these industries were highly reliant on railway transportation to transport coal, beef, and grains to the market. The railways also moved people, bringing in hundreds of families into Lethbridge looking for work and a new place to live.25

Our City’s High Level Bridge was constructed by the Canadian Pacific Railway in 1909. It is the longest-highest bridge of its type in the world and when it was completed, it was described as one of the “wonders of the world”. Today, the bridge forms an important part of our identity and represents one of our City’s most important heritage assets.
4.2.4 Irrigated Agriculture

While the coal industry and construction of the railways helped to shape Lethbridge’s economic development and growth, agriculture was another important pillar that brought the city many benefits. The agricultural industry grew out of land grants—totalling 1.5 million acres—that were established just south of Lethbridge. The land was intended to be sold by the Galt family to help finance railway construction. In order to do this, the Galt family needed to attract young farmers who would be keen to settle in the Lethbridge area. The climate was largely semi-arid and therefore needed immediate access to large scale water supplies. The Galt family saw an opportunity to use irrigation to fill this gap and make the agricultural lands more enticing. Elliot Galt and Charles A. Magrath, his brother-in-law, organized the Canadian North West Irrigation Company (CNWICO) to implement their irrigation plan and consulted with the Mormon farmers of Utah who were considered to be leading irrigation experts in North America.24

One of the most significant irrigation projects during this time was the St. Mary Project which began in 1898. Water from the St. Mary River was diverted through Kimball through a 10.5 mile long canal to Pinepound Creek. A year later in 1899, CNWICO completed the construction of canals and structures through to Stirling enabling the flow of water from Magrath to Stirling. And on September 4, 1900, the first irrigation water arrived in Lethbridge. When irrigation finally arrived to the agricultural lands surrounding Lethbridge, it was not enough to draw farmers to the area. However, with the establishment of the Dominion Experimental Farm (today known as the Agriculture and Agri-Food Canada’s Lethbridge Research Centre) in 1906, along with the use of a number of promotional ads by Lethbridge town council such as “no drought here”, Lethbridge would become the “Garden of the West”26. Over the years, a number of canals and natural channels were constructed which resulted in a large scale water distribution system supporting the water demands of both residential units and agricultural uses.

The construction of the St. Mary Irrigation Project brought water to Lethbridge at the turn of the century, which contributed to the city, region, and economy of southern Alberta. Irrigation brought a number of benefits to the region beyond diversifying and increasing agricultural productivity; it improved access to water for domestic, municipal, industrial and recreational water users and for conservation purposes.

So what?

1. The important economic history of coal mining is unique to Lethbridge. The Galt #8 Historic Site is already telling this story and with greater profile, the city’s coal history can be of interest to a broader range of tourists.

2. Without the railway, Lethbridge may not have witnessed its economic success. The High Level Bridge is an existing structure that exemplifies this history and is one of the most unique structures of its kind in the world.

3. The city’s agricultural history can be learned through agri-tourism experiences such as farm visits, farm stays, and farmers’ markets.

4. Sport tourism is strong in Lethbridge but its history may not be known to its visitors. There are opportunities to better showcase its sport tourism history to highlight its competitive advantages for tourism.
4.2.5  Sports History

Lethbridge’s sporting success did not just happen; it grew from as early as the 1880s. One of the first sporting organizations in the city was the Lethbridge Rifle Association, formed in 1886 with Sir Alexander Galt. Galt recognized the importance of sport and the legacy it could have for the city. He donated a tract of land in the city’s business district which was known as Galt Park (today the Galt Gardens). This tract of land saw Lethbridge sports teams compete in a “pantheon of sports” including baseball, soccer, lacrosse, cricket, and rugby. Other parts of the community were popular for sports, as well as hosting events and games including horse racing, polo, track and field, cycling, tennis, curling, skating, gymnastics, boxing, wrestling, golf and much more. The popularity of Lethbridge’s sports teams made them known across the Northwest Territories, as the Province of Alberta had not yet been established.

What makes Lethbridge’s sports history unique from other stories is how it brought people together from different communities and social strata; miners would compete against farmers in some sports, as would the police against merchants. Many of the sporting events were held as part of picnics and allowed for all levels of ability and participation. A particularly momentous event occurred in 1975, when Lethbridge hosted the Canada Winter Games. The Games provided the city with many benefits, including the construction of the ENMAX Centre which has “served as home to two Western Hockey League franchises and has hosted two Scotty Tournament of Hearts, the 1991 Alberta Winter Games, Skate Canada and more”. With tremendous success across the spectrum of sport—from the Lethbridge Maple Leafs’ World Hockey Championship in 1951, to Mary Popson winning more than 130 provincial medals between 1954 and 1984 in archery, to the dominant success of intercollegiate cross-country running. All of its success led to the creation of the Lethbridge Sports Hall of Fame, which was founded in 1985 and provides an indication of how important sports have and continue to be for the city today.

“The city has long been blessed with an intrinsic sporting nature, and has been governed by those who embrace the belief that involvement in sport, throughout the lives of its citizens, is a necessary element of community.”

—Lethbridge Sport Council
Wheel Sculpture by Galt Museum & Archives
5. TOURISM TODAY: ALBERTA, ALBERTA SOUTH & LETHBRIDGE

5.1 Tourism in Alberta

Tourism is a critical part of Alberta’s economy. The $8 billion tourism industry supports 19,000 businesses, employs approximately 114,000 people and attracts 33 million total visits annually. In 2013, tourism contributed $2.9 billion in GDP to the province and approximately $4 billion in total tax revenue to all levels of government.

Tourism in Alberta impacts the entire province creating jobs, infrastructure, and supporting community development, resulting in a number of direct, indirect, and induced economic benefits. Tourists spend money on recreation activities, food & beverages, accommodations, and transportation. Spending by employees and businesses in this sector helps pay for profits, salaries, buildings, and other infrastructure costs (indirect impact), which in turn pays for housing, groceries, public transit, and other personal costs (induced effect). Figure 4, from Alberta Culture and Tourism, illustrates how tourism spending affects the economy.

Figure 4. Alberta’s Visitor Economy
Of the 33 million total visits Alberta receives annually, about:

- 86% are Albertans
- 10% come from other parts of Canada
- 2% from the United States
- 2% from International origins

Visitation has grown steadily since 2000, however; Alberta is working to grow provincial tourism revenues to $10.3 billion by 2020 and Lethbridge has an opportunity to help the province achieve that goal. Tourism expenditures in the province have grown 1.8% annually since 2006, surpassing the national average of 1.3%. As of 2013, Alberta’s tourism expenditures were distributed as follows:

- 65% Albertans
- 19% Rest of Canada
- 7% United States
- 9% International

According to Travel Alberta, in 2013, there were 34.3 million person visits to the province with approximately $8 billion spent in total among all visitor groups. Of these visits, spending per person per trip (same day and overnight) among Albertans for a tourism purpose was $130. Table 1 below presents the full picture of average tourism expenditures by Albertans visiting Alberta and southern Alberta. The table shows the visitor spending for both Alberta and southern Alberta increased from 2012 to 2013.

**Table 1. Visitor Spending in Alberta and southern Alberta**

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average spend per person per...</strong></td>
<td>Alberta</td>
<td>Southern Alberta</td>
</tr>
<tr>
<td>trip (same day and overnight)</td>
<td>$126.2</td>
<td>$91.1</td>
</tr>
<tr>
<td>night (overnight only)</td>
<td>$84.3</td>
<td>$55.1</td>
</tr>
<tr>
<td>trip (overnight only)</td>
<td>$200</td>
<td>$135</td>
</tr>
</tbody>
</table>

Source: Alberta Culture & Tourism, Manager of Tourism Research and Evaluation
5.2 Visitors to Southern Alberta

5.2.1 Origins
The Alberta South Tourism Region (referred to as southern Alberta) represented 14% (4.77 million) of the province’s total person-visits and 9% ($734 million) of total provincial visitor spending in 2012. Albertans comprised 87% of the total visits to southern Alberta while another 9% of visitors were from other parts of Canada. Visitors from the United States represented 3% of visitation to southern Alberta, and other international visitors represented 1% of the total visits.

In 2012, residents of the southern Alberta region made up 50% of all visitation to southern Alberta. This was followed by residents of Calgary who comprised another 25% of visitation. Residents from Edmonton accounted for 7% of visitation, followed by residents of Central Alberta who accounted for 4% of visitation.

5.2.2 Overnight Stays
In 2012, 39% of visitation to the southern Alberta region included at least one overnight stay. Overnight stays by origin include:

- Approximately 26% of overnight stays were made by visitors from Calgary
- About 21% of overnight stays were made by visitors from the southern Alberta region
- Residents from Saskatchewan comprised 8% of overnight stays
- British Columbians represented 6% of overnight stays to the region.

The data on the purpose of overnight travel revealed that as of 2012, 51% of travellers to the southern Alberta region visited friends and relatives, followed by 39% of visitors coming for pleasure, 4% for business reasons, and 6% for other reasons.

The main purpose of overnight trips to southern Alberta was to visit friends and relatives (51%). At 39%, pleasure was the next most prominent overnight purpose. Only 4% of visits were for business. The remaining 6% stated other reasons for overnight travel.

Average Length of Stay
In 2012, visitors spent 46.10 million nights in Alberta, with 11% or 5.14 million nights spent in the southern Alberta region. Of the 5.14 million nights spent in the southern Alberta region:

- 59% or 3.03 million were spent in the homes of friends and family
- 19% occurred in campgrounds and trailer parks
- 14% stayed in hotels
- 4% stayed in other commercial fixed-roof properties
- 4% stayed in motels.
Overnight visits to the southern Alberta region averaged 2.8 nights in 2012. While Albertans account for the greatest number of visits, they have the shortest length of stay which might be explained by short and frequent visits with friends and family. On average,

- International visitors stayed 6.4 nights
- Canadian (non-Albertan) visitors stayed 3.2 nights
- Americans stayed 2.7 nights
- Albertans stayed 2.6 nights.\(^{17}\)

### 5.2.3 Seasonality

Throughout 2012, the highest percentage of overall overnight visits to the southern Alberta region was during the third quarter of the year (July, August, and September) with 38% of the total overnight visits. Visitation through the rest of the year was evenly balanced with 21% of travellers visiting during the second and fourth quarters of the year, and 20% visiting during the first quarter. Visitation in the third quarter by market group can be understood as follows:

- 36% of visits were made by Albertans
- 33% from other parts of Canada
- 58% of overnight visits made by residents of the United States occur in the third quarter and 22% occur in the second quarter.

About 49% of overnight visits from International visitors occurred in the third quarter and 37% occurred in the second quarter.

### 5.2.4 Visitor Spending

In 2012, direct spending by all tourists (resident and non-resident) in southern Alberta was approximately $734 million. As a result of visitor expenditures in southern Alberta, about 10,185 full-time equivalent jobs were generated in the tourism sector province-wide. Approximately $322 million in total tax revenue were accrued to all three orders of government as a result of tourism activity in southern Alberta. According to Alberta Culture and Tourism, in 2012, spending in a number of industries contributed to southern Alberta’s tourism sector.\(^{38}\) Below is a breakdown of the expenditures in the various industries in the southern Alberta region:

- Private / Rental Auto = $253 million
- Public / Local Transit = $36 million
- Recreation & Entertainment = $57 million
- Accommodation, Food & Beverage = $295 million
- Retail / Other = $93 million
Understanding Southern Alberta's Visitation

4.77 million
person visits to Southern Alberta
= 17% of total visits to Alberta

4.77 million
= 5.14 million overnight visits

39% of visits had at least 1 overnight visit

Where Do Visitors Come From?

Alberta Origins

Alberta: 25%
Canada: 4%
United States: 7%
International: 9%
Canada: 17%

Origins of Overnight Stays in Alberta

United States: 26%
Canada: 21%
Alberta: 8%
International: 6%

Average Length of Stay by Origin

Nights
Alberta: 2.6
Canada: 3.2
United States: 2.7
International: 6.4

Why Do They Visit?

Visiting Friends + Relatives: 51%
Pleasure: 39%
Business: 4%
Other: 6%

When Do They Visit?

1st Quarter: 20%
2nd Quarter: 21%
3rd Quarter: 21%
4th Quarter: 38%

Where Do They Stay?

Friends + Family: 59%
Camping: 19%
Hotel: 14%
Commercial Fixed Roof: 4%
Motel: 4%
Economic Impact of Tourism in Southern Alberta

**How Much Is Spent in Southern Alberta?**

$734 million

= 9% of provincial visitor spending in Alberta

**How Many Jobs Are Created?**

10,185 full-time equivalent jobs generated in tourism sector

**$322 million**

= total tax revenue accrued to all three levels of government in 2012 as a result of tourism activity in Southern Alberta
5.3 Visitors to Lethbridge

While visitation to southern Alberta may serve as a proxy for visitation to Lethbridge and surrounding communities, data is very limited for visitation to the city itself. The project team looked at data from Statistics Canada census divisions for Lethbridge, the Chinook Country Tourist Association visitor information centre, and information from the stakeholder interviews that were conducted.

“Of the Alberta Visitors, operators perceive that visitor [to southwestern Alberta] originate from Calgary, Lethbridge, Edmonton, and the rest of Alberta.”


5.3.1 Census Division Data

*Person Visits to Census Divisions 2 & 3 (combined—2007 to 2010)*

Figure 5 below shows visitation data for Census Division 2 (Lethbridge) and 3 (Fort Macleod); regional census region data may be indicative of visitation to attractions throughout the greater southern Alberta region, rather than specific to just the City of Lethbridge. Therefore, consideration should be given to how regional attractions may impact visitation or potential visitation to Lethbridge. As shown in the figure, Albertans are the overwhelming source of visitors to these Census Divisions comprising 78% of total visits in 2010. Visitation in 2010 was lower for other market groups—about 10.5% of visitors originated from the rest of Canada, 8.6% from the United States, and 2.8% from overseas. Overall, regional data may assist in analyzing behaviours of visitors, particularly Cultural Explorers (and those Free Spirits who may be attracted to regional, iconic attractions).

![Figure 5. Person-visits to Census Divisions 2 & 3](image-url)
5.3.2 Event Visitors to Lethbridge

Economic Development Lethbridge (EDL), maintains data on estimated event visitors to Lethbridge. These visitors are categorized into three distinct categories: 1) sport; 2) business and 3) SMERF (Social, Military, Educational, Religious, and Fraternal). As shown in Figure 6, the majority of Lethbridge’s visitors come for a sports event or competition or SMERF. Business travel is reported to be generating the fewest visitors of the three sectors monitored. Over the past five years, event visitation was highest in 2012, which was partially attributed to the city playing host to the World Curling/Summer Games. Since 2015, event visits have increased considerably from 22,277 in 2013 to 28,497 in 2015.

![Figure 6. Number of Event Visitors to Lethbridge by Market Segment (Source: EDL, 2015)]
5.3.3 Chinook Country Tourist Association Visitor Information Centre

Recent data (2015) from the CCTA indicate that visitation to the Lethbridge Visitor Information Centre (VIC) has been on slow decline over the last few years (as is the case with many VICs globally), primarily due to online trip planning and the availability of information while traveling. In contrast, the Executive Director of the CCTA notes that National & Provincial Parks VICs in proximity to the region are still seeing strong numbers.40

Visitation data for the March to October period of 2014 can be summarized as follows:

- About 50% of Lethbridge VIC visitors indicated that the city was their primary destination
- Approximately 21% indicated that the southern Alberta region was their primary destination (and not necessarily the City of Lethbridge). However, the 21% of visitors who visited southern Alberta stopped at the VIC
- Anecdotal evidence is suggesting that 2015 is emerging to have a notable decline in numbers of people into the VIC. In June 2014, there were about 6,300 visitors year to date compared to 5,600 visitors year to date in June 2015. It should be noted, however, that in 2015, the VIC started closing on Sundays, which has impacted data collection & visitor numbers.

Highway routing through and around or past Lethbridge impacts travel routing intentions. Highway I-95 from California is the main travel route to Alaska (i.e., travellers from Minnesota and region cut across, then North, pass through Montana and then through Lethbridge and the region). The location of the Lethbridge VIC has been reported as being an issue. The VIC was originally positioned on the edge of the city when it was built in 1985; however, since then, the city has built up around it. In addition, the lack of signage and routing causes some travellers to completely miss the VIC. The current location is near the intersection of several highways, but it can be a long diversion for some travellers to get to the VIC. Banff, Lake Louise, and Drumheller receive similar visitor types; however, an increasing percentage of people entering the VIC are locals gathering information for ‘visiting friends and relatives’. The CCTA has noted an increase in amenity migration seekers looking to retire, send their children to post-secondary institutions, or start businesses (often obtaining information through the Choose Lethbridge EDL site).

5.3.4 Stakeholder Interviewee Data

Most of the interviewees indicated that the majority of the visitors coming to Lethbridge are local or within a 70-80 kilometre drive. Some of Lethbridge’s more popular events including Whoop-Up Days and the Lethbridge International Air Show have brought in visitors from further afield. The city has successfully drawn in tourists from neighbouring provinces (e.g., British Columbia and Saskatchewan), along with attracting tourists from the United States and overseas. While these events have been successful at drawing visitors in, many of the interviewees indicated that they are not the main reason why visitors come to the city. Visiting friends and family along with sporting events were consistently mentioned as the main reasons why people visit the city.

Regarding the length of a typical visitors’ stay, there was general agreement among interviewees that many of the visitors typically stay for 1–3 days. Demographics ranged from young adults and children visiting for a tournament or an event to older people looking to explore the attractions such as Fort Whoop-Up, the Galt Museum, the Nikka Yuko Japanese Garden, or an event or festival.
Highlights on Visitation to Lethbridge

• Tourism in Alberta is growing and projections predict continued growth.

• The Alberta South Tourism Region represents 14% of overnight person-visits, and 14% of total person-visits to Alberta and 9% of total provincial visitor spending.

• The majority of visitation to the region originates in the southern Alberta region and from Calgary.

• About 39% of visitation included at least one overnight stay with 26% made by Calgarians and 21% by visitors from the southern Alberta region.

• In 2015, the majority of Lethbridge’s visitors came for a sports event or competition, about 57% of total visits.

• Approximately 51% of travellers to the southern Alberta region visited friends and relatives, 39% came for pleasure, and 4% for business.

• Direct spending by all tourists in southern Alberta was approximately $734 million.

• Wayfinding and travel information impacts travel routing intentions.

• An increasing percentage of VIC patrons are locals gathering information for Visiting Friends and Relatives (VFR) and amenity migration.

• Festivals, events, and sport tourism are significant draws for Lethbridge.

• Interviewees reported that many of the visitors to Lethbridge typically stay for 1–3 days.
5.4 Tourism Experiences & Resources

A tourism experience happens at the intersection of local people, local culture and local geography. Planning for Lethbridge’s tourism future needs to begin by taking stock of the city’s current visitor experiences and the resources on which they are founded. Tourism resources are the natural and built assets and infrastructure that facilitate positive visitor experiences within the settings and landscapes in which they occur. Collectively, these tourism resources are Lethbridge’s competitive advantage. Retaining and enhancing the quality and integrity of the city’s resources is essential to today’s and tomorrow’s tourism industry.

Visitors from near and far want to explore the unique, the exotic and the unexpected when visiting a destination. The tourism market place is fierce and destinations need to differentiate themselves, using their unique visitor experiences and tourism resources, if they are to gain market share.

5.4.1 Experiences

Lethbridge offers visitors a wealth of tourism experiences. Whether it be attending or participating in a regional tournament or a national championship sporting event, attending business conference at one of the city’s conference centres, visiting one of the city’s parks and natural areas in the river valley, enjoying a popular festival such as Whoop-Up Days, being cultured in the Galt Museum or experiencing the beauty of the Nikka Yuko Japanese Garden or simply base camping in Lethbridge while touring around the region, Lethbridge offers an experience for anyone.

The diversity of tourism experiences can be categorized as follows:

- Sport Tourism
- Business Travel
- Leisure Travel including:
  - Festivals & Events
  - Nature-based Adventure & Eco-Tourism
  - Cultural, Heritage & Arts Tourism
5.4.2 Tourism Resources

Assets

Sport Tourism

With approximately 46 sport facilities, Lethbridge is a major player in this growing industry. Its features range both in size and in type of sport event they are able to host. The 1st Choice Savings Centre for Sport and Wellness is a prominent feature in the city, hosting a variety of events including university basketball and judo, track and field and artistic gymnastics. As shown in Figure 7, sport tourism features are distributed widely throughout the city; some of the parks in the western reaches of the city including Nicholas Sheran Park and Peenaquim Park have and continue to support Lethbridge’s sport tourism industry. Peenaquim Park is home to the Softball Valley which has hosted a number of large multi-day softball tournaments including a national event in 2009 and 2015. The park is also home to the Lethbridge Fish and Game Shooting Sports Facility, which hosts competitions, police training and recreational shooting.

