Existing State of Tourism Management
In Alberta’s Flagship Provincial Parks

Slave Lake Provincial Park
Dinosaur Provincial Park
Cypress Hills Provincial Park
Writing-On-Stone Provincial Park
Kananaskis Country

Paul F. J. Eagles Planning Ltd.
August 2003
This paper has been prepared for Alberta Community Development, Parks and Protected Areas in conjunction with the Alberta Economic Development (AED), Tourism and Services Development Branch. Although these departments extensively contributed to a greater understanding of the tourism management issues faced by Alberta’s parks, the content of this report reflects an independent assessment by Paul F. J. Eagles Ltd.
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1.0 Background

The Alberta Parks and Protected Areas (APPA) Division of Community Development has recently determined through an extensive Marketing Assessment and Visitor Projection study conducted by Western Management Consultants\(^1\) that park visitation at key protected area destinations will substantially grow in the next couple of decades. This finding is incredibly important for Protected Area Managers as decisions made today will determine the quality of outcomes experienced in the future. These management outcomes not only pertain to ensuring park resources are adequately protected but also ensuring visitors have a positive park experience. Paul F. J. Eagles Ltd. acknowledges and commends APPA for taking a proactive step toward understanding how to proceed in managing increased visitation. Now is an opportune time to investigate how to manage an increasing number of park visitors because adopting new management approaches takes time and preparation.

This report is written from the perspective and the belief that park visitation will increase within Alberta’s provincial park system. All provincial documentation and research along with national and international experience suggest that this perspective is legitimate and to be expected. The primary questions that are addressed in this report include: 1) How can APPA manage increased visitation numbers while maintaining the integrity of the park resources?; 2) What is the current capacity of APPA to manage a positive visitor experience at five flagship destinations?; and 3) How might APPA proceed in developing a Best Practices Study that explicates prime management examples which balance high visitation volumes and resource preservation? All of these questions require APPA to think critically about the status quo and how it might affect the parks system in the future if changes, even small changes, are not implemented.

An overarching recommendation that is highlighted throughout the content of this report is for APPA to implement more elements of a visitor management concept (see Appendix A for a list of key visitor management principles). Paul F. J. Eagles Ltd.

encourages this development as it is shown to effectively manage park systems that have high visitation and a dual mandate. Future work in a Best Practices Study which underscores the ability of parks to manage both visitation and resource protection will undoubtedly point to this realization. As such, the observations in this report are made from a visitor management point of view which emphasizes the development and facilitation of positive visitor experiences while ensuring the sustainable future of park resource objectives. Consequently, a critical (and often misunderstood) aspect of the Visitor Management approach to park administration is that management decisions cannot take place without considering the impact of human use on the park resources. Pursuant to this, the overall intention of this report is to demonstrate and analyze the existing state of visitor management infrastructure as a first step to moving toward a new focus on the visitor’s experience, particularly at the five flagship parks that were visited during the July, 2003 site tour.

During the site tour, which took place from July 10th to July 16th, 2003, a tremendous learning experience occurred whereby the tourism management of each flagship protected area was observed firsthand. The site tour group consisted of representatives from Alberta Community Development, Parks and Protected Areas, Alberta Economic Development, Tourism Development and Services Branch, and consultants from Paul F. J. Eagles Ltd. At each flagship site an in-depth tour and meeting occurred with park employees that are responsible for delivering quality visitor experiences. The tourism management observations that are made in this report represent the collection of issues, concerns and ideas that were raised and identified while visiting each protected area site.
2.0 Introduction

There is a tremendous opportunity for Alberta Parks and Protected Areas (APPA) to proactively and incrementally adjust current management practices to facilitate the foreseeable future increases in visitation. High increases in visitation, if left unmanaged, can have devastating effects on the significant resources that are protected within a park and will create negative visitor experiences. There are many ways to manage people within protected areas, yet the option to prohibit visitation is not applicable to park systems that adhere to a dual mandate – resource protection and the provision of visitor experiences. In Alberta, one of the management goals stated by the Ministry of Community Development, Parks and Protected Areas is to encourage “Albertans and visitors to discover and enjoy Alberta’s natural heritage through outdoor recreation and nature-based tourism opportunities”. This goal stipulates that the publicly managed system of parks in Alberta must promote positive visitor experiences. The associated challenge of this goal is to provide such experiences to large volumes of people while maintaining the integrity of the park resources.

Other park systems, both nationally and internationally, have redefined management practices to support increased visitation while balancing the goals of a traditional dual mandate. These changing management initiatives have resulted from growing numbers of people world-wide who want a park experience and an administrative need to find sustainable sources of income to effectively manage positive experiences while protecting the resources. The latter reason has primarily occurred by shifting part of the management costs from the tax payer to the park visitor, thus ensuring an operational budget for each site. What practitioners and academics have found throughout the past decade is that sophisticated visitor management practices can benefit both conservation and tourism. As a result an augmented approach to park management has developed which is termed Sustainable Visitor Management. This new line of reasoning is indeed contrary to some traditional thinking, as it contends that improving the visitor experience, which ultimately increases visitor demand, can better protect and sustain the natural, cultural and historic heritage that is safeguarded within a protected area. There are several reasons why this occurs: 1) sustainable visitor management
practices prohibit the exploitation of resources; 2) positive visitor experiences create a parks constituency; and 3) income retained from visitor programming and services is reinvested into both enhancing the visitor experience and the protection of the resources.

The current situation in Alberta does not warrant the implementation of visitor management practices as a means to increase visitation, rather aspects of the visitor management approach should be implemented as a means to facilitate and manage unsolicited increases in park visitors that are projected to occur throughout the next several years (see Appendix A for a list of key visitor management principles). Developing and institutionalizing tourism management practices well before visitation increases occur is essential. If parks are not able to manage visitors effectively today (i.e. current levels of visitation are impairing park resources) then increasing numbers will further degrade existing infrastructure, and the natural and cultural resources that are to be protected. In such a situation, visitors are seen to be a major problem, when in reality it was the park system that failed to facilitate sustainable visitation through management that encourages the provision of positive park experiences and resource protection.

According to a recent international best practices study on sustainable tourism within protected areas, the benefits of implementing visitor management approaches to park management far outweigh the costs. Historically, not all protected area organizations have fully understood or garnered the benefits associated with creating a positive visitor experience. As a result, it is important to outline the goals of sustainable park tourism at the onset of this report as they have guided the observations that have been presented. There are three overall goals that sustainable tourism planning and development in protected areas aims to achieve: 1) enhance economic opportunities; 2) protect the natural and cultural heritage; and 3) advance the quality of life for all concerned. Each of these goals can be accomplished through well-designed, sustainable, visitor management practices.