**Sport Tourism...**

Is the intersection between sport and tourism. Sport tourism is any activity in which people travel to a particular location, outside of their home town, as a sport event participant, an event spectator, or to attend sport attractions or business meetings (CSTA) should this be a reference. Sport Tourism is one of the fastest growing segments of the tourism industry. Canadian Sport Tourism Alliance. (2014) 43

Henderson Lake, one of the city’s most treasured natural assets, offers boat launching and fishing opportunities. The area also contains facilities that support a number of larger sporting events including the Henderson Lake Golf Course, Henderson Outdoor Pool, Spitz Stadium, and Henderson Park Ice Centre. A number of other facilities including the University of Lethbridge Community Sports Stadium, ENMAX Centre, Nicholas Sheran Arena, Lethbridge BMX Track, and Max Bell Regional Aquatic Centre, among others, have and continue to host a number of significant provincial and national sporting competitions. These competitions bring in a number of visitors and are largely responsible for the city’s sport tourism success.
To better understand Lethbridge’s capacity to host sport tourism events, the capability of each sport facility and the level of play of event it can host was determined (see the results to the left). By far, the city’s supply of sport facilities is best positioned to host provincial and national level events. To date only 3 of the city’s 46 sport facilities have hosted large scale international events.

Lethbridge has hosted a multitude of different sport tourism events in its sport facilities. Events occur in every month of the year and range from regional judo competitions at the Lethbridge Kyodokan Judo Club, to regional rodeos, to national events such as the 2012 National Women’s Basketball Championship at the Val Matteotti gymnasium at the Lethbridge College, to international events such as the 2012 World Curling Championship at the ENMAX Centre. Eighteen of the city’s sporting facilities can host provincial events; for example, Henderson Lake Golf Club recently hosted a girls and boys provincial golf tournament. The city’s sport facilities regularly host local and region tournaments and championships such as the Canadian Junior Little League Championship at Spitz Stadium. The city has also hosted large scale games including the 2012 Alberta Summer Games but recently lost the 2019 Canada Winter Games to Red Deer. The city has not hosted any mega events since the 1975 Canada Winter Games.
$51 million  Predicted total economic impact of sport tourism in Lethbridge (2011–2015)

$5.2 million  Budget invested in hosting sporting events (2011–2015)
Economic Impact of Sport Tourism in Lethbridge

Sport tourism is growing rapidly in Canada. Data from the Travel Survey of Residents of Canada and the International Travel Survey found that visitor expenditures associated with sport tourism reached $5.2 billion in 2012, up 5.3% from 2011. 43

Spending on sport tourism is occurring across visitor markets; as of 2012, 84% of all spending was from the domestic market followed by the overseas markets (10.8%) and US visitors (5.3%). The 5.3% growth in sport tourism revenues in 2012 surpassed the overall increase in tourism demand which increased 4.2% from 2011 to 2012. In addition, given the growth in sport tourism, it accounted for 6.3% of overall tourism demand in 2012, or 6.5% when considering sport tourism’s share of domestic tourism demand. 43 Unsurprisingly, given the growth in sport tourism revenues from 2011 to 2012, visitation also increased by 1.6% during this time. The increase in Canadian sport tourism travellers was attributed to the large surge in the volume of overnight visitors, growing by almost 11% in one year.43

At a more local level, sport tourism continues to be an important part of Lethbridge’s economic and tourism picture enticing many visitors to the city. While comprehensive statistical tracking is not yet been done, we do know in 2015, tracked sporting events attracted 15,769 visitors according to Lethbridge Sport Council estimates. The large volume of visitors in 2015 was a result of the city hosting the 2015 Skate Canada International, along with a number of provincial basketball and gymnastic events. The large volume of visitation in 2015 alone resulted in over $16 million in direct, indirect and induced spending according to the Sports Tourism Economic Assessment Model (STEAM). Between 2011 and 2015, multi-sport, international, national, provincial and regional sport events are predicted to have generated nearly $51 million in total economic impact (STEAM). Approximately $5.2 million was budgeted to secure, organize and deliver the events. As such, for $1 invested in organizing and delivering the events, $10 was generated in total economic impact. Events hosted between 2011 and 2015 are predicted to have attracted 17,518 participants and 34,534 out of town spectators (STEAM). Facilities such as the under construction Crossings Leisure Complex (scheduled to open in 2016) will enable the city to host even more large scale events such as the World Curling Event. This facility, and others like it, will continue to contribute to the city’s rising sport tourism sector.

91% of respondents agreed that Lethbridge should be able to host major recreation and sporting events (Lethbridge Recreation & Culture Master Plan).

Sports Tourism Economic Assessment Model (STEAM)

The STEAM model was developed in 2002 by Sport Canada, Canadian Tourism Commission, Canadian Tourism Research Institute, Canadian Association of Convention and Visitors Bureau to provide a credible and accessible model to predict the economic impact of sport events. Results from STEAM are predictions and may or may not represent actual economic impacts.
Business Tourism

In general, business tourism is comprised of two major elements:

- Business Travel
- Business Events

Business travel is travel for the purposes of carrying out business. The expenses associated with the travel are paid for by the business at which the traveller is employed.

A business event typically includes a formally scheduled program and a specific business objective for all attendees. Business events typically include at least 10 participants, last at least 4 hours and take place at a contracted venue. It typically includes any meeting or event where people gather to grow brand awareness, educate constituents, enhance business development, and bring products to market and so on. Business events are typically categorized into the following coarse segments: Meetings, Incentives, Conventions and Exhibitions (MICE).

Though a local destination typically cannot directly influence business travel, the destination can take steps to directly influence the attraction and hosting of business events. There are 27 business event spaces in Lethbridge capable of hosting meetings, incentives, conventions and exhibitions. These spaces vary considerable in their size and capacity (see Figure 8). Most of the business events spaces are hotels with associated gathering and meeting rooms. Business event spaces and travel spaces include:

- Accommodations (e.g., hotels, conference centres)—11 of the city’s hotels including Coast Hotel, Holiday Inn, Lethbridge Lodge Hotel and Conference Centre, and Sandman Hotel provide over 47,000 square feet of meeting space. Combined, these 11 hotels can accommodate 2,565 persons in their event space.
- Seasonal accommodations with meeting space—the University of Lethbridge and Lethbridge College, when combined, provide an additional 85,000 square feet of meeting space. The University of Lethbridge can accommodate 2,000 people and Lethbridge College can accommodate 1,000 in their event spaces.
- Additional buildings/facilities—the city’s business travellers are not limited to the meeting spaces offered at the traditional accommodations (e.g., hotels, motel etc.) of the post-secondary institutions. There are ten additional sites that provide meeting space including the Dr. Foster James Penny Building, ENMAX Centre, Fort Whoop-Up, Exhibition Park, the Paradise Canyon Golf Resort and the Southern Alberta Art Gallery, among others. These sites, combined, offer 184,319 square feet of meeting space to accommodate the needs of the city’s business travellers. Each site has different event space capacities; however, when combined, they can accommodate 4,540 persons in the event spaces.

When understanding the city’s supply of facilities to attract business tourism, it is important to note that the city does not have a large scale centralized convention and trade centre. However, Lethbridge Exhibition has developed concept plans and is pursuing the development of such a facility which has been identified by stakeholders as a significant priority.

316,319 square feet of meeting space can be accommodated in Lethbridge
Figure 8. Business Travel Features and Meeting Space Capacity
**Business Travel** includes travel for the purpose of business, versus leisure, and whose travel expenses are paid by the business the person works for.

**Business Event** includes any meeting or event where people gather to grow brand awareness, educate constituents, enhance business development, and bring products to market and so on. Business events are include at least 10 participants, last at least 4 hours and take place at a contracted.
Business events comprise a small percentage of overall visitors to Lethbridge. In 2015, 1,315 visitors came to Lethbridge for a business event; this was up from 515 in 2014. However, the 1,315 business event visitors only made up 5% of the total event visitors in 2015 (see Figure 6).

As shown in Figure 9, the economic impact of business event visitation in 2015 was $981,500. While this was a 94% increase from 2014, it only constituted 6% of total economic impact across the three segments (sports, business, and SMERF).

Figure 9. Economic Impact by Market Sector (Source: EDL, 2015)

As presented through the data above and through stakeholder interviews, business travel is minimal in Lethbridge but does have the potential to grow particularly with focus on smaller business events and meetings associated with the city’s and region’s major industries.
Festivals & Events

From Whoop-Up Days, to Lethbridge Arts Days, the International Air Show, International Peace PowWow and the Farmers’ Market, Lethbridge clearly recognizes the tremendous benefits that events and festivals bring to its communities, businesses, identity, and way of life. Since 1897, Exhibition Park has been the city’s primary venue for hosting tradeshows, Farmers’ Markets, midways and rodeos, Ag Expo, and Children’s Festival to name a few. The Whoop-Up Days Family Festival is one of Lethbridge’s most popular events, drawing in visitors from around the region and southern Alberta. In 2007, the festival saw a record-breaking attendance of 69,964. A more recent survey completed by EventCorp in 2010 collected feedback from attendees for five consecutive days (August 24 to 28, 2010) finding that:

- The average age of attendees was 31.4 years, with a median of 27.4 years
- About 77% were from Lethbridge with 45% residing south of Lethbridge and 24% between Calgary and Lethbridge
- Attendees stayed for an average of 1.5 days
- About 22% were first time visitors while returning attendees averages 4.8 years at Whoop-Up Days.

Overall, visitors to Whoop-Up Days were content with their visit with 49% rating their experience as good and 28% rating it as excellent.

Beyond the popular Whoop-Up Days, a number of events are held in downtown Lethbridge. An important part of the city’s Heart of Our City Master Plan is to revitalize the downtown to make it exciting and vibrant. As part of revitalization, the Heart of Our City committee has created a Heart of Our City Activity Grant that provide the City of Lethbridge funds to help local organizations host events that contribute to downtown vibrancy. Events are held throughout the year and they range in purpose, length, and audience. For example, Lethbridge Arts Days is a week-long celebration that brings together arts from a variety of disciplines who present their work to the public in a free, accessible and inclusive event. The Electric Eye Music Festival is an independent music and arts festival with an objective to establish downtown Lethbridge as a destination for arts and culture. While each event and festival is unique from one another, they share a common purpose of providing an experience for everyone.
In a 2010 public survey of visitation to Whoop-Up Days, 49% of respondents rated their overall enjoyment at the event as “Good” and 28% rated it as “Excellent”

—EventCorp Services Inc.
Nature-based, Adventure, & Eco-Tourism

With approximately 85 nature and eco-tourism features across Lethbridge, visitors are offered a chance to get close to nature. With a number of picnic areas, horseshoe pits, lookout points, parks, lakes and other natural features, visitors have no shortage of opportunities for passive recreation, socializing, and a break from urban life. Some of the city’s parks, including Henderson Park and Nicholas Sheran Park, offer residents and visitors a chance to enjoy a variety of recreational opportunities including walking trails, playgrounds for children, and picnic areas for social activities. 49

One of the city’s more valuable natural and eco-tourism assets is the river valley—a truly extraordinary natural valley that is 1.6 km wide with its banks reaching over 300 feet in height. As a natural area, the river valley contains a profusion of shrubs and trees and provides a migratory pathway and a wildlife habitat in the heart of the city. 50 As shown in Figure 10, there is a clustering of nature and eco-tourism features found within and near the river valley, making it a perfect location for visitors interested in having this tourism experience.

The river valley also contains a number of other natural features that have been registered in the spatial inventory including the Helen Schuler Nature Centre where visitors can have a dynamic urban interpretive nature experience, or enjoy the passive and active recreational opportunities offered by Cottonwood and Pavan Parks. Alexander Wilderness Park and Elizabeth Hall Wetlands spans over 250 hectares and is sheltered on one side by coulee cliffs and bordered on the other side by the Oldman River. As a preservation area, visitors have opportunities to learn about various plants and animals or engage in recreational activities such as walks, hikes, or social gatherings around the park’s picnic areas. 51 While the river valley is one of the city’s most magnificent natural areas, some of the stakeholder interviewees explained that it is not promoted effectively to visitors and as a result, is missed by many.

“the provision of quality parks and open spaces can have significant economic benefits which include increased property values and tourism potential.”

—Recreation & Culture Master Plan
Figure 10. Nature-based, Adventure, & Eco-tourism Features
Cultural, Heritage & Arts Tourism

Lethbridge is rich in culture, history and the arts. As discussed in previous sections, the city’s history is eclectic and the many stories that have shaped its identity—from early Indigenous settlement to coal mining and irrigated agriculture—act as tourism attractions today. With 22 different cultural, heritage and arts features (see Figure 11), the city has a mix of features supporting an emerging arts sector. Most of these features are concentrated in the city downtown core. The Southern Alberta Art Gallery, which has international recognition for exhibiting contemporary work, offers visitors a variety of exhibitions and art programs for all ages. 52 The University of Lethbridge Art Gallery contribute significantly to the city’s artistic flare carrying over 13,000 art objects including works from Canada, America and Europe. Galt Museum and Archives is a vibrant gathering place that meets historical, cultural and educational needs. Casa offers southern Alberta’s only interdisciplinary arts centre providing opportunities for arts education and learning. 53 Meanwhile, the city’s local arts organization, the Allied Arts Council of Lethbridge, promoted 357 unique events/programs in 2015 and works with 54 different art organizations that delivery art programming to the community.

There are two prominent heritage features that speak to the city’s history: the Lethbridge Viaduct, more commonly referred to as the ‘High Level Bridge’, and Fort Whoop-Up. The High Level Bridge, the longest and highest steel railway bridge of its kind in the world, was erected in 1909 and continues to be used by the CPR. 54 The bridge symbolizes the great settlement and development of Western Canada and was pivotal earlier in the city’s history for transporting coal safely across large distances. 55 Fort Whoop-Up, a replica of the original whiskey trading post, offers visitors a chance to learn about the city’s Indigenous history and of the fur-traders. Located in Indian Battle Park—the site was home to the last great battle between the Cree and Blackfoot tribes. 56, 57 With interpretive tours, galleries, events and family packages, Fort Whoop-Up has and continues to attract many different types of visitors, especially those interested in the city’s history and culture.

Head-Smashed-In Buffalo Jump

Waterton Lakes National Park
Did you know...
The University of Lethbridge holds of the most significant art collections in Canada? Numbering over 13,000 objects, the holdings include works from Canada, America and Europe, spanning the 19th and 20th centuries, and continues to grow today with 21st century additions.

Figure 11. Cultural, Heritage & Arts Features
Regional Tourism Assets

Lethbridge is southern Alberta’s tourism gateway. Recognizing that the city is a jumping off point for travellers to the region, it is important to consider what tourism experiences visitors can easily access from the city. Lethbridge’s central location is one of its greatest competitive advantages for tourism and there are many popular tourism attractions found in the larger region—Canadian Badlands, Crowsnest Pass and Waterton Lakes International Peace Park—that bring in visitors from around the province, across Canada, and from overseas.

Using the Government of Alberta’s Recreation and Tourism Features Inventory (RTFI), over 470 tourism features exist within a 150 kilometre drive of the city. 150 accommodation features exist in the larger region, including many camping options such as Writing-on-Stone Provincial Park, campgrounds in the Castle Proposed Provincial Parks, Park Lake Provincial Park, Daisy May Campground, and Covered Wagan RV Park.

Meanwhile, some of the more popular features the region’s only World Heritage Site, Head-Smashed-In Buffalo Jump—the only feature of its kind offering insights into the traditional hunting methods practices by the First Nations of the North American plains for close to 6,000 years. Visitors can check out Writing-on-Stone Provincial Park, found in the spectacular Milk River Valley which contains the largest concentration of First Nation petroglyphs and pictographs on the great plains of North America. And, visitors can easily access the multitude of nature-based, adventure and eco-tourism experiences in the Crowsnest Pass and Castle region. The Castle Wilderness has recently been designated as a new protected area with focus on enhancing its nature-based, adventure and eco-tourism experiences.
The larger region surrounding Lethbridge contains some of Alberta’s most treasured tourism attractions including Head-Smashed-In Buffalo Jump, a UNESCO World Heritage Site that offers a truly unique experience for those interested in the region’s Aboriginal history.
Tourism Infrastructure

Accommodations

The majority of the city’s 20+ accommodation features are hotels and motels, which contain approximately 1,631 guest rooms distributed across the city (see Figure 12). The University of Lethbridge and Lethbridge College, combined, offer another 200 guest rooms for visitors.

While the city’s hotels and motels offer most of the guest rooms, many of the stakeholder interviewees commented on how accommodations within the city could be improved, especially if the city wants to attract more visitors in the future. Interviewees noted that some visitors have noted that the quality of the hotels and motels could be improved and that the diversity of accommodation options should be enhanced. Other interviewees commented on how many of the city’s hotels are 3 stars, which may not be sufficient for attracting certain business travellers. It was noted that the limited supply of accommodation can be exacerbated when the city hosts major sporting competitions and events where demand often outpaces supply.

Beyond the city’s hotels and motels, accommodation diversity is limited. For example, the only accommodation supporting camping and recreational vehicles (RV) is the Bridgeview RV Resort. Interviewees highlighted the importance of camping and RV accommodations and how their limited supply is hindering the city’s tourism potential. Numerous interviewees explained how some visitors, who travel to the city in their RV for a sporting event, have expressed concerns about the lack of Camping / RV opportunities. Camping is one of the most popular leisure activities for Albertans with over 40% of residents taking part in overnight camping as a leisure activity. Over three quarters of camping trips are taken using an RV. In general, the trend in camping activity in Alberta is on the rise, and given Lethbridge’s appealing river valley there is potential to enhance camping opportunities in the city. Presently, demand for RV campground is high and is not being met.

As shown in Figure 12, the city’s accommodation features are mostly concentrated in the central-east along Highway 5 (Mayor Magrath Dr. South) from 4th Avenue South to 24 Avenue South. The map shows the lack of accommodation features in the western, northern and southern portions of the city. Some stakeholders noted that west Lethbridge will require more amenities and accommodations in the future as it continues to experience the city’s fastest population growth. As the city continues to grow, so should the quality and diversity of its accommodation options.

Accommodations by the Numbers

20 Hotels/motels in the city
1,631 Guest rooms
1 RV park
“Presently, RVers stop in Lethbridge and, often, the best camping spot for them is the Wal-Mart parking lot!”

—Stakeholder Interviewee
Accommodation Performance

When analyzing the status of the city’s accommodation sector, attention is also focused on evaluating the accommodation sector’s key performance metrics:

- Occupancy percentages
- Average daily rates
- Revenue per available room (RevPAR)

Lethbridge’s performance is benchmarked with similar communities across Canada to provide comparative context.

Occupancy Rates

After setting a record high in 2013 (62%), the 2014 occupancy percentage in Lethbridge decreased to 58.4% in 2014, ending a three year upward trend. Despite this decrease, the 2014 occupancy percentage measure represents the mean over the last nine years. After experiencing either the highest or 2nd highest annual occupancy percentage measure since 2011, Lethbridge fell to the 4th highest measure among the comparative cities in 2014, which represents its lowest comparative measure since at least 2006. All cities experienced increases over their 2013 measures except Lethbridge and Kamloops.

Figure 13. Occupancy Rates
Average Daily Rate

Lethbridge has seen an increase in its average daily hotel rate since 2006. At $110.37 in 2014, the Lethbridge ADR increased from $108.65 in 2013, extending its upward trend to four years. In 2014, Lethbridge had the 3rd highest ADR measure of the six comparative cities.

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lethbridge</td>
<td>82.23</td>
<td>87.91</td>
<td>100.05</td>
<td>102.46</td>
<td>100.61</td>
<td>102.42</td>
<td>107.00</td>
<td>108.64</td>
<td>110.37</td>
</tr>
<tr>
<td>Red Deer</td>
<td>91.02</td>
<td>95.13</td>
<td>99.00</td>
<td>106.17</td>
<td>102.11</td>
<td>104.05</td>
<td>107.53</td>
<td>109.75</td>
<td>112.34</td>
</tr>
<tr>
<td>Moncton, NB</td>
<td>107.99</td>
<td>110.24</td>
<td>117.52</td>
<td>117.81</td>
<td>116.27</td>
<td>115.43</td>
<td>115.88</td>
<td>112.20</td>
<td>113.77</td>
</tr>
<tr>
<td>Sault Ste Marie, ON</td>
<td>83.62</td>
<td>87.74</td>
<td>89.98</td>
<td>90.80</td>
<td>100.94</td>
<td>102.76</td>
<td>104.35</td>
<td>105.48</td>
<td>103.60</td>
</tr>
<tr>
<td>Brandon, MB</td>
<td>79.21</td>
<td>82.58</td>
<td>85.00</td>
<td>91.64</td>
<td>95.45</td>
<td>99.09</td>
<td>96.23</td>
<td>98.40</td>
<td>96.92</td>
</tr>
<tr>
<td>Kamloops, BC</td>
<td>82.44</td>
<td>87.05</td>
<td>96.65</td>
<td>100.11</td>
<td>97.01</td>
<td>98.79</td>
<td>102.42</td>
<td>104.03</td>
<td>105.57</td>
</tr>
</tbody>
</table>

Figure 14. Average Daily Rates
Revenue Per Available Room (RevPAR)

After setting a record high in 2013 ($67.40), Lethbridge RevPAR dropped to $64.45 in 2014, ending a three year upward trend. Despite this decrease, 2014 Lethbridge RevPAR represents its second highest measure over the last nine years by a notable margin. As shown below, the decrease in Lethbridge RevPAR was due to its decrease in its occupancy percentage; ADR increased, but not enough to offset the decrease in occupancy percentage. After holding the second highest measure of the six comparative cities over the last three years, Lethbridge was surpassed by Red Deer for the first time since 2006, and ended 2014 with the third highest RevPAR measure of the comparative cities. Moncton had the higher measure (as always). All comparative cities experienced increases over their respective 2013 measures except Lethbridge and Kamloops.