As indicated by the first goal of park tourism, a fundamental element of designing and implementing a visitor management approach to resource protection is the capability

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of a parks organization to gain income from visitor services and to retain revenue within the protected area system. The Alberta Parks program has recently gained this capacity and there are now opportunities to earn economic benefit at each park location. Designing an income retention strategy at each park is complex as there are several factors that must be considered and evaluated prior to proceeding. The biggest factor is to first understand how the current employees, local community members/organizations, and visitors feel about the park introducing fees for service. The perceptions held by these important stakeholders form their reality and if there are misunderstandings about management’s intentions prior to introducing new practices then the income retention strategy may fail. During this first stage a communication strategy needs to be devised that educates stakeholders about the benefits associated with the fiscal aspect of visitor management. In Alberta this will be a significant challenge but well worthwhile because the current system, which provides a zero-based user fee in many cases, is not sustainable. By providing a free system of parks to day users managers are not able to effectively understand: 1) visitor use numbers; 2) the extent to which park resources are being degraded by uncontrolled park access; 3) what heritage messages are being consumed by visitors; 4) what income is lost through free day use and the costs associated with resource damage; 5) the lack of appreciation that exists for the costs of management; 6) their ability to mobilize a strong park constituency; and 7) the numbers of people who leave a Provincial Park without knowing they were in a special place.

The terms of reference for this project specify a goal which is to understand the existing state of tourism facilities and programs within five Alberta provincial protected areas (see Box 1). Paul F. J. Eagles Ltd. undertook this task by drawing on extensive domestic and international experience in the protected area tourism management and planning field. The method that was applied to this initial stage of understanding was systematic and experiential. During an in-depth tour of each of five protected areas

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<th>Box 1: Flagship Park Study Sites</th>
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<td>• Writing-On-Stone Provincial Park</td>
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<td>• Kananaskis Country*</td>
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* The Evan-Thomas Provincial Recreation Area within Kananaskis Country could not be adequately assessed for tourism management purposes as a distinct entity to the exclusion of the Kananaskis system of protected areas.
observations were recorded and synthesized according to several management factors (see Box 2). These management factors have been shown to impact successful sustainable tourism development in protected areas and through questioning and examining existing visitor management practices at each site a current account of tourism management has been determined. The findings from this initial study enable the Alberta Parks program, in conjunction with Alberta Economic Development, Tourism Development and Services Branch, to clarify the tourism management areas that should be highlighted within the next stage of planning. Again, because this project is about tourism, which analyses the ability of APPA to manage sustainable park visitation, several aspects of the visitor management approach to park administration are presented as a recommendation from Paul F. J. Eagles Ltd. The recommendation to implement aspects of a visitor management approach accomplishes two objectives: 1) it provides a variety of well-established frameworks for managing the visitor increases that are projected to occur in the future (e.g. Limits of Acceptable Change, Visitor Impact Management, and Recreation Opportunity Spectrum); and 2) it enables visitor growth to occur while ensuring quality visitor experiences and the protection of park resources. As such, at the conclusion of this report, recommended subject areas for a sustainable tourism Best Practices Study are outlined based on the needs determined from this investigation.

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For more information about each of these factors see Appendix B
It is important to recognize that the findings from this familiarization study are unique to Alberta. All observations presented are made according to an awareness and respect for the policy documents of each park and the legislative instruments that govern them. Prior to visiting each location, the management plans and the Alberta Provincial Parks Act were studied in order to understand the existing tools that govern current management practices. Consequently, all observations and recommendations are believed to be realistic and within the realm of future management possibilities. In addition, nature-based tourism expertise derived from extensive global protected area experience and academic knowledge was applied to this analysis. As a result, a comparative lens was used to evaluate the existing tourism management practices at each site.
3.0 Visitor Travel Experience Process

The primary notion behind sustainable tourism in protected areas is the creation of optimal visitor experiences while maintaining the integrity of the resources preserved within the site. A simple theoretical underpinning for this concept is the Visitor Experience Process (see Box 3). In order to establish positive, meaningful and memorable experiences for visitors, park systems and managers must consider each aspect of the experience continuum. This process starts with the recognition of a site as a potential tourism opportunity. This is followed by a decision to visit and planning for the trip. The travel-to the site, on-site experiences and travel-from the site constitute the core travel experience. Recollection is the very long stage after the visit. One step of the visitor experience cannot be effectively managed without recognizing the roles of all the others. Too often protected area organizations only manage a visitor’s on-site experience while leaving the other steps to outside parties (e.g. travel magazines, word-of-mouth, local tourist information centres). This tends to occur because the on-site experience is the only step that is under the direct authority of the park managers and the one that earns tangible income. However, parks organizations need to be actively involved in the steps on either side of the on-site experience because they significantly influence a visitor’s expectations, experiences and willingness-to-pay. This section explains what park organizations can do and why they must be involved throughout the visitor experience process.

Box 3: The Visitor Travel Experience Process

Recognition → Planning → Travel-To → On-Site Experience → Travel-From → Recollection

Step 1: Recognition

People find out about parks and protected areas from various sources, which range in terms of credibility and appeal. The most common information sources are: 1) friends and relatives; 2) previous personal experiences (i.e. childhood vacations or
educational encounters); 3) internet research; and 4) brochures/books/road maps/videos. In almost all cases, parks organizations are underrepresented as a source in this stage of the process, yet when they are used they are usually considered to be highly credible. A critical step occurs when the potential visitor decides that a site is a reasonable destination, one worthy of future consideration. Parks organizations need to become more aware of the role they can play in controlling the tourist destination profile attributed to each protected area within the system. This can be done in part by developing a close working relationship with Visitor Information Centres and Tourism Destination Regions. Creating the visitors desire to visit and creating the appropriate expectations are very important first steps.

**Step 2: Planning**

During this planning stage of the process potential visitors determine if they should invest their time and money into a particular park destination. Opportunity costs are weighed in terms of the values, attributes and benefits that are ascribed to various leisure and travel options. Some of the critical factors that play a role during the decision-making phase are: 1) ease of access to information (e.g. central information system for all sites); 2) quality of information (i.e. levels of service, facilities, recreation opportunities etc…); 3) available time for travel; 4) cost; and 5) expectations. The competing opportunities play a critical role. Park organizations need to establish a visitor marketing and information program that facilitates all elements of visitor planning. This is a vital step of sustainable tourism management because it assures appropriate levels of access, program and facility expectations and subsequently responsible behaviours while visitors are on-site.

**Step 3: Travel-To**

When visitors travel to the park or protected area adequate transport facilities are critical. The availability of air, rail and road access all help to determine travel choice. Road conditions and effective signage are very important. This step in the visitor experience process offers a simple opportunity for park organizations to positively impact the image and character of the park. It is critical for travellers to know they are on the right path and that the destination is looking forward to their arrival. Signs should be
posted well in advance of the park on all major travel routes. In addition, visitors should know when they arrive at their destination. A sense of arrival should be accomplished by a park gateway where visitors clearly recognize and appreciate their arrival at a special place. They should be able to stop and receive information. At no point during this step should visitors feel confused about how to proceed or where they begin their on-site experience.

**Step 4: On-Site Experience**

The on-site experience is undoubtedly the most important part of the trip. During this step expectations are exceeded, met, or unattained. In fact, 99% of protected area organizations concentrate all effort and resources on the on-site experience, often to the exclusion of the other steps in the process. If visitors do not have a positive experience during the first steps of the process, park employees will have to spend time alleviating visitor concerns. Conversely, the on-site experience should build upon an existing positive visitor experience by reinforcing the values, attributes and benefits the park has to offer.

**Step 5: Travel-From**

As with the travel-to step in the visitor experience process, a clear sense of leaving the park should be established which evokes awareness within the visitor that they are leaving a special place. Linkages to other protected area destinations and other destinations of interest to park visitors should be communicated through effective signage for people leaving the park. This is where a regional tourism integration plan can assist visitors who wish to experience other protected areas within the nearby area and more widely through the overall park system, or experience other compatible regional attractions.

**Step 6: Recollection**

The recollection phase is the longest part of the visitor experience and it is most often overlooked by park organizations. This phase lasts the rest of a visitor’s life and it is the period that determines whether or not a visitor will return to the site or other similar sites within the park system. It is also a critical period for word-of-mouth
communication which has a significant effect on whether other potential visitors decide to visit the site. Park organizations can contribute positively to this step by creating memory milestones. These are tangible relics or artefacts that spur and stimulate memories. Coincidently, the word *souvenir* translates into ‘things to remember’. During the recollection period people make grand plans for spare time, vacations and retirement. This kind of nostalgia is a powerful force in a visitor’s life and it benefits the park tremendously because it nurtures and solidifies a strong park constituency. Park organizations need to provide more methods and approaches for reinforcing positive visitor emotions following an on-site visit. Such an effort will affect future travel choices, influence other people’s travel choices, and establish an impetus for making donations of time or money.

The recollection phase is also the period where former visitors strive to preserve what is meaningful to them. If the visitor experience is positive, stewards will arise to make sure the park is ecologically, culturally and politically protected. As such, park organizations need to make a plan for involving people (even vicarious visitors) in a substantial role. This is important because these people may assist with raising funds, donating time or money, building political support, or they may provide support to managers.
4.0 **Protected Area Visitor Experience Analysis**

The results of the protected area tourism analysis are presented sequentially for each flagship site that was assessed. In order to simplify and organize the observations that were made during the familiarization visits a SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats) was conducted. Therefore, the discussion for each site follows a similar format: 1) A destination profile that outlines the cultural relevance of the protected area to park visitors; 2) tourism strengths; 3) tourism weaknesses; 4) potential tourism opportunities; and 5) threats that could hinder the success of tourism development at the park.

4.1 **Lesser Slave Lake Provincial Park**

*Destination Profile*

Lesser Slave Lake Provincial Park is home to the largest fresh water lake wholly within Alberta, located three hours north of Edmonton. This flagship provincial park is situated within Canada’s ecologically celebrated boreal forest and it provides visitors with good recreation opportunities including a seven kilometre long sand beach, family camping facilities and services, a nine-hole golf course (being expanded to 18 holes), wildlife and landscape viewing from within the forest environment and atop Marten Mountain Viewpoint, which overlooks the majesty of Lesser Slave Lake.

*Tourism Strengths*

The major tourism strengths attributed to Lesser Slave Lake Provincial Park include the following:
- A clean and cool fresh water lake;
- A large undeveloped sand beach;
• Good campground infrastructure;
• Good interpretive program;
• The Marten Mountain viewpoint;
• Nearby town-based tourism infrastructure to support park visitors;
• An emerging bird education and tourism program;
• Money that is now available to build the Boreal Centre for Bird Conservation in the park, enhancing the research, education and tourism services. The new financial model, including revenue and reinvestment, should be kept in mind (e.g. store front merchandise, space for local artisans, rotate visually attractive displays to keep visitor information fresh and new);
• The Centre will provide accommodation options for both researchers and visitors;
• The Centre and its programs will extend the park constituency to national and international volunteers and scientists;
• The Freighter Lakeshore Trail system which links the park to the town and is part of the Trans Canada Trail system;
• Strong local interest in some of the park’s resources (i.e. the beach); and,
• The resourcefulness, experience and passion of staff members such as Frank Fraser – Heritage Appreciation Team Leader (e.g. manager of volunteer program, catalyst behind the bird observatory, and resolves program funding gaps through grant applications and sponsored employment programs).

Tourism Weaknesses

The major tourism weaknesses that currently exist within Lesser Slave Lake Provincial Park include:

• The public road through the centre of the park limits the ability of managers to effectively control the visitor experience;
• The exit from and entrance into the Park is muted and somewhat hidden amongst other conflicting signs and developments;
• There is unfettered and open day use;
• The park does not capture direct economic benefit from public day users;
• The park has no website to guide, inform or involve visitors;
• The park does not have a campground reservation system;
• There is no centralized, province-wide campground pre-registration system for APPA run by a single entity that allows provincial park visitors to easily plan for and secure camping accommodation at the park. This limits tourism utilization and the ability of site managers to plan and prepare for upcoming use and effective visitor experiences (note: The Ontario Parks Agency provides an excellent example and model of a system-wide campsite registration system: visit www.ontarioparks/english/reservations.html); and,
• There is currently too few staff to effectively manage an optimal visitor experience.

**Tourism Opportunities**

There are three significant areas that can be addressed at this site to improve tourism opportunities:

• Actively establish and promote a specialized bird research and observation market. This development can be used as a funding vehicle to enhance facilities and visitor opportunities;
• Design a regional integration plan to promote the park’s resources, including the beach and lake recreation value; and,
• Work with local town officials and Tourism Associations (e.g. Alberta North Tourism Destination Region & Big Lake Country Tourism Association) by gaining access to Board representation in order to better develop local and regional tourism plans that reflect visitor opportunities in the Park.

**Tourism Threats**

Several threats to current and future tourism development were observed during the site visit. The following points outline what issues should be assessed in greater detail in order to enhance visitor experiences:

• The presence, location and design of the boardwalk on the beach demonstrates the weakness of the existing approval and construction processes (i.e. the ability of political interference to supplant the management planning process);
• Weak regional tourism planning could eventually lead to social problems because local communities are forced to adapt to increasing tourism numbers and are unable to work with the park on tourism planning;
• There is visible environmental degradation from open and unfettered day use activity, especially along the beach; and,
• Economic benefits are not currently captured from some day use activities or services which hinders the Park’s ability to finance operational improvements or repairs that enhance visitor experiences and protect park resources.

4.2 **Dinosaur Provincial Park**

*Destination Profile*

Dinosaur Provincial Park is internationally renowned for its rich dinosaur fossil deposits and was designated as a UNESCO World Heritage Site in 1980. This unique setting in south-eastern Alberta provides visitors an exceptional opportunity to view and learn about palaeontological features, the badlands landscape and various endangered, threatened and rare species and habitats like the cottonwood riparian habitat, that characterize the Park. Visitors can enjoy guided interpretive bus tours throughout the badlands where dinosaur remains have been found, self-guided hiking trails, specialized education and interpretive programs, and campground facilities and services.

*Tourism Strengths*

There are several strengths associated with the existing visitor management regime within Dinosaur Provincial Park such as:
• The World Heritage Site designation signifies an internationally recognized level of importance and relevance to all people;
• The visitor use numbers are modest when compared to other similar sites worldwide;
• The Park has an established international profile;
• The average visitor is on a knowledge quest;
• There is currently high demand for personal education and interpretive services;
• The park protects spectacular badlands and globally significant palaeontological resources;
• The demand for public use exceeds the supply;
• A Friends group exists; and,
• Competent and effective staff.