Figure 15. Revenue per Available Room

Amenities

To better position Lethbridge as a hub in southern Alberta, the city needs to ensure that it can provide a range of amenities that appeal visitors who are travelling to the city or travelling through it en route to another destination. As the service centre for southern Alberta, Lethbridge provides visitors all necessary amenities. The city’s 3,000 plus tourism amenities include food services, major banking and financial services, retail and shopping, hospitals and health care, entertainment, vehicle rentals, and the Lethbridge Visitor Information Centre. There is a good mix of high end, mid-range and franchise food chains in Lethbridge.
Access

As shown in Figure 16, the city is easily accessible for travellers from Alberta, Saskatchewan, British Columbia and Montana via Highway 2 (QEII), Highway 3 (Crowsnest Highway), Highway 4 and Highway 5. Visitors can travel to the city by bus transportation with Greyhound Canada and Red Arrow Motor Coach who provide daily trips Canada-wide and to Calgary and Edmonton, respectively. 

Figure 16. Access
Easily accessible by car and bus, the city is also accessible by air via regular flights with AirCanada into the Lethbridge County Airport. A report prepared by LPS AVIA Consulting conducted a financial assessment and governance review of the Lethbridge County Airport. The report contains a number of findings outlining the airport’s key strengths and areas for improvement. In Section 6.1 of their report, an analysis is presented comparing the Lethbridge airport with three other airports that have similar strategies and governance models. Table 2 below provides a summary of what was found.

**Table 2. Comparative Analysis—2011**

<table>
<thead>
<tr>
<th>Airport Characteristics</th>
<th>Lethbridge</th>
<th>Kamloops</th>
<th>Nanaimo</th>
<th>Fredericton</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (2011)</td>
<td>87,388</td>
<td>92,882</td>
<td>149,686</td>
<td>50,535</td>
</tr>
<tr>
<td>Operator</td>
<td>County of Lethbridge</td>
<td>Kamloops Airport Ltd.</td>
<td>City of Nanaimo</td>
<td>Greater Fredericton AA</td>
</tr>
<tr>
<td>Governance Model</td>
<td>Municipal Department</td>
<td>Commission</td>
<td>Commission</td>
<td>Airport Authority</td>
</tr>
<tr>
<td>Longest Runway (ft)</td>
<td>6,500</td>
<td>8,000</td>
<td>6,600</td>
<td>8,005</td>
</tr>
<tr>
<td>Scheduled Passenger Carriers</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Largest Scheduled Aircraft (seats)</td>
<td>Dash 8-300 (50)</td>
<td>B 737-800 (166)</td>
<td>Dash 8-300 (50)</td>
<td>CRJ (50)</td>
</tr>
<tr>
<td>Passenger Movements</td>
<td>56,994</td>
<td>219,461</td>
<td>386,000</td>
<td>273,968</td>
</tr>
<tr>
<td>Aircraft Movements</td>
<td>21,593</td>
<td>35,757</td>
<td>32,446</td>
<td>104,643</td>
</tr>
<tr>
<td>Revenues</td>
<td>$1,654,408</td>
<td>$1,514,185</td>
<td>$2,359,925</td>
<td>$7,176,760</td>
</tr>
<tr>
<td>Expenses</td>
<td>$2,371,238</td>
<td>$1,671,204</td>
<td>$2,485,227</td>
<td>$5,561,144</td>
</tr>
<tr>
<td>Surplus/Deficit</td>
<td>-$716,830</td>
<td>-157,019</td>
<td>-$125,302</td>
<td>$1,615,616</td>
</tr>
</tbody>
</table>

As shown in Table 2, Lethbridge has the opportunity to enhance its performance related to financial management, passenger movements, aircraft movements and in surplus/deficit. Stakeholder interviewees also confirmed that enhanced air access to the city will be key to achieving the city’s tourism potential. Interviewees sited the infrequency of flights to and from Lethbridge and the airport’s limited ability to accommodate larger carriers as the key inhibitors to growth in tourism especially business travel.
5.4.3 Regional Tourism Settings

As illustrated in Figure 17, travellers to the city have easy access (150km) to the full range of tourism settings—from the highly developed urban areas of Lethbridge to remote and relatively pristine backcountry. While front-country settings are the most dominant setting in the region, reflecting the region’s agricultural history, visitors can access the backcountry settings of the Porcupine Hills and Milk River Ridge which provide any backcountry adventurer with an opportunity to camp, take pictures of nature, appreciate wildflowers, or enjoy an afternoon bird watching. The easy access to a diversity of tourism settings helps position Lethbridge as a natural “jumping off” point to deliver the full diversity of visitor experiences.

Figure 17. Tourism Settings
5.4.4 Regional Scenic Resources

As illustrated by the Government of Alberta’s Scenic Resource Assessment, southern Alberta offers a unique and appealing visual quality. The South Saskatchewan Regional Plan acknowledged the importance of maintaining the region’s visual quality and a desire to develop scenic byways that enable visitors to experience the region’s impressive landscapes.

Visitors to Lethbridge have easy access (150 km) to areas with very high and high visual value. As shown in Figure 18, many of the natural areas in proximity to the city, including the Porcupine Hills, the Milk River Ridge, the lands surrounding Waterton Lake National Park and the majority of land south of the city, are rated as the highest visual value. Overall, these areas contain valued landscapes with scenic areas most sensitive to visual impacts. The landscapes that make up these areas are visible from major and scenic travel corridors and recreational areas. When driving from Lethbridge to the region’s most popular tourism attractions such as Waterton Lakes National Park, Head-Smashed-In Buffalo Jump, Frank Slide Interpretive and Writing-on-Stone Provincial Park, visitors have the opportunity to view beautiful and relatively undisturbed landscapes.

Legend

- Very High
- High
- Moderate
- Low
- Very Low

Figure 18. Visual Value of Area Surrounding Lethbridge
“Today’s destination brands require constant development, management, and vigilance to ensure that their brand essence is protected as much as its story is loved. Brands are a synthesis of perceived community, industry, and marketplace realities. Shaping them into an authentic and compelling compilation of experiences and stories takes leadership and vision, as well as the ability to engage both internal and external audiences to develop the destination’s future. DMOs must play a shared leadership role in managing their destination brands. This transforms the DMO role from tourism transaction broker between the marketplace and the industry to one of destination manager synthesizing the needs of the community, the marketplace, and the industry into a rich destination experience.” (pg. 19).
5.5 Brands, Marketing & Media

5.5.1 At a Glance

Lethbridge’s brand essence is currently hard to easily define as messaging is inconsistent and scattered among many different platforms. A destination’s brand is what helps differentiate it from other cities within Alberta and even Canada. And there are very unique experiences within Lethbridge which sets it apart, yet visitors should not have to dig for this information. Its many hours of sunshine, its ‘whoop up’ history with outlaws, its location as a hub for adventure and its historic, massive High Level Bridge, a feat of remarkable engineering which is the largest of its type in the world—all offer compelling reasons to explore Lethbridge further.

Today’s traveling consumer is looking for a destination’s brand essence via information that is easy to find and understand, along with compelling story telling (the why & the how). The goal is to drive consideration by consumers, a universal destination marketing KPI. By providing this information at various touch points (e.g., official websites, intuitive design for various technological applications, trip planner functions online, social media, e-newsletters which are seasonal, earned media strategy, visitor guides, and visitor centres) Lethbridge can build trust in its tourism brand while ‘out helping’ the competition by providing useful information for arranging a visit.
This is reinforced by Travel Alberta’s Consumer Path-to-Purchase (Figure 19) which should be integrated into Lethbridge’s marketing approach.

**Figure 19. Consumer Path-to-Purchase Model**

As well, it is important to spend as much effort on the “post journey” experience for consumers as it is on the “pre-journey”. This is where the power of social media—sharing experiences among friends and families—helps continue to build the ‘buzz’ and the brand. Once a traveller has experienced the quality and diversity of experiences within Lethbridge and the surroundings, as long as their experiences are good ones, they can become a brand ambassador.
Currently, Lethbridge is being marketed as a tourism destination by a number of different organizations which may cause confusion. One of the overarching goals of the Destination Management Plan is to bring consistency and synergy between the marketing and brand messaging that is found online and through other collateral materials. While having multiple organizations promoting the city via their websites and social media—which helps with search engine optimization—credibility and trust are lost if the information is not consistent, not reliable and dated. A multitude of important visitor information is spread across various sites. Lethbridge’s brand as a tourism destination would be better served if this visitor information was easily found within one location.

5.5.2 A More In-depth Look

Travel Alberta

Travel Alberta’s powerful web presence uses provocative language when showcasing Lethbridge, which entices consumers to explore more deeply, and should be mirrored in all materials. Below is a good example:

*Picture a lawless 1869 whiskey trading fort patronized by shady characters of the Wild West… checklist: scoundrels, serenity, bridges, birds of prey, Whoop-Up Days, close to Head Smashed in Buffalo Jump—a UNESCO World Heritage site.* 65

Travel Alberta provides a strong overview of the region, placing Lethbridge as an easy to reach hub where many adventures can be found less than one hour away.

Lethbridge Lodging Association

The top online ranked by visitation site, behind Travel Alberta, for tourism information is the Lethbridge Lodging Association’s Visit Lethbridge. It makes sense that the focus of the site is the Where to Stay section which includes a book online feature. There is effective use of promo codes and “book now” for a strong call to action. There is also an events page and a blog titled Local Content, which provides further information about the destination. It is also easy to use, and the sliders of images are effective, providing a good sense of place. Opportunities exist to update social media content and ensure it is relevant and engaging.
The Chinook Country Tourism Association’s Explore Southwest Alberta

Explore Southwest Alberta offers a very professional and helpful visitor information page, managed by the CCTA. The focus of this site is the “Play” section, which includes links to events for families, festivals, cultural, shopping, and sports. Their site has an integrated contesting feature that they are currently using with Instagram and it promotes “Lethbridge Moments.” Overall, the CCTA has a solid digital strategy in place and Lethbridge will continue to benefit as it grows its online community.

Good examples of engaging content include the infographic “Fun Facts about Lethbridge” and Choose Lethbridge’s “mind blowing facts” which should be shared among all partners promoting Lethbridge as a destination. The guidebooks, available online as well, are also very comprehensive. The itineraries available on the “Tour Southern Alberta” section are helpful and inspirational and the CCTA does a great job promoting the region and variety of experiences for travellers coming to the area.

Canadian Badlands Ltd.

The Canadian Badlands Ltd. does a good job highlighting Lethbridge on its maps and helps visitors visualize all that is available within the region. Lethbridge should take advantage of this comprehensive site by highlighting it on its own visitor information pages and linking back to the multiple activities and suggested circle routes that are recommended.

Welcome to southwest Alberta—a place where the sun nearly always shines and the opportunity for adventure never ends.

Canadian Badlands Communities—don’t miss in Lethbridge:

- Bowman Arts Centre
- Galt Museum & Archives
- Fort Whoop-Up National Historic Site
- Helen Schuler Nature Centre
- Nikka Yuko Japanese Garden
- Southern Alberta Art Gallery
- Lethbridge Corn Maze
- Bridge Valley Par 3 Golf Club
- Evergreen Golf Centre
- Henderson Lake Golf Club
- Paradise Canyon Golf Resort
- Broxburn Vegetables & Café
- Casino Lethbridge
- Henderson Lake Park
- New West Theatre
5.5.3 Mining for Compelling Content

Alberta SouthWest

The language used in the Alberta SouthWest website is the most compelling for tourism. Examples include:

- 16 vibrant communities working together
- Sunny days and starry nights
- Warm Chinook breezes
- Breathtaking vistas

A reference to National Geographic and Economic Development Lethbridge’s site along with Wikipedia, also uncovered a number of stories which would help consumers along the decision-making journey:

- Windy climate makes Lethbridge’s lakes a sought after haven for kite and wind surfers
- Lethbridge gets 320 days of sunshine a year
- Lethbridge has the largest number of green certified homes
- Lethbridge as a sport tourism hub and welcoming location for meetings and events

Economic Development Lethbridge

As is often pointed out, a great place to visit is a great place to live and even invest. Travel and tourism, when managed effectively, enhances the quality of life for a local community as it provides jobs, brings in additional tax dollars for improvement of services and infrastructure and attracts experiences like restaurants, shops, festivals, cultural and sporting events—which cater to visitors and locals.

Economic Development Lethbridge markets the destination well, and its “Success in Lethbridge” site presents compelling information about Lethbridge into one easy to use site. It is also one of the few where Lethbridge’s knowledge capital through the University of Lethbridge, Lethbridge College and homegrown business success stories are highlighted.

A best practice in DMO marketing is highlighting a city’s knowledge capital, as a thriving workforce supports the very experiences visitors are seeking out—culinary, unique shopping, live theatre, festival, events. Linking into and sharing ED Lethbridge’s creative and marketing would be recommended as Lethbridge builds its tourism brand identify.

5.5.3.3 Wikipedia and Wikitravel

Wikipedia showcased valuable information that should be highlighted on Lethbridge’s other tourism information assets. For example, the fact that Lethbridge is one of the driest cities in Canada with the warmest winters in the prairies. It also showcased Lethbridge’s commitment to culture (as one of the Cultural Capitals of Canada 2004-2005), that a new community arts centre, Casa, was built downtown, and that there is a dynamic public arts program. All of this information including the fact that the Lethbridge Viaduct is the longest and highest steel trestle bridge in North America, and how Indian Battle Park commemorates the last battle between the Cree and Blackfoot First Nations in 1870—is well laid out and accessible.

However, not all potential visitors will turn to Wikipedia or Wikitravel Lethbridge as their most trusted source. This information needs to be highlighted within Lethbridge’s own tourism and visitor focused page (i.e., tell your own tourism story, your way) and it is recommended that all the information on Wikipedia and Wikitravel be reviewed regularly to ensure it is up to date.
5.5.4 What does Frommer’s Say?

Guidebooks—both hard copies and online—continue to be a trusted source for visitors. A search of authoritative guidebook sites showed the majority focused on the Lethbridge’s ‘notorious’ history as a reason to visit. Frommer’s describes Lethbridge as a “delightful garden city”, and “pleasant prairie city”. Fodor’s states Lethbridge’s main attraction is “Fort Whoop-Up”, a search in Rough Guides pulls up the title “The Cypress Hills Massacre and the Mounties” and the Lonely Planet states “there isn’t a lot to bring you to the city, copious parkland, a couple of good historical sites and an admirable level of civic pride might keep you longer than you first intended”.

Reviewing guidebook sites and updating editors on new additions, attractions and events is important to enable them to keep information online and up to date and also ensure reprints of hard copy guides are as up to date as possible. Working with Travel Alberta and regional DMOs to host guidebook editors is also a cost effective way to profile the depth and breadth of experiences available for visitors.

Frommer’s is a travel guidebook series founded by Arthur Frommer in 1957.
5.5.5 What is Missing?

As DMAI’s DestinationNext report points out, “DMOs are dynamic networks that play a unique role in the tourism ecosystem”. They have an intimate and personalized local knowledge, help create and curate a destination’s ‘sense of place’, and play an invaluable role in connecting people to businesses. The massive change in how travellers, travel influencers and meeting planners reach, choose and experience destinations makes it even more important for DMOs to be clear and consistent with how they market their unique attributes. In the review of the city’s brands, marketing & media, the following information was either downplayed or missing which is hindering the growth of Lethbridge’s tourism brand:

- Consistent messaging and links to partner sites
- Compelling image bank and media centre, to engage travel media
- Consistent social media strategy across partner sites
- Positioning of Lethbridge as the gateway to adventure and cultural experiences within the region
- Little information on significant assets such as wildlife viewing, how to engage with Indigenous culture, the area’s significant agricultural base, ranch and farm stay tourism
- Profile of the two UNESCO World Heritage sites within easy reach of the City
- Packaging among hotels and operators within the area
- Highlighting of festivals, events, farmers markets
- Consistent messaging which ties into the brand experiences identified by CCTA—journeys—real and personal, time, then and now, people—real, friendly and approachable
- The story of Lethbridge as one of the top cities in Canada to do business along with the innovation and creativity that comes with hosting a top university
- The story of Lethbridge’s water resources—and amazing irrigation system—agri-tourism
- Expansion of Lethbridge’s ‘dark side’, start of the NW Mounted Police and rich heritage that goes beyond re-enactments and showcases how it influenced the Lethbridge of today
- Easy to access story tips and image for travel media, to inspire earned media and visitation as part of a potential larger story
- Integration of Trip Advisor reviews and ratings which drives social proof from a trusted source.

The good news is that Lethbridge offers so much more to visitors than is being promoted consistently by its tourism partners and other information sources popular with visitors. This is the time for the city to take hold of its own tourism story and share it through all the multiple communications channels available.
Analyzing a destination’s social media traffic can yield meaningful insights into the visitor perceptions of the City and the tourism experiences on offer.
6. DESTINATION ANALYSIS

6.1 Visitor Voice

People use social media in many different ways and for many different purposes. Travellers often use social media to share their experiences with others through pictures and quotes. Social media allows visitors to share their perspectives immediately with their friends, family and colleagues. Analyzing a destination’s social media traffic can yield meaningful insights into the visitor perceptions of the City and the tourism experiences on offer. As social media is the fastest and most powerful form of marketing, analyzing the “big data” can also provide insights into the effectiveness of marketing efforts.

Social media traffic, from the top social media platforms, was monitored over a 1.5 month period in the summer (August 1st to September 15, 2015) and winter (December 15–January 24, 2016). Traffic on nine social media platforms were observed including Blogs, Facebook, News Sources, Reddit, Tumblr, WordPress, YouTube, and Google+ (see Figure 20).

The top 3 social media platforms, based on total activity, were:

- Twitter = 978 summer tweets & 1,067 winter tweets
- News Sources = 1,066 summer posts & 610 winter posts
- Facebook = 1,084 summer posts & 216 winter posts

However, tourism related posts accounted for only 2.11% of total social media posts in the city (2.79% of total winter posts and 1.5% of total summer posts). Tourism in Lethbridge is not being featured in social media activity. There is significant room to grow the impact of social media based tourism marketing.

The social media analysis was used to identify where visitors stay and what they do while visiting the City. As illustrated in Figure 20, sports topics were the most popular posts across most social media platforms.

Tourism in Lethbridge is not being featured in social media activity.

Big Data by the numbers...

- 4,072 summer social media posts
- 3,260 winter social media posts
- 64 summer posts were tourism related
- 91 winter posts were tourism related
6.1.1 Visitor Attractions

Analysis of social media traffic confirmed that travellers who are using social media are visiting a diversity of attractions and events. The most popular included:

- **Accommodations**—University of Lethbridge
- **Events**—Fort Whoop-Up Days, Casa, Jazz Festival and Lethbridge Electronic Music Festival
- **Nature-based Adventure & Eco-tourism**—the river valley, Galt Gardens and the Oldman River
- **Arts, Heritage and Culture**—The Lethbridge Slice Bar & Grill and Lethbridge High Level Bridge
- **Sports**—Both the University of Lethbridge and Lethbridge College had the most “sports” related posts at 752 and 538, respectively

As shown in the pictures adjacent, visitors to Lethbridge experienced a wide variety of activities, events, and attractions. Posts ranged from visits to the city’s popular attractions like Nikka Yuko Japanese Gardens and the Galt Gardens, to exploring Henderson Lake, to stumbling across and being amazed by the High Level Bridge, and experiencing the excitement and energy from Whoop-Up Days. Overall, the High Level Bridge and sporting events were featured most often in summer and winter social media posts.
Overall Sentiment

The majority of the social media posts about the city were positive, as shown in Figure 21 below. Visitors would commonly use the following words in describing their experiences: growth, excited, rich, fun, love, winning, better, and like. Negative sentiments were far less common and when they were mentioned, they were simply negative words being used to express an idea and less on the overall experience. Many of the “negative” terms found in the social media analysis did not relate to a tourism experience.

![Figure 21. Sentiment Analysis](image)

“Had an AWESOME time at the Whoop Up Days Parade today with some amazing volunteers. Thanks to Courtnay, Shelley, Ted, Eric, Clayton, Alyssa, Genna and Scott for helping make it happen. A huge thank you to Blair Gallant and Michele Gallant for bringing Fringe Theatre to Lethbridge!”

—Sample social media post
The CP Holiday Train appears to float in the fog as it travels across the iconic High Level Bridge in Lethbridge, AB. Photo credit Neil Zeller Photography.
https://www.facebook.com/HolidayTrain/photos/a.10150336120913495.353675.34176138494/101534532191894/?type=3&theater

Did you know? The Lethbridge River Valley is home to a number of animals including Western prairie rattlesnakes! In the 1960's the City of Lethbridge, Alberta began deliberately acquiring parkland in the River Valley for the sole purposes of preservation and public enjoyment.
www.greatplacesincanada.ca

I'm at Henderson Lake in Lethbridge, AB
swarmapp.com/c/89g4X9xAk9h

Andrew | Henderson Lake
Go out. Check in. Have fun. Download Swarm and turn every day into a game!
swarmapp.com
SWOT Analysis

Using the findings from the background secondary research, primary research (e.g., stakeholder interviews, tourism asset inventory, social media analysis, and the destination life cycle assessment), the Strengths, Weaknesses, Opportunities and Threats regarding tourism in the city were identified. This analysis constitutes the current and predicted drivers that will influence tourism in the city and have been considered in the preparation of this plan. Each of these key components are broken down by the following: Policy & Planning; Visitation; Visitor Experiences, Resources and Tourism Infrastructure, and Key Stakeholder Interview Findings.