Tourism Weaknesses

In terms of effective visitor management there are a number of factors that need to be explored in order to create a more sophisticated visitor experience:

• The current Management Plan is designed to react to increasing visitor demand, rather than proactively state policies to manage rising visitor numbers;
• The current Management Plan was developed in a period of fixed and declining budgets, therefore visitor use was clearly a stress and not a financial benefit;
• There is a major deficiency in the provision of a full range of accommodation opportunities either in or near the park;
• There appears to be weak regional tourism integration;
• The bus tour capacity is limited by the number of staff and buses, not by public demand, willingness to pay, or resource capacity;
• The Friends Group is underdeveloped and needs to play a more active role in park management;
• The pricing policy for both programs and services is immature;
• There are very poor levels of information on day use visitors;
• There is a weak public use measurement and reporting process;
• Although the park website is sophisticated, it is difficult to access through the Community Development web-forum (note: visit www.mnr.gov.on.ca/MNR, to see the obvious link to Ontario Parks main webpage on the first page of the Ontario’s Ministry of Natural Resources website. In Alberta this weakness may be a result of poor overall Provincial Park system branding).

• The reservation system for tours is weak – visitors should easily be able to book tours months in advance whether online or by phone (note: it is problematic that tour reservations can only be made by phone and there is no toll-free number for visitors outside of Alberta. It was explained during the site tour that international visitors are sometimes turned away);

• There is no centralized, province-wide campground pre-registration system for APPA (whether by phone or online) run by a single entity that allows provincial park visitors to easily plan for and secure camping accommodation at the park. Although Dinosaur Provincial Park does have its own phone-in pre-registration system it requires non-local visitors to call long-distance and if the campsite is full, the system is incapable of referring visitors to other parks that have space available. This limitation affects the ability of site managers to adequately plan and prepare for upcoming use and effective visitor experiences. It also limits APPA’s ability to influence park visitation at other sites that can accommodate higher use levels during the peak tourism season; and,

• There is too few staff to effectively manage an optimal visitor experience.

Tourism Opportunities

Due to the significant and outstanding features within the park there are many opportunities that exist:

• There is a major opportunity to benefit economically from the demand levels that currently exceed supply (i.e. an opportunity to implement fees for value-added services);

• There needs to be a substantial expansion of the capacity for visitors to participate in membership activities through a more active and engaging Friends Group;

• Money is now available to expand the visitor centre, this expansion can be undertaken with the new financial management model in mind;

• There is major potential for market segmentation which results in product diversification (e.g. segment markets according to education, experience, age, group affiliation, interests, etc.). This provides a significant opportunity to improve visitor experiences by adding personalized value while raising park revenue through appropriate activity fees. For example, 1) target the conference market in the shoulder season by providing specialized bus tours and programs; 2) create daily trip itineraries for visitors who plan to stay one day or more; 3) expand school group programs to include more specialized services that focus on the riparian habitat or palaeontological features; 4) offer photography clinics; and/or 5) art workshops;
• Consider generational and pilgrimage programs for visitors who return years later. Layer information to match client knowledge and experience (i.e. what can people gain by returning again?); and,
• There is an ability to expand the number of visitors both regionally and internationally.

Tourism Threats

The tourism threats that were observed during the familiarization visit include:

• There is some noticeable impact on the landscape in those areas where public, uncontrolled and open, access is permitted (i.e. mountain biking, canoeists who exit the Red Deer River within the park boundary);
• Unsupervised public day use cannot increase without considerable damage to the site;
• Weak regional tourism planning could lead to social problems as local communities are forced to adapt to increasing tourism numbers; and,
• Full economic benefits are not currently captured from some day use activities or services which hinders the Park’s ability to finance operational improvements or repairs that enhance visitor experiences and protect park resources.

4.3 Cypress Hills Provincial Park

Destination Profile

Cypress Hills Provincial Park is the first and only Interprovincial Park in Canada and it is situated on the Alberta-Saskatchewan border. For over seven thousand years the Cypress Hills have been visited by people who have recognized the uniqueness and mystery of these uplands in the midst of the Great Canadian Plains. Today, visitors can experience the wonder of the Cypress Hills year-round as there are a variety of activities and facilities including boating, camping, cross-country skiing, downhill skiing, fishing, golfing, hiking, interpretive programming and more.

Tourism Strengths

There are several major tourism strengths that exist in the Cypress Hills Provincial Park:
• There is a diversity of year-round recreation opportunities based on water, prairie landscape, and hills;
• The park has a national profile;
• The outdoor recreation infrastructure is well-developed;
• The park has a visitor centre;
• The archaeological site at the Stampede Grounds is of pre-history and cultural significance;
• Money is now available to expand the visitor centre, this expansion can be undertaken with the new financial management model in mind; and,
• Cooperation exists between the governments of Alberta, Saskatchewan and Canada for managing and promoting the values and activities at Cypress Hills Provincial Park.

**Tourism Weaknesses**

The following bullets indicate areas that should be addressed in order to optimize visitor experiences at this site:

• The number of visitor days that are designated for wildlife viewing is greater than the number of visitor days designated for hunting – yet, the hunting practices permitted in the park severely impact the quality of wildlife viewing year-round;
• Cattle grazing is inconsistent with heritage messaging within the park. Bison grazing rather than cattle grazing would be more appropriate;
• Hunting activities reduce the general outdoor recreation season;
• There is a general lack of accommodation choices (low-cost to high-cost) in or near the site;
• The Friends Group could be more active in raising revenue for the park;
• There is too few staff to effectively manage an optimal visitor experience;
• There is a lack of an appropriate visitor entrance into the park (i.e. a park gate);
• The campground is privately run, earns a profit and the park does not gain any income from this campground;
• There is modest local or regional awareness that Cypress Hills is a provincial park (i.e. local/regional residents often call the area Elkwat er primarily because they are familiar with this area and are not aware of the larger context. This is one outcome of no gate.
and no day use fees (note: cottagers who live in the Park should receive an annual park day use pass that is covered in the yearly land lease fee agreement);

- There is an entrenched cottage community that overwhelms most other user groups;
- The vocal cottage community absorbs a disproportionate amount of the park’s resources and staff time (note: cottagers should be informed about the costs associated with park management [i.e. 80% of park maintenance budget goes to the townsite] and a cost-recovery program should be developed that eliminates the current subsidy being provided to the cottagers on an annual basis); and,
- There is no centralized, province-wide campground pre-registration system for APPA (whether by phone or online) run by a single entity that allows provincial park visitors to easily plan for and secure camping accommodation at the park. Although two campgrounds at Cypress Hills Provincial Park have a phone-in pre-registration system it requires non-local visitors to call long-distance and if the campgrounds are full, the system is incapable of referring visitors to other parks that have space available. This limitation affects the ability of site managers to adequately plan and prepare for upcoming use and effective visitor experiences. It also limits APPA’s ability to influence park visitation at other sites that can accommodate higher use levels during the peak tourism season.