**Strengths and Weaknesses** refer to matters inside the destination, ones that destination leaders can act on and control.

**Opportunities and Threats** are typically matters outside of the destination that destination leaders may not be able to act on or control.
### Strengths

#### Policy & Planning

- Investment in Sport Tourism infrastructure.
- Supporting partnership with Canadian Badlands Tourism Development Strategy.
- Strong local stakeholder interest in developing business events.

#### Visitation

- Strong and growing visitation for Sport Tourism.
- 50% of Lethbridge Visitor Information Centre visitors indicated that the city was their primary destination.
- Increasing percentage Visitor Information Centre visitors are locals gathering information for Visiting Friends and Relatives (VFR).
- Southern Alberta is attractive to Cultural Explorers and Free Spirits – Destination Canada, Explorer Quotient types.
- Strong local stakeholder interest in developing festivals, events, and the arts.

#### Visitor Experiences, Resources, and Tourism Infrastructure

- Range of cultural/heritage attractions in the city and adjacent region.
- Wide variety of regional activities and diversity of landscapes and tourism features in region. Unique physical settings.
- Primary transportation corridor situated close to popular tourism attractions (Waterton Lakes, Head-Smashed In-Buffalo Jump – a UNESCO World Heritage Site, Writing-on-Stone Provincial Park, Fort Whoop-Up).

#### Stakeholder Interviews

- Unique attractions e.g., Nikka Yuko Japanese Garden, the Galt Museum, and Fort Whoop-Up.
- American tourists tend to stop in the city on their way to Alaska.
- The Lethbridge Sport Council is viewed as a model of good governance for tourism.
- Lethbridge has one of the largest park systems in Canada.
- Post-secondary institutions and the growing number of young families settling in the city are stimulating travel by visiting friends and family.

### Weaknesses

#### Policy & Planning

- Lack of sufficient resources for conducting market research (i.e., average visitor spend).
- Need to enhance cooperation with regional and provincial tourism & development organizations.
- Accommodations sector is lacking coordination and cohesive collaborative strategy - providing limited data; quality & service needs to align with visitor expectations & competition.

#### Visitation

- Visitation to the Lethbridge Visitor Information Centre has been in slow decline over the last few years.
- Lack of a Conference Centre mitigates visitation.

#### Visitor Experiences, Resources, and Tourism Infrastructure

- Lack of awareness of region and of existing attractions/activities.
- Lacking brand differentiation of city compared to competition.

#### Stakeholder Interviews

- The conferences and conventions that currently occur in the city are unable to grow larger as the facility space does not permit them to.
- The story of the region’s Indigenous peoples (the Blackfoot Nation) is generally not known, despite the fact that it is right at our doorstep.
- The city’s coal history and the story of the magnificent High Level Bridge are also not well known.
- One of Lethbridge’s largest weaknesses in its accommodation offering is the lack of RV and camping opportunities.
- Poor wayfinding and signage.
- Poor marketing of why visitors would be interested in coming to Lethbridge.
- With so many organizations involved in tourism currently, there are many different brands all with different marketing.
### Opportunities

**Policy & Planning**
- Europeans moving away from travel intermediaries towards more independent travel with increasing access to information through the Internet.
- Opportunity to build upon policy & planning support in alignment with Canadian Badlands Association and Travel Alberta strategy as a primary destination hub.
- Outreach program for visitor surveys is a cost-effective research opportunity.
- Opportunities for cross-promotions with other regional DMOs in higher-visitation communities.
- Growth in amenity migration (retirement, new/small businesses), and education-related tourism.

**Visitation**
- Ready, available market of free independent traveller (FIT)/Intrepid travellers.
- Sizable and growing provincial & regional market.
- Residents from Alberta accounted for 87% of visitation to Southern Alberta.
- It can cost more for an Albertan to travel to the US; therefore, some travellers might feel inclined to travel locally or regionally.
- Growing interest in Indigenous tourism.
- US visitor interest starting to rebound (broader economic recovery and weaker Canadian dollar).
- Growth in participatory travel, festivals, events.
- National & Provincial Parks Visitor Information Centres in proximity to the region are still seeing strong numbers.
- International examples of other Visitor Information Centres turning themselves into multi-faceted attractions.

**Visitor Experiences, Resources, and Tourism Infrastructure**
- International travellers are looking for unique, authentic experiences to connect with the outdoors and nature and learn about local history-culture.
- Consumers seeking accurate and understandable information about logistics and experiences.
- Scenic drives – in region and adjacent regions. Lakes, rivers – in region and adjacent regions.
- Farm markets, agricultural tourism, culinary tourism.
- Cultural-Heritage and Nature-Outdoor recreation activities may be packaged to correlate with complimentary market segment interests. Packaging tourism events and activities may extend the average length of stay for tourists.

**Stakeholder Interviews**
- Given that we border one of the largest [Indian] reserves in North America, there is a lot of heritage and culture to share from the Indigenous people.
- One way to improve Indigenous tourism in the city would be to construct a Blackfoot Cultural Centre.
- There is significant demand for RV parking from visitors to the city – including those on their way to Alaska.
- Need to leverage technology to provide wayfinding and visitor information.
- The city can be a “jumping off” point to many of the popular regional attractions that are within a half-day drive.
- The River Valley has the potential to become a major tourism attraction and the River Valley Parks Master Plan could assist in these efforts.

### Threats

**Policy & Planning**
- Broader economic recovery is still subject to macro-economic shocks and factors such a fuel prices, currency exchange, and travel visas, all of which can all influence travel decisions.
- Research and reporting is provided for broader southern Alberta Region, therefore future evaluation and monitoring will be hampered until we can secure regional data.

**Visitation**
- Economic impacts due to down-turn in provincial energy sector.
- Shortened consumer booking cycles makes demand potentially more variable.

**Visitor Experiences, Resources, and Tourism Infrastructure**
- Consumers expecting high levels of service and sophisticated products.
- Competitive destinations (e.g., Canmore, Banff and Jasper) are well funded and organized.

**Stakeholder Interviews**
- Airline capacity and frequency is an issue.
- Lethbridge is losing events to other urban centres like Calgary, Red Deer and Saskatoon that have the facilities to accommodate business travel.
- It is important for Lethbridge to have an identity where it can champion a major event/festival that gives the city the reputation it deserves.
6.2 Destination Life Cycle Analysis & Market Readiness

Destinations have a lifecycle. The destination is continually evolving. In accordance with Butler’s Destination Lifecycle Model, destinations transition through a consistent cycle with distinct stages. Each stage of the cycle brings different characteristics. The experiences on offer change, available amenities and accommodations evolve, visitors and visitor origins change, ease and type of access changes and market share grows. To inform the development of strategies and priority initiatives, it was important to understand where each of the visitor experience themes provided in the city were on the destination lifecycle. Guided by Butler’s criteria (see Table 3), professional opinion was used to approximate the lifecycle stage for each visitor experience theme.

Table 3. Destination Life Cycle Stage Characteristics

<table>
<thead>
<tr>
<th>Life Cycle Stage</th>
<th>Market Share</th>
<th>Visitation</th>
<th>Activities &amp; Attractions</th>
<th>Employment</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exploration</td>
<td>Unknown</td>
<td>Low</td>
<td>Few – Owned &amp; Operated Locally</td>
<td>Little to no local employment in tourism.</td>
<td>Limited</td>
</tr>
<tr>
<td>Involvement</td>
<td>Unknown</td>
<td>Low</td>
<td>Lacking Critical Mass – Owned &amp; Operated Locally</td>
<td>Limited local employment in tourism.</td>
<td>Improved</td>
</tr>
<tr>
<td>Development</td>
<td>Known – Short &amp; Long Haul</td>
<td>Moderate - High</td>
<td>Diversifying</td>
<td>Growth in local employment in tourism.</td>
<td>Good</td>
</tr>
<tr>
<td>Stagnation</td>
<td>No Growth</td>
<td>Plateaus – Exceeding Carrying Capacity</td>
<td>Aging – Declining Appeal</td>
<td>Levelling off of local employment in tourism.</td>
<td>Maximized – Too much access</td>
</tr>
<tr>
<td>Decline (unless efforts made toward rejuvenation)</td>
<td>Decline</td>
<td>Decline</td>
<td>Decline in Quality</td>
<td>Declining employment in tourism.</td>
<td>Maximized – Too Much</td>
</tr>
</tbody>
</table>
Table 4. Destination Life Cycle Stage Characteristics by Visitor Experience Theme

<table>
<thead>
<tr>
<th>Visitor Experience</th>
<th>Destination Characteristics</th>
<th>Market Share</th>
<th>Visitation</th>
<th>Activities &amp; Attractions</th>
<th>Employment</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature-Based Adventure, &amp; Eco-tourism</td>
<td></td>
<td>Some awareness with short haul markets</td>
<td>Moderate</td>
<td>Lacking Critical Mass – Owned &amp; Operated Locally</td>
<td>Little to no local employment in tourism.</td>
<td>Good</td>
</tr>
<tr>
<td>Sport Tourism</td>
<td></td>
<td>Well Known</td>
<td>High</td>
<td>Diversifying</td>
<td>Growth in local employment in tourism.</td>
<td>Good</td>
</tr>
<tr>
<td>Events &amp; Festivals</td>
<td></td>
<td>Known – Short &amp; Long Haul</td>
<td>Moderate</td>
<td>Diversifying</td>
<td>Growth in local employment in tourism.</td>
<td>Good</td>
</tr>
<tr>
<td>Cultural, Heritage &amp; Arts Tourism</td>
<td></td>
<td>Known – Short</td>
<td>Moderate</td>
<td>Diversifying</td>
<td>Limited local employment in tourism.</td>
<td>Good</td>
</tr>
<tr>
<td>Business Travel</td>
<td></td>
<td>Some awareness with short haul markets</td>
<td>Low</td>
<td>Lacking Critical Mass – Owned &amp; Operated Locally</td>
<td>Growth in local employment in tourism.</td>
<td>Poor</td>
</tr>
</tbody>
</table>

Figure 22. Lethbridge Destination Life Cycle Assessment
Future media headlines: As envisioned by members of the tourism committee...

“Tourism industry in Lethbridge reaches $3 billion in revenue”

“Lethbridge hosts Travel Alberta Conference in new Convention and Trade Centre and wins national award”

“Lethbridge recognized as well rounded perfect sized city for multiple opportunities for visitor experiences”

“Lethbridge is the destination of choice for sport and convention opportunities”

“Airport now has better connectivity to the world with Dash 300 now covering 2 of the 6 flights out per day”

"Lethbridge two week Fringe Festival attracts 100,000 visitors"
7. THE WAY FORWARD

7.1 Vision

IMAGINE... by 2026, Lethbridge will be...

*Southern Alberta’s premier destination for sport tourism and business event hosting. Visitors from across Canada and the world who come to Lethbridge, whether it be for sport, business or leisure travel, will experience the city’s authentic nature, arts, culture, heritage and Indigenous stories. In addition, the city will be an appealing regional gateway and accommodations hub serving visitors to the Canadian Badlands, Crowsnest Pass and Castle. The city’s unified tourism brand is being consistently marketed to target markets and the tourism industry is strongly embraced by residents who recognize the positive economic, social and environmental benefits it provides. The city’s tourism champions are unified and collaboratively focused on growing new visitation to the city, expanding tourism investment and effectively managing the destination.*

7.2 Outcomes

To achieve the city’s new tourism vision, the city will:

Experiences

- Be recognized as one of Alberta’s premier sport and business event hosting destination
- Grow its role as a regional gateway and hub for the Canadian Badlands and Crowsnest Pass and Castle destinations
- Increase leisure travel experiences featuring the city’s history, arts, culture, nature, adventure and eco-tourism opportunities

Economic Growth and Diversification

- Increase year-round visitation by target markets
- Increase the length of time visitors stay in the city
- Increase the visitor spending and total economic impact to the city from tourism
- Increase private and public sector investment in tourism projects
- Increase community and stakeholder support for tourism in the city

Unified Destination Governance & Management

- Establish a unified and effective destination leadership model
- Maximize the positive benefits tourism brings to the city while minimizing the negative social, cultural and environmental impacts
7.3 Markets of Greatest Potential

The most successful destinations focus on understanding who their best visitors are, where they come from, what these visitors want to experience and how best to communicate with them to compel them to visit. Understanding and focusing on the visitor is one of the most important aspects of destination management planning. Visitors to Lethbridge are diverse as are their expectations, attitudes, motivations, behaviours, and willingness to pay for a tourism experience. Similarly, not all visitors bring the same degree of benefits to host communities. Attracting visitors is not about attracting any visitor. It’s about attracting the right visitors. Visitors will travel to a destination if it provides the right experiences. Providing the right experiences begins with knowing the right visitor.

Understanding the markets of greatest potential differs depending on the type of travel that is being considered. Markets of greatest potential are presented in the following sections for sport tourism, business events and leisure travel.

7.3.1 Sport Tourism Markets

Sport tourism continues to be an important part of Lethbridge’s economic and tourism picture. Lethbridge Sport Council has been highly involved in attracting sporting events to the city. From 2011-2013, the combination of 14 different sporting events held in the city generated over 120 jobs and contributed about $5.7 million to the city’s GDP. Over this time period, these select sporting events resulted in $12 million in total economic impact.

The Lethbridge Sport Council leads initiatives to create and promote sport tourism opportunities in Lethbridge. The LSC Sport Tourism Committee identifies sport tourism opportunities and events, and develops business and tourism partnerships. The LSC Sport Bid Committee works in conjunction with the Sport Tourism Committee and supports the preparation of sport bid packages. The LSC is mandated to lead local sport tourism initiatives, including research, collaboration, education and promotion. LSC and their Sport Tourism Committee work in collaboration with:

- Economic Development Lethbridge
- City of Lethbridge
- Lethbridge Lodging Association
- Chinook Country Tourism Association
- Lethbridge Chamber of Commerce
- University of Lethbridge
- Lethbridge College

Other partners of the Lethbridge Sport Council may include: Lethbridge school divisions, Exhibition Park, local sport clubs, Alberta Sport Development Centre Southwest, and Lethbridge County.
According to the Canadian Sport Tourism Alliance (CSTA), there are six sport tourism market segments (see Figure 23):

- **Competitive Single Sport Event:**
  The type of event that can most easily be included in a sport tourism strategy is a competitive, single sport event, either international (world or North American championship), national championship, provincial championship, or regional championship.

- **Multi-sport Events**
  These can be very large due to the number of sports being hosted at one location at the same time. These can be directed by governments e.g., Canada Games and AB Games, or by separate organizations, e.g., the International Olympic Committee or the North American Indigenous Games.

- **Invitational Events**
  There are many invitational events hosted by community organizations (e.g. slowpitch tournaments, curling bonspiels). They tend to be local in their orientation, although at slightly higher competitive levels in some sports, the “tournament” is the way that athletes are introduced to higher levels of play.
Invitational events can therefore be of enormous scale: some youth soccer tournaments can have thousands of participants. As with local championship events, techniques to maximize the “tourism” component need to be developed.

Created Events
Created events are generally invitational events that are custom designed to serve a specific purpose. They are increasingly used in the United States for a tourism purpose. An example might be a combination of low hotel occupancy and low arena usage at the end of the hockey season leading to a hockey tournament being created. An e.g. the “Golden Oldies” tournaments that are sponsored by Air New Zealand that focus on masters-level participants. The events are held in New Zealand or in a city to which Air New Zealand flies. There is always potential for creating events to fill specific niches, but the logistics rely on finding volunteers to organize the events which can be a problem outside of the normal sport organizational structures.

The size and value of a sport tourism event varies based on:
• Number or participants
• Number of spectators
• Length of event
• Frequency of event
• Calibre & status of event
• Event legacies
(CSTA – Sport Tourism Planning Template)

Non-Competitive Events
There are a wide range of non-competitive events that can fit into a sport tourism strategy:
• Sport conferences and meetings – sport governing bodies have annual general meetings and many other meetings to discuss everything from rule changes to drug policies. Some of these meetings are open for bid, especially for larger sports and organizations, but many are simply set by the board.
• Training courses and clinics – athlete training, team preparation, spring training.

These are often organized by the sport governing bodies, but can also be privately organized by individuals or by colleges and universities. Non-competitive events are key parts of the sport tourism industry and involve participants’ spending time in other cities on hotels and related tourism expenses.

Professional Sport Events
Professional sport teams tend to serve a local market for spectator entertainment. They do bring visiting teams and spectators to town, and contribute to the economic health of the community in the process.

Sport tourism events are organized into a hierarchy based on their level of play and catchment (Hosting International Sport Events in Canada – A Proposal for a Strategic Framework (2003):
• Level 1 – Major International Events (Multi or Single Sport)
• Level 2 – Small International Events
• Level 3 – National and Provincial Events
• Level 4 – Intra-Provincial and Open Events
• Level 5 – Local Events
The magnitude of sport tourism is influenced by the number of participants and spectators, the length and frequency of the event, the calibre and status of the event (Olympics vs local minor hockey tournament), the demographics catered to, and event legacies (i.e. facilities, funds for scholarships, etc.). It should be noted that although larger, less frequent and more publicized events have a higher profile, the critical mass of activity in the industry occurs at the intercommunity level.

Lethbridge is positioned to attract:
- Multi-sport games
- Championships
- Professional/Post-Secondary Sport Events
- Tournaments
- Cause & Created Events
- Non-competitive sport events
- Spectator sporting events

At the following levels of play:
- International
- National
- Provincial
- Intra-Provincial / Regional
- Local

For the following sports:
- Softball
- Baseball
- Soccer
- Lacrosse
- Rugby
- Golf
- BMX
- Moto-cross
- Archery
- Swimming
- Basketball
- Hockey
- Curling
- Gymnastics
- Figure Skating
- Volleyball
- Ringette
- Judo
- Synchronized Swimming
- Football
- Slowpitch
- Speedskating
- Martial arts
7.3.2 Business Tourism

Like the sport tourism and leisure tourism sectors, growing business tourism needs to begin with an understanding of the market segmentation. In general, business tourism is comprised of two major elements:

- Business Travellers
- Business Events

Though terminology is used interchangeably, recent research and literature show that both the business travel and the business events market sectors have been further segmented to include the following.

Business Traveller Segments

Business related travel occurs for many purposes which, for simplicity, can be grouped into the following six categories:

- Customer visits
- Sales and marketing
- Internal meetings
- Employee training

Understanding the expectations of business travellers is crucial. Most business trips (42%) last 1–2 days while 26% are about 2–4 days. Recent research by the Global Business Travel Association, has led to segmentation of business travellers. The study identifies five segments of business travelers in the market today: The Veteran (33%), Road Weary (25%), Wide-eyed and Anxious (21%), Passionate High-Tech (14%) and New Recruits (7%). Each traveller type is different based on the travel goals, trip duration, demographics, travel experience, use of technology and number of trips taken.

Characteristics of the Business Traveller

- The average business trip lasts four days and costs $1,837 USD.
- Business travellers tend to be 38 years old on average, college-educated (71%), and male (59%).
- Majority of business travellers report there is no substitute for being there in person (78%), and enjoy traveling for work (78%).
- Almost half of business travelers report that staying in touch on the road with family and friends (46%) and staying safe (46%) while traveling are the most important goals on trip.
- Nearly half (46%) have to work under tight budgets, putting pressure on their travel plans.
The Veteran – The Most Experienced
Take an average of 12 trips per year with an average of four nights away from home per trip; (88%) are 35 years of age or older. They are typically older travellers who have no problem with managing travel, handling arrangements and keeping track of expenses. The most important goal identified by Veteran travellers is ensuring they are not hindered by a lack of equipment of connectivity showing a high receptiveness to new technology for more productivity on the road. This group enjoys traveling with almost all (94%) bringing laptops on the road to stay in touch with those back home.

Road Weary – Frequent and More Reluctant
Take, on average, 15 trips per year with an average of three nights away from home per trip; majority are older in age with (74%) being older than 35 years of age. The most important goal to Road Weary travellers is feeling safe when on trip (42%) and staying in touch with family (41%). Road Weary travellers are most likely of all traveller groups to bring a portable GPS on trip.

Wide-eyed and Anxious – Less Frequent Travellers Who Experience Travel Challenges
Take, on average, 11 trips per year with an average of four nights away from home per trip; typically younger travellers, (89%) are less than 55 years old. In general, Wide-eyed and Anxious travellers are younger travellers with less experience on the road, these travellers tend to enjoy travel but get nervous navigating new destinations and following policies.

Passionate High-Tech – Enthusiastic Travellers and Early Adaptors of Tech
Take, on average, 13 trips per year with an average of four nights away from home per trip; almost all younger travellers with (91%) less than 54 years old. They are passionate High-Tech travellers who love to travel for work and look to technology to make them more productive and stay in the know with their friends and family. Likely to spend more per trip and fly to their destinations. Passionate High-Tech travellers embrace new technologies such as tablet devices (25%) while on the road.

The New Recruits – Less Experienced Travellers Who Want to Share their Adventures
Take, on average, 14 trips per year with an average of six nights away from home per trip; the youngest group with (98%) less than 54 years old. Generally this group of younger travellers is eager to explore new destinations while on business and are eager to travel more and share experiences, often using social media to meet up with friends and other colleagues on the road. They are likely to do more international travel and work in the computer technology industry.
Unlike business travel where the destination is usually fixed, business event organizers have a choice in potential destinations.

Business Event Segments

Business events include at least 10 participants, last at least 4 hours and take place at a contracted venue. In Alberta, the business event segment accounts for close to 30% of total tourism expenditures in the province and directly supports 30% of Alberta’s tourism jobs. In 2012, the province hosted about 15% of Canada’s total Meetings, Incentives, Conferences and Events Industry (MICE) events, attracting about 300,000 international participants and accounting for 1.8% of the province’s GDP.

Unlike business travel, where the destination is usually fixed, business event organizers have a choice in potential destinations. It is important to understand and design purposeful strategies to respond to business event organizer preferences. Business events include:

- **Meetings**—events where participants attend educational sessions, participated in discussions, social functions and other organized events. Meetings do not have an exhibit component.
- **Incentives**—Businesses utilize exceptional travel experiences to motivate and / or reward employees for increased levels of employment in support of the businesses goals.
- **Conventions**—gathering of delegates, members or representatives of a membership or industry organization convened for a specific purpose. These commonly include educational sessions, committee meetings, social functions and conduct business and governance of the organization. Conventions are typically recurring events with set timing. There may be an exhibit element to a convention but it is a secondary objective.
- **Exhibitions**—Events at which products, services and promotional materials are displayed to attendees visiting exhibits on the display floor. These events focus primarily on business to business relationships though consumers may also be allowed to attend on certain days.

Collectively, the business event types above form the well-known MICE business tourism sector. However, other business events should also be acknowledged including:

- **Trade Shows**—Business to Business events including exhibitions of products or services held for members of common or related industries. These are not open to the public or consumers.
- **Congresses**—the regular coming together on a representational basis of several hundred, or even thousands, of individuals belonging to a single professional, cultural, religious or other group. Congresses are typically convened to discuss a particular subject. The frequency is typically annually or multi-annually.

Due to terminology differences between North America and Europe, at times there are similarities between the business events listed above (e.g. trade shows and exhibitions, congresses and conventions). However, there are also differences.

Business Travel Trends

One of the leading business tourism trends is “bleisure”. Bleisure is the blending of business and leisure travel. Recent research found that 60% of those surveyed had taken bleisure trips with close to half adding personal travel days to most trips, and 55% brought their family or significant other with them. About 83% of respondents used time on business trips to explore the city they visited. The report found that the top reason for bleisure travel is the desire to see the world and gain cultural experiences.
For those who engaged in leisure while on a business trip, the most popular activities included:

- Sightseeing
- Dining
- Arts and culture
- Outdoor activities
- Experiencing the city’s night life

One of the most salient findings is that 94% of younger travellers are “more than” or “equally” likely to take a bleisure trip in the next five years, which is significantly higher than the worldwide average. More bleisure trips can result in extended stays in the city and increased visitor spending.

Professional blogs about MICE have summarized the following key trends in business events:

- Events are becoming “communities”. The life-cycle of an event begins with the planning stages to engage with participants early in the process and may carry on afterwards
- Technology is changing business events with increasing use of mobile applications to connect attendees such as Bluetooth Low Energy and iBeacon; iBeacon allows mobile apps to connect users more effectively

Events that blend business and leisure and leverage community and regional attractions before, during, and after events are proving to be popular

- The supply of locally produced “Farm to Table” foods and beverages provide unique and sustainable experiences for participants and differentiates destinations
- Smaller group meetings and incentive trips are emerging for organizations to provide client appreciation and recognition of employees
- Affordability will continue to play a role in selecting a business event and conference destination

Travel Alberta’s 2015 MICE guide appropriately presents Lethbridge as the “right size” destination for MICE planners, large enough to provide all the necessary business amenities yet small enough to easily get around the city. Lethbridge is positioned as a more affordable destination for business events, than other business event destinations such as Banff, Jasper, Calgary and Edmonton. In addition to business event hosting, the city offers compelling regional attractions, a cosmopolitan experience, and beautiful green space.

As a smaller venue, Lethbridge is well positioned to leverage emerging trends in business tourism. Closer coordination of local business events stakeholders would assist meetings planners with securing more cost-effective venues. Blending business and leisure activities, including highlighting local and regional attractions and ‘farm to table’ offerings could better differentiate the destination. Utilization, standardization, and sharing of technology platforms amongst local business event stakeholders and venues would assist in realizing cost-efficiencies and enhance communications across the city and for event delegates.

**Bleisure**—blending business and leisure travel.

- About 20% of travellers have not taken bleisure trips but would like to
- About 78% of respondents agree that adding leisure days to business travel adds value to work assignments
- Six out of 10 respondents are more likely to take bleisure trips today than they were five years ago
- Approximately 73% of travellers feel bleisure opportunities benefit them as an employee
Hosting a business event, what do you need to know?

According to research, a destination needs to provide the following to be attractive to business event and conference organizers:

• Consistent Branding
• Family (& Friend) member activities
• Event center quality
• Offer a blend of leisure opportunities
• Accessibility
• Affordability
• Amenities (e.g., WiFi)
• Access to popular attractions
• Social Spaces
7.3.3 Leisure Travel

The City’s Target Leisure Travellers

One way to better understand the city’s markets of greatest potential for leisure travel is through the analysis of Destination Canada’s Explorer Quotient (EQ) traveller types. The EQ enables the destination to gain a deeper understanding of its appropriate target visitors. The EQ expands beyond demographics, preferred activities and length of stay to help the destination consider a visitor’s psychographics including, social values, travel values, experience appeal and travel behaviours. These deeper insights can help with better understanding what motivates target markets to travel.

Alberta Culture and Tourism previously identified Free Spirits and Cultural Explorers as the EQ types most likely to visit Alberta. This is positive for Lethbridge as the analysis reported that many of the existing and potential tourism products in the city are most likely to appeal to Free Spirits and Cultural Explorers. These target markets have been confirmed by other sources. In 2012, the Chinook County Tourist Association’s Southwest Alberta Regional Tourism Strategy identified Cultural Explorers as the primary target traveller type for the region and Free Spirits as the group more specifically interested in the attractions, festivals, and events in Lethbridge. In addition, Free Spirits had been identified as a secondary target for more niche product offers in the region.

Considering the current and potential visitor experience mix and the characteristics of the region, the city’s primary target traveller types are Cultural Explorers and Free Spirits.
Cultural Explorer

The following attributes describe characteristics of Cultural Explorers:

• Try new things & learn, hands on learning, getting to know locals, beautiful scenery & active adventure, travel as a time for escape
• Immersive
• Activity amongst beautiful scenery – parks & historic sites
• Not overly structured
• Connection to social responsibility (EQ Bootcamp, 2014)87

The Cultural Explorer tends to value spontaneity, cultural sampling, and is open to trying and accepting new experiences. They are defined by their desire for constant travel and continuous opportunities to discover and immerse themselves in the culture, people and settings of the places they visit. They enjoy pursuing values such as novelty and tend to value personal control and personal escape. They are known for being creative, enthusiastic, open-minded, flexible, risk-taking, and tend to be interested in the following attractions: heritage sites, cultural events, museums, festivals, B&B’s, and hostels.

The Cultural Explorer makes up approximately 12% of the global market. There are more females than there are males (57% compared to 43%) and they have higher than average levels of education and income. About 28% of this group is 18-34 years of age, compared to 43% in the 35-54 age group and 30% being 55 years of age and older. With respect to life stage, about 34% are middle aged with no kids at home, compared to 27% living with their families and 19% being mature.

Alberta Culture and Tourism previously identified Free Spirits and Cultural Explorers as the EQ types most likely to visit Alberta. According to market analysis, Lethbridge is most appealing to Free Spirits and Cultural Explorers and as such, both groups have been identified as the primary target traveller types.

Demographics

- Education: Higher than average
- Employment: FT – lower than avg. % are retirees
- Household Income: Average
- Age:
  - 18–34: 28%
  - 35–54: 43%
  - 55+: 30%

Lifestage

- Families: 27%
- Middle Age no kids at home: 34%
- Young no kids: 20%
- Mature: 19%
Expectations & Travel Characteristics

Vacation Trend?
Take the most vacations of any EQ type, trips of all durations but focused more often on weekend escapes.

Travel Motivations?
- **Constant Travellers**: Always excited about the next trip
- **Living History/Culture**: Fascinated by the ancient history as well as the modern cultures of the places they visit
- **Fun, Shared Experiences**: Travel is a journey, not the destination, and is best experienced with like-minded companions who like to have fun while learning
- Feeling **relaxed and free** while travelling
- **New Destinations**

Most Interested in?
- Learning, exploring something new, sampling local flavours, local lifestyles, Indigenous culture, **beautiful landscapes, rivers/waterfalls, hiking/trekking, cultural attractions**, festivals, relaxing, self-touring
- Aside from walking and hiking, have little interest in outdoor activities

Most Avoid?
- **Luxury/Comfort Seekers**: This segment seeks an authentic experience and does not want to stay in sterile, commercial hotels
- **Check-list/Security**: While cautious, these travellers are not afraid to venture into the unknown in pursuit of discovery. They will not be constrained to “tourist” schedules or destinations but will chart their own courses.

Desired Accommodations?
- Small inns, B&B’s, camping, hostels and other accommodations that allows them to connect to other people

Seek Travel Information From:
- Internet (website, regional tourism sites)

Source: CTC Explorer Quotient Worksheets

Amongst EQ segments, Cultural Explorers had the highest chance of visiting rural Alberta. This is an important observation, as research and key stakeholder interviews have revealed that many visitors to Lethbridge and the Southern Alberta region are drawn in by attractions in relative proximity to Lethbridge including Waterton Lakes National Parks, Head-Smashed-In Buffalo Jump, and Writing-on-Stone Provincial Park. According to stakeholder interviewees, some visitors stop in Lethbridge for a brief visit and subsequently depart to visit the regional attractions. Visitors to rural regional attractions should be considered as potential target markets who may be targeted to visit Lethbridge.
Free Spirits

The following attributes describe characteristics of Free Spirits:

- Attraction for crowds, shared experience, indulgence, being the centre of attention
- Top sights
- Shared experience
- Indulgent & luxurious - resorts
- Adventurous
- Convenient – include all elements (equip, clothes) (EQ Bootcamp, 2014)

Free Spirits can be described as individuals who are always looking for exotic and exciting opportunities in high value accommodations and ventures. They do typically look for some structure and planning and tend to travel in groups, with friends, and are drawn to main attractions and shared experiences. While Free Spirits are identified as a primary EQ type for Alberta as a whole, they may not necessarily be the right fit for the current state of tourism development across rural attractions in the Southern Alberta region. However, in Lethbridge, the many festivals, events, and attractions better align with the interests of Free Spirits who are looking for experiences that they can tell their friends about.

Large attractors in Alberta like the Rocky Mountains and the Calgary Stampede are well known, and these visitors may not even know (or care) about the province itself. Free Spirits also have high expectations for the level of amenities and service in a destination, and they are not afraid to share their discontent if their expectations are not met.
Expectations & Travel Characteristics

Vacation Trend?
Greater number of all types of trips; more weekends; will combine business and pleasure.

Travel Motivations?
- **Vacations**: Greater number of all types of trips, more weekends
- **Fun Events**: Travel to spend time with friends, celebrate events
- **Destinations**: Travel in organized groups, stay with friends, in luxury hotels or hostels. Most likely to fly.
- **Information**: All sources, especially internet

Most Interested in?
- **Constant Comparison Travel**: Life is more exotic abroad, so travel is continuous and exciting.
- **Luxury/Comfort**: Aspire to stay in the most luxurious accommodations and venues
- **Checklist Samplers**: Want to see all the main attractions, but do not need to go into depth with any. High energy to see everything.
- **Exhibitionists**: Want to be the centre of attention. Attracted to groups and shared experiences.
- **New destinations**: Always looking for someplace new

Most Avoid?
- **Reluctant Travel**: Don’t want to wait at home, constant need to travel. The internet is no substitute.
- **Free & Easy**: Wants some structure and planning. Packages should include planned activities.
- **Upward Striving**: High Social Mobility and Entrepreneurialism inspire a strong sense of Personal Challenge.
- **Unsure of Goals**: Deterred by Time Stress, Aimlessness, Anomie and Fatalism, reflected in Acceptance of Violence
- **Social Lives Rule**: Craves Social Intimacy, Celebrating Passages and Attraction to Crowds. Sexual Permissiveness and Hedonism.
- **Flashy Consumers**: Need for Status Recognition drives Aesthetics, Ostentation, and Importance of Brand. Technophiles

Destinations?
- Travel in organized groups; stay with family/friends, in luxury hotels, or hostels.

Fun Events?
- Travel to spend time with friends and celebrate events.

*Source: CTC Explorer Quotient Worksheets*

Amongst EQ segments, even though Free Spirits had less likelihood of visiting rural Alberta, they were more likely to visit iconic attractions like Writing-On-Stone-Provincial Park, and attending attractions, festivals, and events like those more prevalent in Lethbridge. A significant number of attractions, festivals, events, and sport tourism in Lethbridge are in alignment with the travel interest, motivations, and behaviours of Free Spirits.89
Table 5 below summarized the differences in preferred tourism package components among Free Spirits and Cultural Explorers.

Table 5. **Target Market Preferred Package Components**

<table>
<thead>
<tr>
<th>Component</th>
<th>Free Spirits</th>
<th>Cultural Explorers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accommodations</strong></td>
<td>Often aspire to stay in the most luxurious accommodations and venues</td>
<td>Inns, B&amp;Bs, lodges and other accommodations that reflect the area's culture/personality such as home stays, farm stays, guest ranches</td>
</tr>
<tr>
<td><strong>Food and drink</strong></td>
<td>Like to be pampered while on vacation and have premium food and drink experiences</td>
<td>Unique dining experiences featuring local ingredients, tastings at wineries</td>
</tr>
<tr>
<td><strong>Activity or program</strong></td>
<td>Joy of Consumption: Free Spirits find shopping highly gratifying. A brand name on a product or service is an indicator of quality, style and status. Prefer special group packages for major sporting, entertainment, or other special events</td>
<td>Interactive, hands-on and immersive learning experiences Active adventure, nature and beautiful scenery Voluntourism Farmer's markets and small towns Wildlife viewing Cultural festivals and outdoor street performances Food-related factory tours</td>
</tr>
<tr>
<td><strong>Itinerary</strong></td>
<td>Prefer special group packages...they like things organized and like to be pampered</td>
<td>Unstructured-they like to chart their own course Allow time for spontaneity</td>
</tr>
<tr>
<td><strong>Transportation</strong></td>
<td>Customized, comfortable, luxury transportation options</td>
<td>Self-touring Small group shuttles</td>
</tr>
<tr>
<td><strong>Special</strong></td>
<td>Appreciate pristine nature along with some cultural and historical experiences</td>
<td>They enjoy a surprise! Access to WIFI for sharing on social media or email</td>
</tr>
<tr>
<td><strong>Avoid</strong></td>
<td>Comfort-Seeking: Free Spirits have a higher penchant for risk, so they are not afraid to try something new or have an adventure Reluctant travel: Not content to experience the world through the Internet or T.</td>
<td>Multi-day guided bus tours, golfing, hunting</td>
</tr>
</tbody>
</table>
Origins of Target Markets
Lethbridge and the southern Alberta region attract local, regional, and longer-haul Canadian and international travellers. The majority of visitation comes from the local region and greater Calgary; however, population numbers in the major centres of Alberta are projected to see major growth over the next 25 years, increasing the opportunity to attract these closest markets. Demand continues to be moderate to high for travellers coming from other parts of Alberta, British Columbia, Saskatchewan and adjacent US border states.\(^9^0\)

Longer-haul Canadian travellers (from central and eastern Canada) represent a strong opportunity to attract Cultural Explorers, who are interested in iconic rural attractions in our region, but using Lethbridge as a travel hub and service centre. Developing experiences attractive to Free Spirits will align with the types of attractions (festivals, events, sporting events) offered in the City of Lethbridge. These travellers typically stay longer and spend more than Albertan visitors.

International travellers exhibit interests similar to the longer-haul Canadians, while staying even longer and spending more than Canadian travellers. Given the increasing competition from other destinations (regional and global), the city’s tourism leaders will need work harder to attract the interest of longer-haul and international tourists. International markets are still emerging in the southern Alberta region; however, the city’s local culture and history – particularly our Indigenous culture and history – are of growing interest to these travellers. Furthermore, those longer-haul Canadian and international travellers who are interested in soft outdoor adventure activities are often also interested in Indigenous, cultural, and historical attractions. These sophisticated travellers hold higher expectations for quality travel experiences, requiring us to provide unique, authentic quality travel experiences to stand out from the city’s competition.

### Market Origins:

**Primary Markets:** Southern Alberta (staycations), Calgary, Edmonton, Central Alberta, Western Canada.

**Secondary Markets:** Rest of Canada,

**Western USA/Border States,**

**Emerging Markets:** Germany, Australia, USA, and the UK

### Table 6. EQ Profiles by Market Origin\(^9^1\)

<table>
<thead>
<tr>
<th>ORIGIN</th>
<th>FREE SPIRITS</th>
<th>CULTURAL EXPLORER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Canada</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>France</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Germany</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>UK</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>United States</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Mexico</td>
<td>10%</td>
<td>—</td>
</tr>
<tr>
<td>China</td>
<td>9%</td>
<td>—</td>
</tr>
<tr>
<td>Japan</td>
<td>12%</td>
<td>—</td>
</tr>
<tr>
<td>South Korea</td>
<td>11%</td>
<td>—</td>
</tr>
</tbody>
</table>
EQ Geographic Analysis

A request for data was submitted to the Alberta government to obtain data on the geographic distribution of Cultural Explorers and Free Spirits within the province. The request specifically asked for the distribution and concentration of these EQ traveller types around the province and the number of households by census subdivision (CSD). Ultimately, the purpose of this analysis was to understand which areas of the province Lethbridge could better focus its tourism marketing efforts to be more attractive to these EQ target markets.

These data are presented at the census subdivision level and provide information on the following:

- The number of EQ households in the census subdivision as a whole
- The number of EQ households as a percentage of total households in the census subdivision
- The penetration rate i.e., how much of the census subdivision population is made up of the EQ traveller type

Figure 24 presents the geographic distribution of Cultural Explorers in the province. The CSDs of St. Paul, Stettler, Rocky Mountain House, and Slave Lake all have a ‘very high’ concentration of this EQ traveller type combining for just over 5,000 households. CSDs with a ‘high’ concentration include Canmore, Edson, Bonnyville and Wetaskiwin. These data provide an indication of where the highest concentration of this EQ traveller type is, and therefore, where marketing efforts could be focused.
Figure 24. Concentration of Cultural Explorers in Alberta by Census Subdivision
As shown in Figure 25, the largest concentrations of Free Spirits in Alberta are found within Banff, Edmonton and Calgary. These three census subdivisions, when combined, contained over 234,000 Free Spirit households. Other CSDs including Tsuu T’ina Nation 145 (Sarcee 145) (AB), IRI, Brooks, Canmore, and Chestermere, have a ‘moderate’ level of Free Spirits households. From a marketing perspective, Calgary contains the highest number of Free Spirit households (145,697) and therefore is an excellent candidate to focus tourism marketing efforts to attract potential travellers to Lethbridge.
Figure 25. Concentration of Free Spirits in Alberta by Census Subdivision

<table>
<thead>
<tr>
<th>Census Subdivision</th>
<th>Number of EQ Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calgary</td>
<td>491,909</td>
</tr>
<tr>
<td>Edmonton</td>
<td>375,466</td>
</tr>
<tr>
<td>Banff</td>
<td>3,390</td>
</tr>
<tr>
<td>Canmore</td>
<td>5,672</td>
</tr>
<tr>
<td>Chestermere</td>
<td>2,072</td>
</tr>
<tr>
<td>Brooks</td>
<td>3,605</td>
</tr>
<tr>
<td>Tsuu T'ina Nation 145</td>
<td>560</td>
</tr>
<tr>
<td>(Sarcee 145)</td>
<td></td>
</tr>
</tbody>
</table>

- **% of Households**
  - Low (0–7%)
  - Slightly Low (8–10%)
  - Moderate (11–20%)
  - High (21–35%)
  - Very High (36%+)
7.4 Destination Strategy–Primary Travel Motivators

Though visitors travel to destinations for different many reasons, a primary travel motivator is the underlying motive responsible for compelling most travellers to visit the destination. Recognizing that the city is the largest urban centre, a regional gateway and provides the greatest range of air access options in southern Alberta, the city’s is uniquely positioned to focus on two primary travel motivators:

- Sport Tourism
- Business Events

The city will focus great attention on developing and prioritizing its sport tourism and business events sectors as a primary means of growing target market visitation.

However, the city is also blessed with a rich array of arts, culture, heritage, Indigenous and natural assets which provide opportunity to grow the leisure travel sector and extend the stay of sport tourism, business event and regional travellers. As such, the city will focus, as a second priority, on developing its leisure travel sector and its role as a regional gateway and hub for the Canadian Badlands and Crowsnest Pass and Castle destinations. Leisure travel experiences will be packaged with and pro-actively marketed to sport event participants and spectators as well as business event attendees as a convincing tactic to extend these travellers length of stay and spending.