Tourism Opportunities

The tourism opportunities that can be gained at this site include:

- Cypress Hills Provincial Park can encourage more cooperation among Alberta, Saskatchewan and Parks Canada regarding tourism marketing and site management (e.g. Trans Canada travellers should be made to feel that the park is a ‘must-stop’ destination);
- The park can replace cattle grazing with a policy that encourages bison grazing. This will keep interpretive heritage messaging consistent and will add significantly to the visitor experience and ecological integrity of the site (note: the June 2003 edition of Time Life magazine issued a special edition on America’s National Parks – a centrefold picture illustrated the attractiveness of bison grazing in Theodore Roosevelt National Park, North Dakota);
- There is the opportunity to substantially expand the capacity membership activities and activity level of the Friends Group;
- There is an opportunity to develop specialized interpretive programs based on the Stampede Ground Archaeological Site;
- There is an opportunity to encourage local agricultural tourism;
- There is an opportunity to expand the
existing well-established education programs with local school children (i.e. the church camp facilities are ideal for overnight residential environmental education programs for school children). Such activities should be priced accordingly; and,

- There is an opportunity to strategically segment visitor markets and diversify activity products in order to provide a range of activities that vary in cost. An example of a price/product differentiation program for mountain bike groups/associations could be: 1) develop and market a park endorsed mountain biking trail system; 2) provide a 3 hour interpretive mountain bike tour; 3) develop an overnight or multi-day interpretive mountain bike tour through the Cypress Hills Interprovincial Park system.

Tourism Threats

There are three threats that should be carefully monitored as they may hinder tourism development in the future:

- A weak regional tourism plan could lead to social problems as local communities adapt to increasing tourism numbers;
- Cattle grazing of the prairie, rather than bison grazing of the prairie, negatively effects ecological attractiveness; and,
- Economic benefits are not currently captured from some day use activities or services which hinders the Park’s ability to finance operational improvements or repairs that enhance visitor experiences and protect park resources.

4.4 Writing-On-Stone Provincial Park

Destination Profile

Writing-On-Stone Provincial Park is a hidden gem within the Alberta Provincial Park system. It is located near the province’s southern border and it captures the beauty of the Milk River landscape through hoodoo rock formations, steep sandstone cliffs and aboriginal history. This special place is nationally and internationally significant because of the diversity of habitats, landscapes and remarkable archaeological resources that complement the regions natural features. This park protects the largest collection of native rock art in North America. Visitors can enjoy a rich cultural experience by taking an interpretive bus tour of the

Photographed by: Dawn E. Carr
native rock art, walking on a self-guided trail that highlights a prominent petroglyph site or exploring an historic reconstructed Mounted Police Post from the late 1800s. There are also several recreation opportunities for visitors including camping services and facilities, interpretive programming at the amphitheatre, floating/tubing down the Milk River or relaxing at the beach.

Tourism Strengths

The following major strengths are important for tourism purposes:

- The park protects internationally significant petroglyphs;
- Spectacular features such as the prairie, gorge, hoodoo formations and hill landscape;
- The tourism demand is high and increasing, even in the absence of a sophisticated tourism information system;
- The staff is dedicated, effective and knowledgeable; and,
- There is an emerging positive relationship with the Blackfoot people.

Tourism Weaknesses

In order for there to be optimal visitor experiences at this site there are a number of factors that need to be explored:

- More than any other site visited during this project, this site exhibited the need for more staff to help manage visitor experiences;
- The only accommodation choice for visitors, within a one hour drive of the site, is the camping facilities and services located in the park;
• The park does not have a campground reservation system;
• There is no decentralized, province-wide campground pre-registration system for APPA (whether by phone or online) run by a single entity that allows provincial park visitors to easily plan for and secure camping accommodation at the park. This limitation affects the ability of site managers to adequately plan and prepare for upcoming use and effective visitor experiences. It also limits APPA’s ability to influence park visitation at other sites that can accommodate higher use levels during the peak tourism season;
• There is a lack of an appropriate entrance into the park;
• The on-site, first-come-first-serve system for picking up bus tour tickets hinders international and long distance travellers who wish to plan in advance;
• An inadequate interpretive program reservation system causes many visitors to be turned away when the tour tickets are released one-hour prior to departure;
• Tour funding is on a volunteer donation basis;
• The park has no website to guide, inform or involve visitors;
• The Blackfoot culture and belief system may limit the diversity of opportunities for generating revenue associated with the cultural heritage of the park; and,
• There is limited local community involvement with the park.

Tourism Opportunities

There are several tourism opportunities at Writing-On-Stone Provincial Park that can enhance the current visitor experience:

• The money set aside for the first phase of a new visitor centre (i.e. park office, reception area, and visitor staging area) enables there to be a completely new approach to park visitation;
• There is an opportunity to involve First Nations people in planning the visitor centre and through such partnerships additional funding may become available for aboriginal tourism initiatives (note: a significant aboriginal presence should be promoted at the new visitor centre through spiritual artefacts, teepee interpretation, and local artisans);
• The new financial business model can be a critical element in the redesign of the park entrance and the visitor centre;
• There is an emerging European market for aboriginal tourism;
• The local rodeo stampede grounds are only used once per year and may disappear which would benefit park tourism because rodeo activities threaten the safety of the petroglyphs, are not central to the park’s interpretive theme, and the chain-link fence that defines the park boundary is obtrusive and unattractive;
• There is an emerging ability to have local aboriginal people interpret the rock art;
• The demand is currently exceeding supply which demonstrates there is an opportunity for the park to obtain additional revenue in the future;
• There is an opportunity to develop a long-term vision for cultural heritage, natural heritage, aboriginal culture and tourism (note: this should be part of the management plan);
• The designation of a National Historic Site with widespread community support can improve the perceived local image and importance of the park;
• The possible UNESCO World Heritage Site application will heighten the park’s ability to preserve and protect the cultural and natural resources; and,
• There is an opportunity to encourage local agricultural tourism.

**Tourism Threats**

The tourism threats that were observed during the site visit include:

• The rodeo grounds and activities are close to the petroglyphs;
• The current ability of the park to deal with demand that exceeds supply is a threat to the integrity of the petroglyphs;
• Retirement and succession planning is needed;
• A weak regional tourism plan could lead to social problems as local communities are forced to adapt to increasing tourism numbers; and,
• Economic benefits are not currently captured from some day use activities or services which hinders the Park’s ability to finance operational improvements or repairs that enhance visitor experiences and protect park resources.

### 4.5 Kananaskis Country

**Destination Profile**

Kananaskis Country is a unique and valuable conglomeration of protected areas that cover over 4,000 square kilometres of foothills and mountains, due west of Calgary. This system of parks provides spectacular viewscapes of the Rocky Mountains and offers a multitude of outdoor recreation experiences for all types of visitors. Throughout Kananaskis Country visitors can enjoy backcountry hiking and camping, downhill and cross-country skiing, full-service campground facilities, a range of accommodation alternatives, interpretive programming, paved biking trails, and a 36-hole golf course.
Tourism Strengths

As a system of protected areas Kananaskis Country has a tremendous amount to offer visitors. The major tourism strengths that currently exist include:

- The proximity to the major urban centre of Calgary, and rapidly growing Town of Canmore;
- Spectacular scenic natural resources that include mountains, rivers and lakes;
- Kananaskis Country is emerging as a single unified destination;
- The infrastructure throughout the system of parks is consistent, well-designed and well-constructed (e.g. park buildings);
- There are a wide range of recreation opportunities; and,
- Kananaskis Country is a four-season destination.