**Primary Travel Motivators:**
- Sport Tourism
- Business Events

**Secondary Travel Motivators:**
- Leisure Travel
- Arts, Culture, Heritage, Indigenous, Nature

7.5 Unique Selling Proposition

Competition for visitors is becoming increasingly fierce. To compel travellers to visit, destinations need to clearly differentiate themselves from their competition. One way to do this is through the development of a purposeful and unique “destination position”. The destination position communicates the city’s unique selling proposition to visitors. Lethbridge’s unique selling proposition is as follows:

*Lethbridge is the gateway to southern Alberta. As the largest urban centre, Lethbridge is southern Alberta’s premier sport tourism and business event hosting destination. The city provides event organizers state of the art sport and business facilities with close and convenient access to the most compelling and unique visitor experiences in the Canadian Badlands, Waterton Lakes, and the Crowsnest Pass. An affordable event hosting destination, the city is large enough to provide all the necessary sport and business amenities yet small enough to easily get around. Come to Lethbridge for our sport and business events, but stay to experience our region’s authentic and memorable arts, culture, heritage and awe-inspiring nature.*

The position above is intended to be integrated into all tourism and marketing communications in the city.
What persuades a potential visitor to holiday in a particular destination is that destination’s ability to engage in unforgettable and truly inspiring experiences that touch visitors in an emotional way and connect them with special places, people and cultures.

—Hero Experiences, Queensland Tourism

7.6 Shifting Focus—The Visitor Experience

“A tourism product is what you buy; a tourism experience is what you remember.”

Regardless of whether its sport tourism, business events or leisure travel, the tourism industry is undergoing a shift in focus. The industry is undergoing its single most important shift... a transition away from selling products and services to a clear focus on selling engaging, authentic and memorable experiences. As tourism offerings move up the experience spectrum (see Figure 26), the city’s competitive position will increase allowing Lethbridge to achieve greater prices for its tourism experiences.

The city’s tourism industry is embracing this shift and is becoming acutely focused on delivering experiential sport, business and leisure travel. “Experiential travel engages visitors in a series of memorable travel activities that are inherently personal. It involves all senses, and makes connections on a physical, emotional, spiritual, social or intellectual level. It is travel designed to engage visitors with the locals, set the stage for conversations, tap the senses and celebrate what is “unique” in the city. Through experiential travel, the city can inspire visitation by creating experiences that connect travellers to the special places, people, culture and environment in Lethbridge.”

THE EXPERIENCES SPECTRUM

This diagram illustrates the process of moving from offering individual commodities, products and services to delivering compelling and engaging experiences.

Figure 26. Experience Spectrum (Tourism Queensland adapted from Pine and Gilmore, 1998)
7.7 Experience–Market Match & Gaps

In the simplest terms, visitor satisfaction depends on the ability of the destination to provide the right mix of visitor experiences to meet the demands of target markets. By contrasting the market readiness of the destination's experience mix with the demands of target markets, gaps in the supply of attractions, activities, amenities, accommodations, access and destination capacity can be identified and strategies to address the gaps prioritized. The following sections illustrate the current and potential strengths of the city’s sport, business and leisure tourism opportunities as well as the demands of sport, business and leisure tourism markets. The current strengths and the market demands are compared and gaps between market demands and the current strengths of the city are identified. The analysis illustrates where demands and strengths are matched. The results of this analysis were used to identify strategies and initiatives that would advance the ability of the city to meet the demands of its target markets. Specific attention needs to be paid to those moderate to high market demands that are currently moderate to emerging strength.

The following figures illustrate how the sport, business and leisure market expectations are contrasted with the city’s current sport, business and leisure tourism offering.
7.7.1 **Sport Tourism Market Match**

It is important to understand if the city is positioned to compete in the sport tourism market place. To do so, criteria related to the host destination from the CSTA’s Bid Evaluation Model (BEM) were applied as a guide to assessing sport tourism in Lethbridge in general. The BEM criteria allow destinations to assess their relative suitability and capacity to host particular sporting events. The BEM provides potential host communities with the information about how they can become a competitive and attractive destination to host a particular sport and it indicates what sport event organizers are looking for in a potential community.

Criteria related to the financial potential of individual events, competitive context and sustainability were not utilized in this assessment as they are event specific in nature versus host destination.
SPORT TOURISM

What are the market demands?

MARKET DEMAND

- High
- Moderate
- Low

CSTA BID EVALUATION CRITERIA

INFRASTRUCTURE ASSETS
- Sports Facilities / Venues
- Accommodation
- Food & Beverage Services
- Transportation
- Media Broadcast Capacity
- Medical Services

COMMUNITY SUPPORT
- Sports Clubs
- Commitment
- Critical Mass
- Business

PUBLIC SECTOR SUPPORT
- Government Support
- Working Capital

MANAGEMENT & EVENT EXPERTISE
- Leadership
- Experience

What are Lethbridge's current and potential strengths in relation to market demands?

DESTINATION STRENGTH

CURRENT STRENGTH

- High
- Moderate
- Emerging

POTENTIAL STRENGTH

MARKET DEMAND

- High
- Moderate
- Low

CSTA BID EVALUATION CRITERIA

INFRASTRUCTURE ASSETS
- Sports Facilities / Venues
- Accommodation
- Food & Beverage Services
- Transportation
- Media Broadcast Capacity
- Medical Services

COMMUNITY SUPPORT
- Sports Clubs
- Commitment
- Critical Mass
- Business

PUBLIC SECTOR SUPPORT
- Government Support
- Working Capital

MANAGEMENT & EVENT EXPERTISE
- Leadership
- Experience

What are the market demands? What are Lethbridge's current and potential strengths in relation to market demands?
Do Lethbridge's strengths match market demands?

Ideal Situation

High Demand

Medical Services
Sports Clubs
Food & Beverage Services
Experienced Leadership
Commitment—Community Support
Community Experience with Hosting

Sports Facilities / Venues
Transportation
Accommodations
Media Broadcast Capacity
Critical Mass – Volunteers
Business Community Support
Government Support
Working Capital

Area for Improvement

High Strength

Low Demand

Emerging Strength

High Strength
7.7.2 Business Travel

The business travel market assessment has been organized differently. Here, the market expectations of business event planners is presented with an indication of what criteria are more important than others. Professional opinion was used to assess the current strength of the strength of our city to meet those expectations of business travellers as well as the potential strength of each expectation.
BUSINESS TRAVEL

What are the market demands?

MARKET DEMAND

High

Moderate

Low

What are Lethbridge's current and potential strengths in relation to market demands?

DESTINATION EVALUATION CRITERIA

Consistent Branding

Family (& Friend) Member activities

Event center quality

Blend of leisure opportunities

Accessibility

Affordability

Amenities (e.g., Wi-Fi, technology etc.)

Local Attractions

Social Spaces

Walkability and proximity of meeting spaces to accommodations/activities

Diversity of accommodation supply and price points

DESTINATION EVALUATION CRITERIA

Consistent Branding

Family (& Friend) Member activities

Event center quality

Blend of leisure opportunities

Accessibility

Affordability

Amenities (e.g., Wi-Fi, technology etc.)

Local Attractions

Social Spaces

Walkability and proximity of meeting spaces to accommodations/activities

Diversity of accommodation supply and price points

MARKET DEMAND

High

Moderate

Low

CURRENT STRENGTH

High

Moderate

Emerging

POTENTIAL STRENGTH

High

Moderate

Emerging

What are the market demands? What are Lethbridge's current and potential strengths in relation to market demands?
Do Lethbridge's strengths match market demands?

Ideal Situation

High Demand

High Strength

Low Demand

Emerging Strength

Area for Improvement

High Strength

Affordability

Event centre quality

Local Attractions

Walkability/proximity of meeting spaces to accommodations/activities

Social Spaces

Family (& Friend) Member Activities

Low Demand

Amenities (e.g., Wi-Fi, technology)

Accessibility

Diversity of accommodation supply/price points

Consistent Branding

Blend of leisure opportunities

Do Lethbridge's strengths match market demands?
Nikka Yuko Japanese Garden
7.7.3 Leisure Travel

Detailed insights from Destination Canada’s Explorer Quotient traveller types were used to derive the market demand insights presented below. Professional opinion and destination analysis was used to assess the current and potential strength of the city to meet the demands of the EQ target markets.

The product market match in this Section 7.7 demonstrates where the city has the best opportunities to grow its sport tourism, business events and leisure travel sectors. Strategies are identified to grow those visitor experiences that are of high to moderate demand but are currently at moderate to emerging strength.
LEISURE TRAVEL

What are the market demands?

MARKET DEMAND

High

Moderate

Low

EXPERIENCE ACTIVITIES

NATURE, & ECO-TOURISM

- Beautiful Scenery / Sightseeing
- Visiting Well-Known Natural Wonders
- Visiting National, Provincial Parks—Interpretive Centers
- Visiting National, Provincial Parks—Adventure Experiences
- Water Based Outdoor Activities
- Outdoor / Nature Sports & Activities
- Winter Outdoor Activities
- Wildlife Viewing

CULTURAL, HERITAGE & ARTS

- Exhibits / Architecture / Historic Sites / Buildings / Museums
- Entertainment, Performing Arts & Amusement Parks
- Connecting with Locals
- Dining at Restaurants Offering Local Ingredients

FESTIVALS & EVENTS

- Attending Concerts
- Attending Outdoor Festivals
- Attending Popular Events
- Shopping, Dinning & Other Food Related Activities

SPORT TOURISM

- Attending Sport Games
- Attending Sport Tournaments
- Attending International Competitions

MARKET DEMAND BY EXPLORER TYPES

Free Spirits

Cultural Explorers
What are Lethbridge's current and potential strengths in relation to market demands?

**DESTINATION STRENGTH**

<table>
<thead>
<tr>
<th></th>
<th>HIGH</th>
<th>MODERATE</th>
<th>EMERGING</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**EXPERIENCE ACTIVITIES**

**NATURE, & ECO-TOURISM**
- Beautiful Scenery / Sightseeing
- Visiting Well-Known Natural Wonders
- Visiting National, Provincial Parks—Interpretive Centers
- Visiting National, Provincial Parks—Adventure Experiences
- Water Based Outdoor Activities
- Outdoor / Nature Sports & Activities
- Winter Outdoor Activities
- Wildlife Viewing

**CULTURAL, HERITAGE & ARTS**
- Exhibits / Architecture / Historic Sites / Buildings / Museums
- Entertainment, Performing Arts & Amusement Parks
- Connecting with Locals
- Dining at Restaurants Offering Local Ingredients

**FESTIVALS & EVENTS**
- Attending Concerts
- Attending Outdoor Festivals
- Attending Popular Events
- Shopping, Dining & Other Food Related Activities

**SPORT TOURISM**
- Attending Sport Games
- Attending Sport Tournaments
- Attending International Competitions
LEISURE TRAVEL

What are the market demands?

MARKET DEMAND

High
Moderate
Low

EXPERIENCE ACTIVITIES

ACCOMMODATIONS
Bed & Breakfasts
Hostels
Country Inns
Eco-lodges / Cabins / Huts / Yurts
Camping—Full Service
Camping - Rustic
Farm Stays / Guest Ranches
Branded Hotels / Motels

TRANSPORTATION
Self-Touring
Small Group Shuttles
Multi-day Tours by Bus
Luxury Transportation

EXPERIENCE ACTIVITIES

ITINERARIES
Detailed & Structured Itineraries
Unstructured
Spontaneity

TOP SOURCES OF TRIP PLANNING INFORMATION
Internet / Website
Friends, Family & Business Colleagues
Media relations & Unpaid Media
Traditional Travel Advertising
Travel guides, Magazines & Books

MARKET DEMAND BY EXPLORER TYPES
Free Spirits
Cultural Explorers

Cultural Explorers
Free Spirits
What are Lethbridge's current and potential strengths in relation to market demands?

**DESTINATION STRENGTH**

- High
- Moderate
- Emerging

**EXPERIENCE ACTIVITIES**

- Accommodations
  - Bed & Breakfasts
  - Hostels
  - Country Inns
  - Eco-lodges / Cabins / Huts / Yurts
  - Camping—Full Service
  - Camping - Rustic
  - Farm Stays / Guest Ranches
  - Branded Hotels / Motels

- Transportation
  - Self-Touring
  - Small Group Shuttles
  - Multi-day Tours by Bus
  - Luxury Transportation

**ITINERARIES**

- Detailed & Structured Itineraries
- Unstructured
- Spontaneity

**TOP SOURCES OF TRIP PLANNING INFORMATION**

- Internet / Website
- Friends, Family & Business
- Colleagues
- Media relations & Unpaid Media
- Traditional Travel Advertising
- Travel guides, Magazines & Books
LEISURE TRAVEL– CULTURAL EXPLORERS

Do Lethbridge's strengths match market demands?

Ideal Situation

High Demand

Unstructured Itinerary
Spontaneous Itinerary
Natural Wonders
Park Adventure Experiences
Attending Sport Matches
Attending Sport Tournaments

Area for Improvement

High Demand

Water Based Activities
Wildlife Viewing
Attending Popular Events
Exhibits / Architecture / Historic Sites / Buildings / Museums
Self-Touring
Internet / Website/Social Media

High Strength

Emerging Strength

Low Demand

Multi-day Tour Bus
LEISURE TRAVEL— FREE SPIRITS

Do Lethbridge's strengths match market demands?

Ideal Situation

High Demand

High Strength

Natural Wonders
Park Adventure Experiences
Dining at Restaurants Offering Local Ingredients
Shopping, Dinning & Other Food Related Activities

Low Demand

Emerging Strength

Area for Improvement

Branded Hotels / Motels
Wildlife Viewing
Luxury Transportation
Water Based Activities
Entertainment, Performing Arts & Amusement Parks
Attending Popular Events
Travel guides, Magazines & Books
Internet / Website/Social Media

Detailed and Structured Itinerary

Lethbridge Destination Management Plan
THE WAY FORWARD AT A GLANCE

Vision

By 2026 Lethbridge will be...
Southern Alberta’s premier destination for sport tourism and business event hosting. Visitors from across Canada and the world who come to Lethbridge, whether it be for sport, business or leisure travel, will experience the city’s authentic nature, arts, culture, heritage and Indigenous stories.

Outcomes

To achieve the city’s new tourism vision, the city will:

Experiences
- Be recognized as one of Alberta’s premier sport and business event hosting destination
- Grow its role as a regional gateway and hub for the Canadian Badlands, Crowsnest Pass and Castle destinations.
- Increase leisure travel experiences featuring the city’s history, arts, culture, nature, adventure and eco-tourism opportunities.

Economic Growth & Diversification
- Increase year-round visitation by target markets.
- Increase the length of time visitors stay in the city.
- Increase the visitor spending and total economic impact to the city from tourism.
- Increase private and public sector investment in tourism projects.
- Increase community and stakeholder support for tourism in the city.

Unified Destination Governance & Management
- Establish a unified and effective destination leadership model.
- Maximize the positive benefits tourism brings to the city while minimizing the negative social, cultural and environmental impacts.
Strategies & Priority Initiatives

Destination Development

CULTIVATE & DIVERSIFY THE CITY’S BUSINESS EVENT SECTOR
• Attract and host business events targeting the city’s most competitive industries and knowledge capital.
• Extend business travellers stay beyond the business event.

GROW THE CITY’S SPORT TOURISM PORTFOLIO
• Increase the number and diversity of sporting events delivered annually.
• Attract, organize and deliver a major competitive multi-sport event every 5 years.

ENHANCE THE DIVERSITY & QUALITY OF EXPERIENTIAL LEISURE TRAVEL OPPORTUNITIES
• Strengthen the city’s nature based, adventure and eco-tourism opportunities.
• Enhance the city’s role as a regional gateway to the Canadian Badlands and Crowsnest Pass and Castle destinations.
• Enhance the city’s arts, culture and history experiences.
• Enhance and create Indigenous tourism experiences.

PROVIDE THE RIGHT MIX OF PLACES TO STAY
• Diversify and enhance the supply of accommodations for sport, business and leisure travellers.

Destination Management

PROVIDE EASIER ACCESS
• Make it easier for visitors to access and travel within the city.

STRENGTHEN TOURISM INDUSTRY CAPACITY
• Prepare the industry to deliver exemplary visitor experiences.
• Develop the tools to enable the tourism industry and partners to grow tourism.
• Enable informed and timely destination decision-making and reporting.

MAINTAIN THE COMPETITIVENESS & ENHANCE THE SUSTAINABILITY OF THE CITY’S TOURISM INDUSTRY
• Integrate the needs of tourism in regional and local land use planning and decision making.
• Plan for and pro-actively manage undesirable impacts associated with growing tourism.
• Encourage sustainability practices in the planning, design, construction and operations of tourism businesses.

Destination Leadership

CREATE DESTINATION LETHBRIDGE—A SINGLE, UNIFIED, DESTINATION MANAGEMENT ORGANIZATION
• Identify the optimal governance structure under which to develop Destination Lethbridge.

Destination Marketing

BUILD COMMUNITY & STAKEHOLDER SUPPORT FOR TOURISM GROWTH—INTERNAL MARKETING
• Strengthen buy in and sustain endorsement and commitment to implementing the DMP.

BUILD MARKET AWARENESS & INSPIRE EVENT ORGANIZERS & VISITORS TO EXPERIENCE LETHBRIDGE
• Develop a tourism brand and storytelling framework inspired by the city’s unique selling proposition and promote it to stakeholders and target markets.
7.8 Strategies, Priority Initiatives & Actions

To move Lethbridge forward on the destination development cycle over the next 10 years, the city’s tourism industry and its partners will remain diligently focused on implementing 10 clear strategies.

**DESTINATION LEADERSHIP**

- Create a Single, Unified, Destination Management Organization

**DESTINATION DEVELOPMENT**

- Cultivate & Diversify the City’s Business Event Sector
- Grow the City’s Sport Tourism Portfolio
- Enhance the Diversity and Quality of Experiential Leisure Travel Opportunities
- Provide the Right Mix of Places to Stay

**DESTINATION MANAGEMENT**

- Easier Access
- Strengthen the Capacity of the Tourism Industry
- Maintain the Competitiveness and Enhance the Sustainability of the City’s Tourism Industry

**DESTINATION MARKETING**

- Build Community and Stakeholder Support for Tourism Growth - Internal Marketing
- Build Market Awareness and Inspire Event Organizers and Visitors to Experience Lethbridge

Each strategy contains a number of initiatives and prioritized action plans that will guide the community towards greater tourism success. Each action has been assigned a target for implementation as follows:

- **ST Short Term** = 1–2 yrs
- **MT Mid Term** = 2–5 yrs
- **LT Long Term** = 5–10+ yrs

### 7.8.1 Destination Leadership

**STRATEGY:** Create Destination Lethbridge – A Single, Unified, Destination Management Organization

**PRIORITY INITIATIVE:** Select the optimal governance structure under which to develop Destination Lethbridge.

**LEAD:**
- City
- Economic Development Lethbridge
- Lethbridge Sport Council
- Chinook Country Tourism Association
- Lethbridge Lodging Association

**POTENTIAL PARTNERS:**
- Alberta Culture & Tourism
- Travel Alberta
### Destination Development

**STRATEGY: Cultivate & Diversify the City’s Business Event Sector**

**PRIORITY INITIATIVE:** Attract and host business events targeting the city’s most competitive industries and knowledge capital such as agriculture, heritage, post-secondary institutions.

**ST** Attract and host more business events including meetings, conventions and exhibitions focused on the city’s and region’s main industries and academic institutions fields of research excellence.

**ST** Continue to pursue the development of the Lethbridge conference and trade centre.

**ST** Delegate a tourism/economic development sub-committee to focus specifically on attracting, organizing and growing the number of business events hosted in the city and supporting business travel.

**ST** Improve the business event planner kit and enhance online resources to make organizing business events in the city easier.

**ST** Enhance coordination between event planners and tour operators to drive business leads to the city’s businesses (e.g., hotels, restaurants, city facilities and entertainment facilities).

**MT** Work to coordinate and co-locate similar themed business events taking place around the same time. The goal of “co-locating” events is to add value by providing ancillary networking and educational options for visiting attendees.

**MT** Create a hometown hero ambassador program to support local businesses in attracting their own professional business travel and events.

**MT** Review and improve access between venues via multiple modes of transportation (walkability, bicycle, taxi, shuttles, shared resources, information/apps). Assess bus shuttle service to transport business conference/event delegates from one meeting space to another – enabling the city to seamlessly attract and deliver larger events without a centralized conference centre.

**LEAD:**
- Destination Lethbridge

**POTENTIAL PARTNERS:**
- University of Lethbridge
- Lethbridge College
- Business Associations
- Tourism Operators
- Accommodations Sector
- Transportation Sector
- Travel Alberta
- Alberta Culture & Tourism
PRIORITY INITIATIVE: Extend business travellers stay beyond the business event.

**Action**

- Develop and promote bleisure package itineraries to extend the length of stay and increase spending by business travellers (pre, during, and post-event). Bleisure packages should feature the city’s arts, culture, heritage, sightseeing, dining, nature and night life.

**LEAD:**
- Destination Lethbridge

**POTENTIAL PARTNERS:**
- Tourism Operators
- Accommodations Sector
- Transportation Sector
- Industry Associations
- Travel Alberta

STRATEGY: Grow the City’s Sport Tourism Portfolio

PRIORITY INITIATIVE: Increase the number and diversity of sporting events delivered annually.

**Actions**

- **ST** Attract and host more single sport competitive events annually.
- **ST** Attract and host more non-competitive events such as sports conferences, meetings and coaching and training clinics to the city.
- **ST** Support the efforts of local sport organizations to grow the number of created and invitational sporting events.
- **MT** Support efforts to grow spectator attendance at sport events and, in particular, professional and post-secondary sporting events (Lethbridge Bulls, Lethbridge Hurricanes, Pronghorn and Kodiak events).
- **ST** Continue the Sport Tourism Committee, or a similar model, to facilitate a coordinated sport tourism model to attract, create and retain sport tourism opportunities for Lethbridge.
- **MT** Coordinate with and integrate the leisure travel opportunities into sports events to extend the length of stay by spectators.

**LEAD:**
- Destination Lethbridge

**POTENTIAL PARTNERS:**
- Sport Community
- Canadian Sport Tourism Alliance
- University of Lethbridge
- Lethbridge College
- Tourism Operators
- Accommodations Sector
- Transportation Sector
- Travel Alberta
- Alberta Culture & Tourism
Targeted Sport Tourism Events:

**Attract:**
- Multi-sport games
- Championships
- Professional / post-secondary sport events
- Tournaments
- Cause & created events
- Non-competitive sport events
- Spectator sporting events

**At the following levels of play:**
- National
- Provincial
- Intra-Provincial/Regional
- Local

**For the following sports:**
- Basketball
- Hockey
- Softball
- Baseball
- Soccer
- Lacrosse
- Rugby
- Golf
- BMX
- Moto-cross
- Archery

**PRIORITY INITIATIVE:** Attract, organize and deliver a major competitive multi-sport event every 5 years.

**Actions**

- Maintain list of prospective multi-sport/mega major events that are aligned with the city’s existing and / or future sport facilities.
- Pro-actively develop bid committees to lead the research, planning, preparation and submission of bids to host targeted events.
**Sport Development and Sport Tourism**

As a nation, sport leaders are working to celebrate and promote participation in sport whether that participation is for recreation, competition, high-performance or community development. The Lethbridge Sport Council also embraces this vision.

Though there are numerous definitions, in general, Sport Development involves the implementation of processes, systems and structures to provide sport opportunities and positive sporting experiences for individuals and communities. Sport Development in Canada is guided by the Canadian Sport Policy (CSP) Framework (See Figure 27). The CSP framework is an athlete-centred seven stage evolution of participation in sport that corresponds to an athlete’s physical and mental development. It is a training, competition and recovery program based on developmental age—the maturation level of an individual—rather than chronological age.

Though the first priority for the LSC is sport development, the organization has also been working diligently to grow sport tourism in Lethbridge. Sport tourism is the intersection between sport and tourism and is considered to be any activity in which people are attracted to a particular location, outside of their home town, as a sport event participant, an event spectator, or to attend sport attractions or business meetings. Sport tourism brings together numerous groups in a community each of which may be interested in hosting a sport tourism event but for different reasons.

**Figure 27. Canadian Sport Policy 2012 Policy Framework**
It is essential that as tourism in the city, and in particular sport tourism evolves, that the City’s and sport organization’s attention to sport development and advancing citizens along the CSP is not forgotten. The first priority for sport organizations should be to remain focused on sport development. Sport tourism is a significant, yet secondary, priority which will help support the aims of sport development. Sport tourism should be considered a means to a desired end rather than the end itself.

**Canadian Sport Policy Goals**

**INTRODUCTION TO SPORT**
Canadians have the fundamental skills, knowledge and attitudes to participate in organized and unorganized sport.

**RECREATIONAL SPORT**
Canadians have the opportunity to participate in sport for fun, health, social interaction and relaxation.

**COMPETITIVE SPORT**
Canadians have the opportunity to systematically improve and measure their performance against others in competition in a safe and ethical manner.

**HIGH PERFORMANCE SPORT** Canadians are systematically achieving world-class results at the highest levels of international competition through fair and ethical means.

**SPORT FOR DEVELOPMENT**
Sport is used as a tool for social and economic development, and the promotion of positive values at home and abroad.
Sport events have traditionally been organized by sport organizations for sport purposes. The most successful sport tourism destinations bring together the sport, tourism, business communities and the municipal government to deliberately plan and organize a unified sport tourism sector.

Figure 28. Critical Players in the Sport Tourism Sector
STRATEGY: Enhance the Diversity and Quality of Experiential Leisure Travel Opportunities

PRIORITY INITIATIVE: Strengthen the city’s nature based, adventure and eco-tourism opportunities with a focus on the city’s parks and river valley.

- MT Following the River Valley Parks Master Plan recommendations, develop tourism themes for the city’s river valley; evaluate the market readiness of attractions and amenities; identify development priorities and sites to share the history and natural heritage attractions with visitors.
- ST Develop river valley based travel itineraries featuring natural attractions, Indigenous culture and culture.
- MT Explore opportunities to develop mountain biking based tourism experiences within the river valley.
- MT Provide a deliberate system of access and egress points for river valley visitors; ensuring access points align with natural trip durations and patterns.
- MT Provide visitor amenities such as washrooms, campgrounds, playgrounds, eating areas, cyclist/pedestrian trails, signage and wayfinding, parking and accommodations at river access points and staging areas.

LEAD:
• Destination Lethbridge
• City

POTENTIAL PARTNERS:
• Sport Community
• Canadian Sport Tourism Alliance
• University of Lethbridge
• Lethbridge College
• Tourism Operators
• Accommodations Sector
• Transportation Sector
• Travel Alberta
• Alberta Culture & Tourism

PRIORITY INITIATIVE: Enhance the city’s role as a regional gateway to the Canadian Badlands and Crowsnest Pass and Castle destinations.

- ST Continue to support and collaborate with tourism leaders in the Crowsnest Pass and Castle destinations as the regions plan for future tourism developments. Continue to position the city as a regional gateway and accommodations hub for visitors to the Crowsnest Pass and Castle.
- ST Continue to collaboratively develop packaged itineraries between the city’s accommodations sector and tourism operators and major attractions in the Canadian Badlands and Crowsnest Pass and Castle destinations to improve cooperation

LEAD:
• Destination Lethbridge

POTENTIAL PARTNERS:
• Alberta Environment & Parks
• Alberta Culture & Tourism
• Local Municipalities
• Tourism Operators
• Accommodations
PRIORITY INITIATIVE: Enhance the city’s arts, culture and history experiences.

Actions

- In alignment with the Public Art Master Plan, support the development of exciting, unique and appealing public art displays that celebrate and present the people, culture, industries and nature of the city.

- Develop public art tours / itineraries that feature and highlight the city’s unique public art displays and galleries.

LEAD: Destination Lethbridge

POTENTIAL PARTNERS:
- Arts Council
- City

PRIORITY INITIATIVE: Enhance and create Indigenous tourism experiences.

Actions

- Identify and work with interested Indigenous stakeholders and attractions (including market-ready museums, performing artists, and cultural heritage operators) to develop partnerships, package offerings, improve their market readiness and appeal to target markets.

- Work with local First Nations to explore interest and feasibility of developing Indigenous tourism experiences such as guided walking/hiking tours, cultural/heritage sites interpretive programming.

LEAD: Destination Lethbridge

POTENTIAL PARTNERS:
- Alberta Aboriginal Relations
- Indigenous Communities
- Travel Alberta
- Alberta Culture & Arts
- Industry Associations
- Tourism Operators
- Accommodations Sector
- Post-Secondary Institutions
- Galt Museum and Archives
- Fort Whoop-Up

STRATEGY: Provide the Right Mix of Places to Stay

PRIORITY INITIATIVE: Diversify and enhance the supply of accommodations for sport, business and leisure travellers.

Actions

- Encourage the accommodation sector to collaborate on the development and / or adoption and application of physical property and quality service standards.

- Determine the feasibility and, if feasible, promote the development of a higher end hotel in the city to cater to business tourism expectations.

- Identify potential sites and partners to develop RV campground(s) in the city and region.

- Monitor trends in accommodations and camping to enable accommodations provided to align with evolving business, sport and leisure traveller expectations.

LEAD: Destination Lethbridge

POTENTIAL PARTNERS:
- Accommodations Sector
- Alberta Culture & Tourism
- Tourism Operators
7.8.3 Destination Management

STRATEGY: Easier access

PRIORITY INITIATIVE: Make it easier for visitors to access the city and travel within it.

**Actions**

- **ST** Undertake a visitor friendliness assessment. The assessment should consider and provide recommendations regarding:
  - Ambiance, visual appeal and identity of the community
  - Quality of service and professionalism
  - Pedestrian friendliness
  - Wayfinding and signage
  - Quality and location of visitor services and amenities
  - Visitor information.
- **ST** Develop a wayfinding & signage system that reflects the city’s tourism brand. Use the wayfinding system to improve visitors’ ability to travel easily and independently within the community and to access key points of interest, attractions, operators and information services.
- **ST** Continue to support efforts by the Lethbridge Airport to enhance air access to the city from target market origins.

**LEAD:** • Destination Lethbridge

**POTENTIAL PARTNERS:** • City • Transportation Sector

---

STRATEGY: Strengthen the Capacity of the Tourism Industry.

PRIORITY INITIATIVE: Prepare the industry to deliver exemplary visitor experiences.

**Actions**

- **MT** Continue to collaboratively identify training needs and work with industry partners and training providers to deliver appropriate front-line staff training (i.e., pilot the WorldHost Customer Service Training Program), business training.

**LEAD:** • Destination Lethbridge

**POTENTIAL PARTNERS:** • City • Alberta Culture & Tourism • Travel Alberta • Sport Community • Artisans • Tourism Operators • Accommodations Sector • Transportation Sector
The delivery of quality customer service in the tourism sector is critical to satisfying increasing consumer expectations and achieving business success.

Ensuring front-line staff and tourism operators have the ability to effectively run businesses and host visitors is essential to destination success. The city’s destination leaders have a vested interest in, and responsibility to, help the tourism industry develop the skills and confidence to work with visitors and operate effective and sustainable businesses. Development of enhanced training opportunities for customer service, business and entrepreneurship skills should be implemented in partnership with regional training partners, including school districts, post-secondary institutions, and public and private sector training agencies.
PRIORITY INITIATIVE: Develop the tools to enable the tourism industry and partners to grow tourism.

- Continue to develop tools to support sport and business organizations in their efforts to prepare bids for targeted sport and business events.
- Adopt the Lethbridge Sport Council’s bidding process and ensure sport tourism stakeholders are aware of the Sport Tourism Bid Development processes for single and mega / multi-sport events.
- Develop and maintain an inventory of interested sport tourism, business event and other tourism related volunteers.

INITIATIVE LEAD: • Destination Lethbridge
POTENTIAL PARTNERS: • Sport Community
• City

PRIORITY INITIATIVE: Enable informed and timely destination decision-making and reporting based on sound destination intelligence.

- Work with Alberta Culture and Tourism and Travel Alberta to develop and implement a destination research strategy to enable science based decision making and to generate better insights on market intelligence, economic impact, destination performance and visitor satisfaction specific to Lethbridge. Establishment of consistent data collection, analysis and reporting procedures should be a focus of the strategy.

INITIATIVE LEAD: • Destination Lethbridge
POTENTIAL PARTNERS: • Alberta Culture & Tourism
• City

Accurate destination intelligence, based on timely, consistent and reliable research and data that is specific to the city is fundamental to ensuring sound decision making, targeted marketing efforts, market-driven visitor experience development and performance monitoring and reporting. Though numerous organizations in the city’s tourism industry produce and publish destination data, these datasets often aren’t collected, analyzed or reported in a consistent manner.
The success and competitiveness of tourism is dependent, in part, on maintaining the quality and integrity of the destination’s tourism resources – features, settings and scenery. Other industry and land use can have both detrimental and positive effects on the success of tourism. Careful land use planning and decision making is required to ensure the competitiveness of the tourism industry is enhanced, in key precincts within the city, not compromised.

STRATEGY: Maintain the Competitiveness and Enhance the Sustainability of the City’s Tourism Industry

PRIORITY INITIATIVE: Integrate the needs of tourism in regional and local land use planning and decision making.

Actions

- Maintain an up to date inventory of the city’s sport, business and leisure tourism features and their characteristics.
- Work with the City, School Districts and other facility operators to ensure long range recreation facility master planning incorporates facility development and redevelopments priorities necessary to attract targeted sport tourism events.
- Work with the Alberta Government to ensure tourism, and the aims of this plan, are meaningfully considered and reflected in the South Saskatchewan Regional Plan.
- Work with municipal planners to ensure the needs of tourism are incorporated into the Municipal Development Plan and other local planning efforts. Consideration should be given to the benefit of designating Tourism Precincts to ensure themed tourism districts are created and offer visitors a memorable experience.

INITIATIVE LEAD:
- Destination Lethbridge
- City

POTENTIAL PARTNERS:
- Alberta Culture & Tourism
- Alberta Environment & Culture
- School Districts
- Sport Community
PRIORITY INITIATIVE: Plan for and pro-actively manage undesirable impacts associated with growing tourism.

**ST** Utilize the Lethbridge Sport Council’s Framework for Assessing Sport Event Hosting Opportunities to evaluate the appropriateness of each event hosting opportunity.

**ST** Provide timely and accurate information to city residents about potential impacts in advance of sport and business events (e.g. traffic congestion, road closures, displacement of local recreational users from local facilities).

**MT** Implement, or where necessary, develop visitor codes of conduct and education programs that promote responsible and respectful travel.

**INITIATIVE LEAD:**
- Destination Lethbridge

**POTENTIAL PARTNERS:**
- City
- Tourism Operators
- Sport Community
- Business Community

Tourism can be a positive force in host communities but it can also be a source of various negative impacts if it’s not effectively managed. As the popularity of the city grows with tourists, so too does the potential for undesirable environmental, social and cultural impacts which can negatively affect visitor experience and the destination brand. Some impacts are the result of uninformed and inexperienced users while others result from careless behaviors or illegal activities. For example, some interviewees identified that as larger events come to Lethbridge, there is the possibility for increasing problems associated with traffic congestion, air quality issues, displacement of local recreational groups and competition between tourism sectors for limited accommodation spaces etc. As more people come and visit the city’s river valley, parks and natural areas, there is the potential for greater environmental impacts. To avoid or manage these, and other, potential impacts, proactive and deliberate management strategies will be needed.
Environmental Impacts:
- Vegetation and habitat damage or loss
- Wildlife harassment & encounters
- Erosion and soil compaction
- Air quality reduction
- Water pollution
- Greenhouse gas emissions

Social and Cultural Impacts:
- Change or loss of local identity
- Culture clashes
- Commodification of local cultures
- Crime increase
- Crowding and congestion (e.g., road closures)

Social and Cultural Impacts:
- Change or loss of local identity
- Culture clashes
- Commodification of local cultures
- Crime increase
- Crowding and congestion (e.g., road closures)

PRIORITY INITIATIVE  Encourage sustainability practices in the planning, design, construction and operations of tourism businesses.

**ST** As a destination, adopt, implement and promote the GSTC’s Criteria for Destinations. Encourage accommodation providers and tour operators within to adopt and apply the GSTC’s Criteria for Hotels and Tour Operators.

**MT** Develop educational materials and tools to support implementation of the GSTC criteria. Further, work with educational organizations and institutions, University of Lethbridge and Lethbridge College, to adopt and integrate the GSTC criteria and approaches for improving sustainability into the tourism education and training curriculum.

**MT** Promote, to target markets, the destination’s efforts to improve its sustainability by adopting and implementing the GSTC criteria. Feature the destination’s sustainability leaders in case studies and marketing collateral.

**MT** Develop an information management system to track the hotels and tour operators that have adopted and are implementing the GSTC Criteria for Hotels and Tour Operators and those that have received external sustainability accreditation or certification.

**MT** Prepare, publicly disseminate and promote a regular State of the Destination Monitoring Synopsis to report on the destination performance measures and progress toward achieving the outcomes set in this plan.

**INITIATIVE LEAD:**  Destination Lethbridge

**POTENTIAL PARTNERS:**  
- City
- Tourism Operators
- Accommodations Sector
- Transportation Sector

Sustainable tourism is no longer considered a niche sub-sector. Visitors are much more environmentally and socially conscious and are giving more attention to how a destination avoids and manages undesirable environmental, social and cultural effects while expecting that their expenditures benefit the local economies. A focus on sustainability extends the destination lifecycle, saves operators money, protects the tourism resources on which the destination’s competitiveness depends and allows the region to differentiate itself from its competition.
Global Sustainable Tourism Council Criteria

The Global Sustainable Tourism Council (GSTC) has led the development of a global set of sustainable tourism criteria and indicators for hotels and tour operators as well as Destinations. The criteria act as the global baseline standards for sustainability in travel and tourism. The criteria are organized into four pillars:

1) Sustainable management
2) Socioeconomic impacts
3) Cultural impacts
4) Environmental impacts (e.g., consumption of resources, pollution reduction, and conservation of biodiversity and landscapes.)
7.8.4 Destination Marketing

**STRATEGY: Build Community and Stakeholder Support for Tourism Growth - Internal Marketing**

**PRIORITIZED INITIATIVE: Strengthen buy in and sustain endorsement and commitment to implementing the DMP.**

- **Prepare a list of critical stakeholders that need to become champions of the plan and identify needs and communications tools to inspire new champions (see Table 7 for an initial list of stakeholders).**

- **Identify and pursue opportunities to present the DMP at face-to-face meetings, group presentations, town hall meetings, local media/information events to share the vision and ensure ongoing, consistent communications. Connect with potential endorsers early to begin creating ambassadors.**

- **Identify and attend relevant industry functions held by Travel Alberta, Canadian Sport Tourism Alliance, Aboriginal Tourism Canada and Regional DMOs—seek out opportunities to provide updates and profile the plan.**

**INITIATIVE LEAD:**
- Destination Lethbridge

**POTENTIAL PARTNERS:**
- Travel Alberta
- Alberta Culture & Tourism

In alignment with the vision for Lethbridge in 2025, it is important that all stakeholders and the ‘champions of tourism’ become ambassadors for the city’s tourism initiatives, for ongoing collaboration and for implementing the DMP. To be inspired, stakeholders need to become well informed of the intentions behind creating a vibrant and diverse city destination. While communicating Lethbridge’ DMP vision to stakeholders, it will be very important to continue to listen to their feedback and continue to engage them in the process. Creating a stakeholder communications strategy will allow destination leadership to identify champions early, gaps in information which may reduce future buy-in and realize those who will never come on board.

The 20/60/20 rule of communications holds true for this initiative—20% of stakeholders will not believe Lethbridge as a city will reach its tourism goals, and 20 per cent are already believers. Therefore it is important to focus on the 60 per cent who are unaware of the intention, are uninformed of the opportunities and once educated and inspired, can join the 20 percent who are already supporters, building positive consensus.

Through collaboration, this strategy will also help to better integrate marketing and PR efforts, and further reduce ‘silo’ approaches that are currently happening within the city and in the region.
Table 7. Critical Stakeholders & Mutual Needs

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>What Lethbridge DMO needs from them</th>
<th>What they need from Lethbridge DMO</th>
<th>Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination Canada including Business Events Canada</td>
<td>Latest research and promotion of Alberta and its cities as significant meetings destinations with multiple venues for various sized groups.</td>
<td>Information, updates on current capacity and future capacity, via Travel Alberta.</td>
<td>Keep Travel Alberta informed but monitor Destination Canada’s BEC site for up to date research and target markets.</td>
</tr>
<tr>
<td>Travel Alberta</td>
<td>Endorsement, feedback, guidance, continued promotion in the Travel Alberta MICE Guide with up to date information, inclusion in Meeting Planners news</td>
<td>Confirmation of the vision (short and long term), engagement, communications tools, stories, images, spokespeople, confirmation and timelines of expansions and upgrades to existing product predicted over the next 2–5 years, as well as new experiences</td>
<td>Face-face meetings, presentations, updates, press releases, e-news, social media, inclusion on fam trips, Lethbridge DMO representatives attending industry workshops and conferences.</td>
</tr>
<tr>
<td>Alberta Culture and Tourism</td>
<td>Support, feedback, guidance, engagement</td>
<td>Information on vision and governance structure, updates, awareness of impact to tourism industry overall.</td>
<td>Face-face meetings, presentations, e-news, copies of press releases</td>
</tr>
<tr>
<td>Travel Influencers within the city—Economic Development Lethbridge, Lethbridge Sport Council, Lethbridge Lodging Association, Chinook Country Tourist Association</td>
<td>Endorsement, feedback, engagement, participation, ideas</td>
<td>Information on short and long term goals, engagement, communication materials</td>
<td>Personal meetings, advisory panels, social media, round table discussions, town halls, press releases, e-news and reports.</td>
</tr>
<tr>
<td>Regional travel influencers including regional DMOs, (Chinook Country Tourist Association, Canadian Badlands Ltd.) activity associations and event organizers</td>
<td>Endorsement, feedback, engagement, participation, information and updates on potential opportunities, leads.</td>
<td>Information, promotion materials, engagement and outreach.</td>
<td>Presentations, inclusion in round table discussions, reports, press releases, e-news, social media</td>
</tr>
<tr>
<td>Alberta Sport Connection</td>
<td>Endorsement, market information, leads, feedback, guidance, funding</td>
<td>Engagement, information on capacity, new venues and upgrades, promotional materials,</td>
<td>Meetings, press releases, e-news, social media,</td>
</tr>
</tbody>
</table>
### Stakeholder Needs and Tools

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>What Lethbridge DMO needs from them</th>
<th>What they need from Lethbridge DMO</th>
<th>Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada Sport Tourism Alliance</td>
<td>Endorsement, market information, feedback, guidance, leads, a member profile on their website.</td>
<td>Membership, engagement, information on capacity, new venues and upgrades, promotional materials.</td>
<td>Member profile, press releases, sport events congress and sport event exchange.</td>
</tr>
<tr>
<td>Aboriginal Tourism Canada</td>
<td>Guidance, support, engagement, funding</td>
<td>Information on in-market Indigenous experiences or how guests can access Indigenous experiences via Lethbridge.</td>
<td>Presentations, inclusion in round table discussions, reports, press releases, e-news, social media, trips, attendance at conferences*</td>
</tr>
<tr>
<td>Municipal &amp; Provincial Government Departments (Environment &amp; Parks, Transportation, Municipal Affairs)</td>
<td>Support, access, permits, funding</td>
<td>Information, engagement, stewardship</td>
<td>Presentations, inclusion in round table discussions, reports, press releases, e-news, social media, inclusion on FAM trips</td>
</tr>
</tbody>
</table>

---

Travel Alberta is defining best practices in destination marketing and integrating our strategy into other national, provincial and regional plans. We foster partnerships with our tourism partners to align Alberta’s marketing power under a consistent brand and a consistent voice. We seek out tourism connections as they relate to culture, industry, economy and public affairs for insight into how our stakeholders approach Alberta.