Tourism Weaknesses

The tourism weaknesses currently limiting an optimal visitor experience include:

- There is a confusing administrative structure with a wide range of protected area categories, uses and administrators;
- There is too few staff to effectively manage an optimal visitor experience;
- There is a lack of an appropriate visitor entrance into Kananaskis Country (i.e. a visitor park gate);
- The budget for maintenance is below the current management requirements (e.g. visible trail erosion); and,
- Mid-range accommodation opportunities are underrepresented.
- There is no centralized, province-wide campground pre-registration system for APPA (whether by phone or online) run by a single entity that allows park visitors to easily organize camping accommodation within Kananaskis Country. Although individual campgrounds within Kananaskis Country take reservations, they require visitors to know about each location and to call more than one site in order to inquire about campground availability. A central park reservation system would not only be
beneficial to visitors it would allow site managers the ability to adequately plan and prepare for upcoming use and effective visitor experiences. This weakness also limits APPA’s ability to influence park visitation at other sites that can accommodate higher use levels during the peak tourism season.

Tourism Opportunities

The tourism opportunities that have been identified for Kananaskis Country include:

- There is an opportunity to create an identifiable and unified image with an associated simplified administrative structure (i.e. consolidate management practices and identities);
- The current Volunteer Program can be expanded and fostered to further management objectives by promoting positive social reinforcement through volunteer group activities;
- Kananaskis Country can expand the accommodation opportunities by providing a mid-range option; and,
- There is an opportunity to unify a pre-registration system for Kananaskis Country.

Tourism Threats

Several threats to current and future tourism development were observed during the site visit. The following points outline what issues should be assessed in greater detail in order to enhance visitor experiences:

- The lack of common maintenance standards across the system of protected areas could cause differentiated visitor experiences (i.e. acceptable trail surface erosion along hiking trails should be consistent);
- Oil and gas industry, forestry, cattle grazing and hunting threaten the integrity of tourism resources in those areas of Kananaskis Country where these activities are permitted;
- A weak regional tourism plan could lead to social problems as local communities are forced to adapt to increasing tourism numbers and are unable to sufficiently influence the tourism planning; and,
- Economic benefits are not currently captured from some day use activities or services which hinders the Park’s ability to finance operational improvements or repairs that enhance visitor experiences and protect park resources.
5.0 Conclusion

The observations that have been made by Paul F. J. Eagles Ltd. for each of Alberta’s flagship provincial parks visited indicate that the existing state of tourism management across the system is modest. As demonstrated through an analysis of each site, there are several tourism strengths that can be built upon and supported if more enhanced visitor management practices are adopted. This is good news. The flagship sites are very diverse and all of them have something different and special to offer Albertans, Canadians and the international market. There are several weaknesses however, that should be addressed in order to develop meaningful and effective visitor experiences. These weaknesses all contribute to an immature park system that cannot yet reap the full benefits afforded from a strong visitor constituency. If the people who visit parks are well managed through the provision of excellent facilities, activity options that do not impair park resources, and high levels of service quality, they can bolster support for increased resource protection by ensuring adequate levels of funding.

There are also several tourism opportunities for all flagship sites in this report to work toward. Many of these opportunities relate directly to inadequate attention given to the visitor experience process. It cannot be emphasized enough the importance of understanding and pursuing sustainable methods for ensuring visitors have enjoyable and memorable encounters throughout their park experience. To reiterate, sustainable tourism management practices enable parks systems to achieve both a resource protection goal and a visitor enjoyment goal. The threats that have been identified are specific to each park, although there is overlap among the observations. These threats are presented with tourism in mind and they may conflict with the needs or wants from other user-groups. Undeniably, initiating a visitor management approach for the protection of parks and protected areas will require trade-offs between and among user-groups. However, maintaining a consistent policy approach across the flagship sites which is focussed on visitor management will help to ease user-group conflict and tourism threats by demonstrating systematic decision-making rules.

The common themes and characteristics that were observed among the five sites during the SWOT Analysis are presented below. These overall comments highlight the state of the existing tourism management practices within the Alberta Provincial Parks
and Protected Areas system, particularly within the five flagship parks that were visited and assessed. The observations provide an inventory of tourism management issues that are deemed important and relevant as determined by Paul F. J. Eagles Ltd. They are not prioritized because any judgement on precedence should occur through a system-wide or specific site, strategic visitor management and planning effort. Many of these observations should be celebrated and others should provide a realistic glimpse into future possibilities. What is certain from this investigation is that the five flagship sites in this report are of tremendous value to people everywhere and, as projected by the Western Management Consultants, the demand to experience what they have to offer is going to grow.

OVERALL TOURISM STRENGTHS

- The employees encountered at all sites are highly skilled, motivated and committed;
- There is increasing morale with the potential opportunities revealed by the new administrative structure;
- Alberta Parks and Protected Areas now have revenue retention capabilities;
- Each site is unique, valued and has attractive landscapes;
- There are many parks and protected areas in Alberta with well-established public tourism profiles;
- All the sites visited have an existing visitation profile (i.e. the tourism markets are known);
- All flagship sites have a well-established culture;
- All flagship sites have good transportation linkages;
- All sites visited have some form of interpretation, information and education;
- All sites have a minimal budget sufficient for low-levels of operation;
- There is an evolving and well-managed Camper Satisfaction measurement process;
- All sites have a moderate level of tourism use compared to other similar parks both nationally and internationally given the size of the area and the facilities;
- The flagship parks and protected areas are all emerging as part of the culture of the province; and,
• Within the system there is a wide range of natural, recreational and cultural opportunities that are uniquely different at each site.

OVERALL TOURISM WEAKNESSES

• The park organization is not fully developed as a sustainable visitor service institution;
• All site management plans do not include specific objectives regarding how they plan to achieve optimal visitor experiences;
• All site management plans do not include a long-term vision or a set of future goals for park tourism;
• All sites do not have visitor experience marketing plans;
• There are no procedures for rewarding staff for excellent levels of visitor service;
• There is too few staff for maintaining an optimal visitor experience;
• The staff numbers are insufficient for providing programs and services at an accepted international standard;
• There is an apparent lack of expertise in tourism, marketing, and pricing policy in the Agency;
• All sites have visible environmental degradation caused by ineffective finance and management;
• There is often weak regional tourism integration
  • There is little or minimal cross-product marketing
  • The local communities generally do not understand the park tourism role
  • There is no ongoing procedure for regional linkage between local communities and the park;
• There is little coherent provincial branding of the parks and protected areas network as a whole and little effective branding of flagship parks other than Kananaskis Country;
• There is a weak and not easily accessible information system describing the sites, resources, programs, facilities, recreation opportunities, and use levels (note: see Ontario Parks for an example of a well-developed, functional and easy to access website: www.ontarioparks.com). When visitors enter “Alberta Provincial Parks” in an Internet search engine, they should not be directed to http://www.cd.gov.ab.ca/
They should be directed to a cohesive and visually attractive system-wide park website that provides additional park information that includes other travel services, regional attractions, weather, and local accommodation choices.