—TAB Strategy 2014
STRATEGY: Build Market Awareness and Inspire Event Organizers and Visitors to Experience Lethbridge.

PRIORITY INITIATIVE: Develop a Lethbridge tourism brand and storytelling framework that is inspired by the city’s unique selling proposition and promote it to stakeholders and target markets.

ST
Research target markets current perceptions and attitudes toward the city and collaboratively develop a destination brand and story-telling framework that complimentary of Alberta’s and Canada’s brands. Integrate the brand story-telling framework into all visitor experiences, marketing and front-line staff training.

ST
Develop a comprehensive destination marketing strategy to reach target business, sport and leisure markets.

ST
Undertake a coordinated social media campaign(s) to introduce target markets to the city’s brand, stories and compel greater visitation. Efforts should also focus on engaging visitors before, during and after their journey.

ST
Maintain and promote the City’s sport tourism and business event hosting resume.

MT
Identify skills and marketing support which will assist stakeholders in improving their own marketing expertise as well as support local marketing efforts such as social media workshops and story-telling workshops.

MT
Maintain, though modernize and enhance the effectiveness of, the Lethbridge Visitor Information Centre.

INITIATIVE LEAD:
- Destination Lethbridge

POTENTIAL PARTNERS:
- Travel Alberta
- Alberta Culture & Tourism
- Tourism Operators
- Accommodations Sector
- Transportation Sector
Visitor Information Centres are evolving. The VIC’s of the future will do more than provide visitors information, via maps and print media in a single physical location. VICs will need to provide:

- High level of customer service with knowledgeable staff,
- Digital Information kiosks,
- Wi-Fi,
- Interactive online mapping and information,
- Complementary services (cafés),
- Relevant real-time information,
- Mobility, such as mobile vans for special events and high-traffic locations,
- Share information and human resources between multiple physical VICs,
- Improved signage,
- Deeper content and accurate trip planning information,
- Be located in the heart of the visitor spending district

It is time for Lethbridge to tell its own tourism story. A branded “story-telling” framework, when aligned with the regional and provincial tourism brand, provides the opportunity to deepen the emotional connection between the traveller and the destination. As the inventory of tourism assets and review of the city and region’s history showed, there are many stories that are unique to this city destination and found nowhere else. There is the opportunity to define the stories all travellers to Lethbridge should be exposed to—creating a sense of place that truly differentiates Lethbridge from other cities across Alberta and across Canada. These stories will be driven by landscapes, natural heritage, culture, heritage, traditions, and people. These stories can create powerful emotions for travellers as they immersing themselves in the unique experiences Lethbridge has to offer.

By creating story-telling frameworks, overriding themes (nature, adventure, indigenous, sports, business) can be further fleshed out and guidelines provided for tourism stakeholders to follow. A framework ensures that the core theme or messaging is consistent for operators and across communities, while conversely allowing individuals and businesses to share their own stories.

The story-telling framework should be consistently integrated into product and experience development, training/education, and marketing activities in order to support the consistent delivery, whether coming to Lethbridge for sport tourism, a business event or visiting friends and family.

As well, as discovered through social media analytics, the potential of social media as a key communications and marketing tool that engages target markets at all points along the path to purchase is under realized. A vibrant social media presence is essential to a destination’s success.
Performance monitoring is essential to sound destination planning and management. Ongoing monitoring of meaningful performance metrics provides essential information which enables informed decision making and management responses. Monitoring can draw early attention to emerging issues and problems allowing proactive responses. As market interest in sustainability continues to grow, monitoring and reporting has become increasingly important in destination marketing and positioning as well. Recognizing the value and importance of regular monitoring, regular “State of the Destination” summaries will be prepared that report on the following indicators:
OUTCOME

Experiences:
• Premier sport and business event hosting destination
• Regional gateway and hub
• Increased leisure travel experiences

Increase year-round visitation by target markets.
Increased length of time visitors stay in the city.

Increased visitor spending and total economic impact to the city from tourism.

Increased private and public sector investment in tourism projects.

Increased community and stakeholder support for tourism in the city.

Established a unified and effective destination leadership model.

Maximized the positive benefits tourism brings to the city while minimizing the negative social, cultural and environmental impacts.

PERFORMANCE INDICATORS

• Number of market and export ready visitor experiences.
• Net Promoter Score - visitor satisfaction rate.
• Tourism relate social media sentiment—as posted on main social media platforms

• Total visits.
• Occupancy rates.
• Number of off-peak season visits.
• Off-peak season occupancy rates.
• Average length of stay by visitor origin.

• Revenue per Available Room (REVPAr)
• Average Daily Rate
• Average overnight spending per visitor by origin.
• Total economic impact.
• Number of full-time equivalent jobs generated.

• Value of private sector investment.
• Number of major private sector projects.
• Value of public sector investment.
• Number of major public sector projects.
• Number of market-ready public sector experiences.
• Increase in the number of tourism businesses.

• Increase in partnerships / participation and support from stakeholders, municipalities and tourism industry.

• Annual budgets of Destination Lethbridge
• Number of, and attendance at, annual public meetings to discuss destination management issues.
• Degree of public satisfaction with destination management.

• Number of tourism operations that have received tourism certification (GSTC recognized) or environmental management accreditation.
• Number of sustainably certified or verified tourism operations.
• Biodiversity condition trends.
• Area of habitat restored through tourism efforts.
9. REFERENCES


   http://www.albertasport.ca/sport/alberta-sport-plan.aspx
   http://www.albertasport.ca/media/332569/atpr-sport-plan-web2.pdf


APPENDIX A

POLICY OVERVIEWS
9.1 National

Canada’s Federal Tourism Strategy - Welcoming the World recognizes the need to increase awareness of Canada as a destination, facilitate ease of access and movement for travellers and their safety, encourage product development and investment in tourism assets, and facilitate an adequate supply of skills and labour to deliver visitor experiences. The strategy recognizes that destination competition is growing rapidly and recommends that to be successful; Canada must better position itself to capitalize on the opportunities that lie in attracting more international visitors from more source markets such as China, Brazil and India while reinforcing domestic demand.

Destination Canada is Canada’s national tourism marketing organization and leads the industry’s efforts to market Canada as a premier four-season tourism destination. Destination Canada focuses on improving visitation by high yield visitors and undertakes many marketing, communications, travel-trade, media and public relations campaigns and activities that have implications for tourism in Lethbridge. Destination Canada also provides important market research, such as the Explorer Quotient and programs that can be used by local operators to strengthen the tourism industry.6

Canada’s National Sport Hosting Policy for hosting international sport events presents a framework for the delivery of Canadian Heritage (Sport Canada)’s Hosting Program. The growth in hosting sport events provides a stimulus for sport development, is an economic generator, and community development tool. Sport Canada/Canadian Heritage works with provinces, territories and the sport community to support strategic approaches for bidding and hosting international sport events.

9.2 Provincial

9.2.1 Tourism & Economic Development

Alberta’s Tourism Framework

Alberta’s Tourism Framework is the province’s strategy for strengthening and aligning the tourism industry. The framework sets a path forward for creating and marketing authentic Alberta tourism experiences that cannot be found anywhere else. The plan has a goal of making tourism a $10.3 billion industry in the province by 2020 and recognizes the importance of all regions working to provide new and enhanced experiences in order to achieve the goal. The framework identifies, using the Destination Canada’s Explorer Quotient, “Free Spirits” and “Cultural Explorers” as the provincial target markets.

The framework includes a number of priorities ranging from innovation and development, accessibility, marketing, alignment, and research.6 The framework commits the government to improve access to public land for tourism and identifies the need to address tourism experience gaps through the provision of new and enhanced tourism experiences.
Travel Alberta Business and Marketing Strategy

Travel Alberta—the provincial Marketing Organization—has developed a business and marketing strategy to help the province achieve its goal of driving the visitor economy to more than a $10 billion industry by 2020. It specifically seeks to direct Alberta’s brand to high-potential markets by leading the province’s authentic experiences in breathtaking landscapes to drive visitation throughout the province. The following strategic objectives were identified in its 2014-2017 strategy:

- Mobilize Team Alberta
- Defend and Grow Tourism Revenue
- Leverage Brand Strength
- Drive Organizational Excellence.

Active Alberta

“Active Alberta” is a provincial strategy that recognizes the importance of active lifestyles and outdoor recreation for the physical, social and emotional health and well-being of Albertans. The strategy identifies the need to develop new recreational land and trails that link communities to the province’s parks, outdoor spaces and recreation facilities. It also encourages local governments to develop local parks and outdoor spaces by connecting them to regional parks, outdoor spaces and trails while intending to promote tourism-based recreation, active living and other sport opportunities. Outcome 5 ‘Active Coordinated System’ contains a specific priority that can strengthen and support sport tourism in Lethbridge: “Develop and promote tourism based recreation, active living and sport opportunities” (p.22).

Alberta Sport Plan

“Alberta Sport Plan” encourages a more active Alberta where you will enjoy a high quality of life, have improved health and wellness, strong communities, economic benefits and personal fulfilment through recreation, active living and sport. Tourism is identified as an integral component of the plan to support Alberta’s Tourism Framework (p. 7).

9.2.2 Land Management

Alberta’s Land-Use Framework

The Land Use Framework (LUF) sets out the province’s approach to managing land and natural resources to achieve Alberta’s long-term economic, environmental and social aspirations. The LUF sets three provincial outcomes for land:

- Healthy economy supported by land and natural resources
- Healthy ecosystems and environment
- People-friendly communities with ample recreation and cultural opportunities.

As a land use, tourism can impact and be affected by other industries and land users. It can also have impacts on a city’s ecosystems. As such, direction from the LUF has been incorporated into this plan.
9.3 Regional

9.3.1 Canadian Badlands Tourism Development Strategy

The Canadian Badlands Tourism Development Strategy, developed in 2008, was the first strategy of its kind to provide a blueprint for a range of stakeholders—from municipalities to private tourism operators—to move toward a high quality tourism destination experience for all who visit the region.\(^{11}\)

Recognizing the region’s many tourism assets—from river valley badlands to un-glaciated hills, a UNESCO world heritage site, and a rich Indigenous history—the strategy aims to build community and regional capacity for economic growth and enhancing area quality of life while preserving significant natural and cultural resources.\(^{12}\)

The strategy contains a number of priorities that are critical to the region’s success and long-term viability. One of its priorities is to “expand and enhance four area visitor hubs and four secondary destinations under the Canadian Badlands brand” (p. 11). Lethbridge has been identified as one of the primary destinations (tourism hubs) as it is positioned as a regional gateway, conference centre, sport tourism venue and potential as a retirement destination as Alberta and western Canada continue to grow.\(^{12}\) In summary, the strategy will identify strategic priorities, tourism development initiatives, and organizational alignment opportunities to improve the overall success of the destination.

9.3.2 South Saskatchewan Regional Plan

The South Saskatchewan Regional Plan (SSRP) sets the stage for “robust growth, vibrant communities and a healthy environment within the region over the next 50 years” (p.1).\(^{13}\) The SSRP identifies strategic directions for the region over the next 10 years for a number of industries that contribute to the region’s economic development. Tourism has been identified as one of these industries; the SSRP’s tourism objective is as follows: “the region is positioned as a world-class, year-round, tourism destination” (p. 50). Among the four strategies outlined under tourism, one is to “work with municipalities, private investors and landowners to identify areas of high value for recreation and tourism and to encourage tourism investment and infrastructure development opportunities on identified lands” (p. 51).\(^{13}\) The plan acknowledges the importance of maintaining the region’s tourism resources including its scenic resources and developing scenic corridors. In addition to tourism development, the plan also commits local and provincial governments to meaningfully engaging Indigenous peoples in all land use planning and decision making; including, tourism.

The South Saskatchewan Regional Plan contains four strategies outlined under tourism including to “work with municipalities, private investors and landowners to identify areas of high value for recreation and tourism and to encourage tourism investment and infrastructure development opportunities on identified lands” (p. 51).
Recognizing the importance of a healthy and competitive business environment to attract tourism and investment, the MDP contains a specific policy as follows: “Strengthen Lethbridge’s role as a regional tourism centre for south-western Alberta”.
9.4  Local

9.4.1  City of Lethbridge Integrated Community Sustainability Plan/ Municipal Development Plan

In 2010, the City of Lethbridge adopted an Integrated Community Sustainability Plan/Municipal Development Plan, its highest order and master visioning document, that will guide future development within Lethbridge over the next 40 years. The plan was created to achieve the following:

- Encourage and promote long-term sustainability into the year 2050 through the adoption of policies that safeguard the sustainable integrity of the community
- Guide future policy regarding land use, transportation, and infrastructure investment decisions within the community in a way that respects the Plan Your City Vision
- Define a clear description of the city’s preferred direction with respect to infrastructure, service provision, and future development
- Coordinate municipal bylaws, policies, programs, and investments.

While the plan is comprehensive in scope—covering a wide range of sustainability dimensions—it contains very little policy direction on tourism. However, under its Plan Your City policies, it has a specific goal to become a good place to open and operate a business. One policy to support this goal is to “strengthen Lethbridge’s role as a regional tourism centre for south-western Alberta” (p. 48). It lists a few action items that will be pursued to enhance tourism including cooperating with regional and provincial tourism development organizations and cooperating with regional and provincial tourism development organizations.

9.4.2  County of Lethbridge and City of Lethbridge Inter-municipal Development Plan

In 2004, the Intermunicipal Development Plan was adopted by the County of Lethbridge and City of Lethbridge (currently under review, anticipated completion fall 2016).

The plan provides policy direction within city boundaries and includes a process for planning and development approvals as well as a dispute resolution process. The plan enables a cooperative land use planning process between the city and county. As a traditional land use plan, it does not contain any policy direction on how the planning process can accommodate tourism development.

9.4.3  City of Lethbridge Major Community Event Hosting Policy

The City of Lethbridge recently adopted the “Major Community Event Hosting Policy” recognizing that a framework was needed for hosting major provincial, interprovincial, national and international events which attract attention and bring the city recognition. As a way to enhance the profile and visibility of the city, Lethbridge is committing to providing funding and in-kind services to support these types of events. The policy contains a number of guiding principles that the event must achieve in order to be eligible for funding and support. These principles include everything from enhancing the profile and visibility of the city, being open to the general public, engaging with corporate community and/or other funding sources, and being organized in conjunction with a local committee. This policy has direct implications for the city’s tourism future and may result in events becoming an even more important part of the city’s tourism economy.
9.4.4  City of Lethbridge Recreation and Culture Master Plan

Another planning document that provides strategic and policy support for tourism is the City’s Recreation and Culture Master Plan, which was released in January 2013. The plan was developed to provide a depiction of the present and future needs for recreation and culture facilities and services in the city and community and outline strategies as to how to meet identified needs for a ten year period. The plan contains a number of items relating to tourism, including a key initiative for recreation, sport, culture and heritage tourism, listed as follows:

“Develop tourism strategy and/or master plan to develop a common strategic direction, to better coordinate tourism marketing in the city and to recommend product enhancements according to the chosen direction.” (p. 47).

The plan states that the City’s recreation and culture infrastructure and services make up a major portion of its tourism assets, drawing non-local participation and associated spending in arts and culture interpretation and performances, sporting events and tournaments and heritage appreciation.

The plan also states how a tourism strategy could help foster collaboration and coordination among tourism stakeholders and help to create new tourism packages using concepts such as experience bundling or clustering of tourism assets. Given the clear connections between tourism, recreation and culture, this plan can complement the city’s existing and future tourism planning efforts.

9.4.5  City of Lethbridge Public Art Master Plan

The City’s Public Art Master Plan was adopted in 2012 and defines a long-term vision for public art in Lethbridge. The purpose of the plan is to integrate the City’s current initiatives under a “coordinated framework that provides policy and programming direction to guide the future advancement of public art in Lethbridge.” An important part of the plan is to provide broad guidance with respect to public art site selection. It identifies the Galt Gardens and the downtown more broadly as a focal point for public art. Beyond the downtown, the plan recognizes the potential for parks and open spaces to provide opportunities for public art installations of varying scales and levels of integration. The City’s parks and open spaces provide important meeting spaces for residents and visitors along with opportunities for recreation and formal and informal events.

The plan also recognizes the river valley and coulees as the city’s most defining features and identifies the potential for public artworks that celebrate the local environment. While the plan contains little information about tourism and its relationship with public art, its site selection process—and the specific criteria it uses—have direct relevance to tourism planning as the city determines how best to enhance its tourism assets including the river valley, Galt Gardens, and its parks system.
9.4.6 City of Lethbridge River Valley Parks Master Plan

The City is in the midst of updating the River Valley Parks Master Plan. The purpose of the plan is to set out a long-term vision that will describe the value of the river valley and will guide how the river valley can be used for recreational purposes while balancing the preservation of its abundant eco-diversity. After extensive engagement with the public, the plan has produced a set of nine principles, many of which have direct relevance to tourism. For instance, principles such as “make the valley accessible”, “connect parks and pathways”, and “improve valley amenities”, all have implications for resident and visitor use. Depending on how these principles translate into policy and physical design changes, the river valley has the potential to become one of the city’s premier tourism assets.

9.4.7 Tourism Business Plans

Chinook Country Tourist Association (CCTA)

The primary function of the CCTA is to market Lethbridge and Southwest Alberta as a tourism destination. CCTA provides core programs and services through four divisions:

1. Marketing Services - CCTA coordinates the marketing of Lethbridge and Southwest Alberta as a tourism destination through product development, destination marketing programs and partnered marketing programs.

2. Stakeholder Services—As a stakeholder-driven organization, the CCTA distributes literature, operates the Lethbridge Visitor Information Centre, Chinook Country business promotion by staff, administers exploresouthwestalberta.ca, promotes the destination at travel trade shows and distributes periodic e-newsletters.

3. Destination Marketing Services—CCTA provides stakeholders with access to full scale tourism marketing services including, research, development of strategic, business and marketing plans, implementation of tactics, measurement of return on investment and reporting.

4. Information Services - CCTA operates as a hub of tourism information for both public consumers and the tourism industry. CCTA is most widely recognized for its provision of the Lethbridge Visitor Services Program through the full services operation of the Lethbridge Visitor Information Centre but also provides tourism training and presentations and convention and special event services.


The EDL Business Plan is a guiding framework by which the organization effectively implements proactive strategies that develop and promote Lethbridge as an excellent place to live, learn, invest, visit and do business. The business plan focuses the organization on the following core functions:

1. Business Development: Helping new and existing businesses navigate the city’s business process and creating the right investment climate

2. Meeting & Event Development: Maximizing opportunities to attract business travellers through the hosting of meetings, incentives, conventions and exhibitions, supporting business event organizers and operating as the DMO for business travel.

3. Marketing & Advocacy: Raise the profile of Lethbridge and southern Alberta, enhance provincial and federal connections and ultimately engage citizens to build on community pride.
Sport Tourism Strategy and Business Plan (2014)

The Sport Tourism Strategy and Business Plan was released by Lethbridge Sport Council in 2014. Its purpose is to outline the key goals, objectives and strategies for growing sport tourism in Lethbridge. The plan identifies opportunities and strategic actions in the near, Mid-term and long-term and ultimately aims to transform Lethbridge into a city where quality sport experiences are available to all.

The plan recognizes the city’s many advantages and assets surrounding sport tourism including its history, diversity and strength across many sports, and continued investment; however, it also identifies a number of challenges that require strategic planning and decision-making. For example, the plan recommends that conversations evolve to persuade key decision-makers to elevate and expand the airport in the county to not only serve the residents and business travellers, but sport tourists. A number of other strategies are identified in the plan with the collective goal of securing more funding to help grow sport tourism in Lethbridge.