- There is no standardized, province-wide registration system for site facilities and programs;
- There needs to be a systematic method for measuring and reporting visitor satisfaction for day users;
- There is a general lack of a gate concept (i.e. an obvious sense of arrival);
- Failure to capture economic benefit from day users results in: 1) a poor understanding of visitor use numbers; 2) site degradation; 3) reduced income; 4) lack of effective heritage messaging; 5) lack of visitor appreciation for the costs of management; 6) weakness in constituency development; and 7) a lack of understanding or awareness that Alberta’s protected areas are special places. (note: The following study found day users spend on average $208/day locally while the average overnight camper spends $28/day. Bowman, M., 2001. Economic Benefits of Nature Tourism: Algonquin Park as a Case Study. M.A. thesis, Department of Recreation and Leisure Studies, University of Waterloo, Waterloo. 300pp.);
- There is usually a lack of a full range of accommodation opportunities, that is a range including backcountry/backpacker camping, front-country non-serviced campsites, electrical/RV camping, permanent tented accommodations (i.e. tents, tepees), and a range of roofed accommodation (from hostels to hotels/ecolodges). This negatively impacts tourism opportunities at each location;
- Weak existing reference pricing occurs due to the current fees being well below production cost;
- Currently every visitor counts as a financial loss to the park;
- The old administrative system is designed to turn visitors into a problem (i.e. every visitor costs the park more than the park gains in benefit – the park is unable to recover the costs of providing a service – every visitor erodes the resource slightly);
- The private sector has dropped the operation of all campgrounds that are not financially viable, which leaves the government to provide this valuable service;
- Parks receive no income from the privatized campgrounds that earn a profit; and,
- The Provincial Park system loses the opportunity to cross-subsidize other park campgrounds that are not financially viable because the profitable campgrounds are privatized.
OVERALL TOURISM OPPORTUNITIES

- There is an emerging linkage between Alberta’s tourism and parks agencies which will enable the development of regional tourism planning;

- There is an opportunity to create a “flagship park” brand for effectively marketing these sites. An example that illustrates the benefit of this notion is the Ontario Parks Guide which is the premier marketing publication for Ontario Parks. Corporate partners’ advertisements and in-kind donations pay for the publication and almost one million are distributed annually;

- There is an opportunity to package these flagship sites with other complementary regional attractions (e.g. Head-Smashed-In Buffalo Jump), accommodation, and tourism services;

- The flagship sites contain many of the most significant natural, cultural and aboriginal resources within the Province of Alberta, thus allowing the Parks Agency the opportunity to be seen as the intermediary that protects, manages and interprets these resources for the people;

- Many people strongly recognize the value and importance of these sites which will help persuade users that management changes are necessary for the protection of the resources;

- The Alberta Parks organization can gain social capital by involving and developing local and provincial community support and improving sustainable visitor management programs and services. These two actions will build and prolong political support.

- There are many potential income sources that are currently unexploited, for example:
  
  - All sites could expand their interpretive programs to include specialized services at a cost to the visitor (i.e. people will pay for a value-added experience);
  
  - All sites would gain economic benefit from a campsite/program registration system because payment would be received in advance of the visitor arriving. In addition, a campsite/program registration fee would be withheld in the case of cancellation. These prepaid funds could be used to improve visitor infrastructure and resource protection before flagships site campgrounds/programs open for the season; and,
• The Alberta Parks program has not pursued significant corporate partnerships (e.g. Ontario parks received over $2 million in benefit in 2001 from such partnerships);

• The revenue retention capacity is an opportunity to transform the organization into a more client-focused organization;

• Increased visitor satisfaction through better visitor management will lead to a stronger political parks constituency; and,

• There are several opportunities to increase the role of Friends Groups within each park (e.g. solicit tourism operators and tourism businesses as board members).

OVERALL TOURISM THREATS

• There is a general lack of societal appreciation for the cost of park management;

• Nature is often seen as being free;

• There is a general lack of appreciation in the park users for the cost of park management. This is not surprising since they are not consistently told about the costs of management;

• The increases in visitor use levels is leading to increasing conflict levels between user groups;

• Ongoing weak management results in some ecological and cultural depreciation;

• A major threat is public concern toward the impacts of tourism income:
  • For example: There could be high levels of resistance toward increasing user fees unless the fees can be shown to directly benefit the users through the protection or improvement in facilities, services, and/or resources;
  • For example: The currently low reference points of fees for all park facilities and services leads to a major problem in raising prices to at least cover the cost of production;
  • For example: Any discussion of tourism will lead immediately to perceived over-commercialization for some people who do not adequately understand the benefits of a sustainable visitor management approach;

• Now that revenue retention is possible, the former top-down single source funding model of the Parks program will need to change to a bottom-up visitor model in order to gain the economic benefits associated from the revenue retention capability. This may threaten the role of some parks staff, especially those who are not directly connected with the visitor;

• To adequately manage optimal visitor experiences it is critical that front-line visitor service personnel receive sufficient training and compensation. Alberta Community Development should continue its proactive campaign to competitively price salaries and offer training opportunities in recognition of retaining quality employees;
• Enforcement is essential to protected area management or else the whole system degenerates, but the enforcement culture is a threat to the emerging culture that is responsive to visitor needs. This change toward a visitor-centric system is essential for revenue retention, however enforcement officers must still play a critical management role (i.e. if people are using a hiking only trail for biking, enforcement officers can raise this issue as an existing tourism gap – perhaps a biking trail is needed to fulfill a visitor need).

• The word tourism often connotes – over-commercialization, large numbers, resource degradation, introduction of outsiders, resource sharing and lack of control. Therefore, each threat must be dealt with both in terms of planning and communication. It might be best to call this Visitor Management, instead of tourism management.

• A communication strategy is critical for educating and informing people about tourism issues and how they impact parks and protected areas. Not implementing a well-designed communication strategy threatens the ability of the Parks agency to implement a more sophisticated visitor experience strategy. This occurs because of the tourism misperceptions related to park resource protection. The four major groups that must be sequentially considered are: 1) politicians (political support is essential); 2) park employees (i.e. the enforcement culture); 3) local and regional communities/groups; and 4) park visitors. Each group requires a different communication strategy.

5.1 Creating Success Stories through Short-term Gains

All of the tourism management observations when considered in totality may appear daunting or overwhelming. Although, the primary purpose of this report was to provide an inventory which evaluates the existing state of tourism management it should be stated that all suggestions for future developments cannot take place immediately. A comprehensive management strategy will need to be studied and produced with short, medium and long-term goals for each site and the overall system should a large scale initiative become feasible. In the meantime, it would be worthwhile to test out some key ideas in order to gain immediate results. Creating small success stories that support the tenets of sustainable visitor management, which include resource protection and positive visitor experiences, may provide an impetus for furthering tourism practices.
As stated in the introduction, the main driver for this project was the visitor projection research that showed significant visitor increases will occur within the next few decades. The underlying concern behind this finding is that future demand will exceed future supply. This exact concern currently applies to Dinosaur Provincial Park as it was often stated during the on-site visit that demand exceeds supply. In the private sector this is not deemed to be a problem and with the new revenue retention capabilities within APPA, Dinosaur Provincial Park could be an optimal test-site for demonstrating the benefits of sustainable visitor management. It is not possible for Paul F. J. Eagles Ltd. to accurately suggest meaningful short-term gains without having an in-depth understanding of the visitor needs or wants at Dinosaur Provincial Park, however, some general ideas that could be applied by informed site professionals include:

- Design a tour package for the conference market that is comparable to private sector options and price accordingly. Target the conference market in Calgary and Edmonton during the shoulder seasons;
- Expand the current bus tour schedule by offering more trips throughout the day;
- Create and charge for value-added programming options for visitors such as special Moonlight tours, Photography clinics or organize a Special Lecture Series. Note: such an effort will provide minimal economic benefit if target groups are not actively informed or approached.

The gains that can be made through such initiatives will be relatively small compared to system-wide changes (i.e. a campsite reservation system or corporate partnerships) however the income generated may help to fund either initiatives that improve visitor experiences or programs that better protect the resources. In order for these small initiatives to become success stories the income earned must be tied to two things: 1) the generation of positive new visitor experiences; and 2) the new revenue must be invested into operational park functions that could not have existed without additional funding.
6.0 Recommendations for Best Practices Study

Based on the tourism management observations and analysis that was conducted within the five flagship provincial parks, there are several recommendations that can be made to improve visitor experiences in Alberta while ensuring the ecological and cultural integrity of the resources. Each of the recommended Best Practices Study topic areas that are listed below should provide opportunities for detailed management examples that fully explain how to implement the issues identified during this project’s SWOT analysis. To do so, it is essential that the Best Practices work be conducted from a sustainable tourism perspective, which employs the principles of a visitor management approach (see Appendix A), in order to ensure that both the park resources and the visitor experiences are considered. In its essence, visitor management is an administrative action oriented toward maintaining the quality of park resources and visitor experiences. A word of caution should be clarified prior to engaging in a more sophisticated financial management approach to protected area management – revenue retention is rarely enough to sustain capital expenditures as it tends only to help fund operating expenditures. For capital projects public support and money will still be required.

The critical areas that need to be addressed during a Sustainable Tourism Best Practices Study for Alberta are:

1. Understanding the Visitor

   During each flagship site visit, there was little evidence of a concerted effort to manage the facilities and services according to what visitors expect and want. Research needs to be conducted that demonstrates methods for providing visitor satisfaction by clearly understanding visitor expectations. Site managers need to match each visitor profile (i.e. market segment) with a strategic pricing policy and service/program delivery mechanisms. All management decisions must stem from a thorough understanding of the visitors in addition to the park’s preservation goals.

2. Visitor Use Measurement and Reporting

   Monitoring visitor use numbers and reporting the findings is an essential component of any sustainable planning or management process. Without having a systematic method for discerning visitor numbers it is not possible to understand the impacts of tourism – whether positive or negative – within a protected area.
3. Tourism Infrastructure within a Protected Area and the Nearby Communities

Establishing an environment with superb tourism infrastructure is essential to providing an optimal visitor experience. Protected area managers cannot only think about the infrastructure that is provided within a park boundary, but must also consider what is available within nearby communities. The elements that make up quality tourism infrastructure include: transport, accommodation, food, information, and trips, tours and guiding.

4. Service Quality & Responsiveness

How will a park manager know when they are being successful at delivering a quality visitor experience? What instruments have been established to measure and/or reward employees for exceptional service quality? How does the park monitor and respond to visitor concerns or suggestions? All of these questions are vital for a visitor-centric management system and methods need to be devised, other than camper satisfaction surveys, which ensure high service standards.

5. Pricing Policy and Financial Management

Revenue retention capability in conjunction with a dual mandate administration requires a sophisticated understanding of pricing policy and financial management. A greater understanding of this topic needs to be researched in terms of applicability and importance to parks and protected areas. Methods for capturing financial benefit from park visitors while maintaining positive visitor experiences and resource protection should be demonstrated.

6. Volunteer and Community Development

Visitor and community development is an often overlooked, yet important, topic that needs to be addressed because the affects of tourism not only implicate park managers and visitors but also its volunteers and nearby communities. The primary questions that need to be answered are: 1) What is the state of tourism relationships between the local/regional tourism operators and the park; and 2) How involved is the community in the delivery and management of park activities?

7. Communication Strategy

How does the park communicate with the world? This is a critically important aspect of visitor management and all flagship sites can improve several aspects of the visitor experience process by simply sharing, organizing and managing information better. This topic area includes items such as web development, pre-registration, and information collection and dissemination.
8. Regional Tourism Integration Planning

The Alberta Provincial Park system could benefit tremendously from a series of regional tourism integration plans that could tie various parks together for different visitor purposes. What would an effective integration plan look like? Who would be involved? How would it be managed? These are difficult questions that could be answered through examples that have been implemented in other industries or elsewhere in the world.

9. Risk Management

All outdoor activities involve some level of risk. However, few tourism organizations manage or plan for risk effectively. If visitor risk is the systematic identification, analysis, and control of the broad range of visitor risks that could threaten a park and its objectives, what methods should be in place to mitigate any potential risk?

10. Personnel Management

When visitors are an important component of park management, employees and volunteers need to be recognized as an important factor in ensuring the successful management of sustainable tourism. As visitor numbers continue to increase, parks must develop higher levels of tourism management competence in their staff complement. The key areas include: 1) Understanding visitors’ needs and wants; 2) Service quality management; 3) Leisure pricing policy; 4) Leisure marketing; 5) Tourism and resource economics; 6) Finance; and 7) Tourism management.

6.1 Protected Area Tourism Management Frameworks

To ensure that both the preservation and visitor enjoyment goals within APPA are achieved each of the ten recommended topic areas should be considered with a visitor management framework in mind. Visitor management frameworks are designed to help protected area planners determine what degree of human impact is acceptable for a particular park. Such decisions, while informed by science, often represent value judgements, and in some cases trade-offs. The key visitor management question that relates directly to the three goals of sustainable tourism in protected areas (i.e. enhancing economic opportunities, protecting natural and cultural heritage, and enhancing quality of life) is: What impact to the parks’ resources is worth the positive economic and quality of life gains from park tourism? Choosing a visitor management framework when thinking
about various management issues will help planners and managers determine acceptable tourism activities and levels that enable resource sustainability.

Although there are several different visitor management frameworks currently being used internationally (i.e. Visitor Impact Management – VIM, Visitor Experience and Resource Protection – VERP, Visitor Activity Management Process – VAMP, Recreation Opportunity Spectrum – ROS, and Tourism Optimization Management Model – TOMM), the Limits of Acceptable Change framework is highlighted in this report as a recommended tool for accomplishing Alberta’s preservation and visitor enjoyment goals. Limits of Acceptable Change (LAC) is a process for defining what biophysical and social conditions are acceptable or desirable at what locations in protected areas, and then determining the management actions and approaches most appropriate for enhancing, maintaining or restoring those conditions. Biophysical conditions refer to the amount of change from natural conditions caused by park tourism and associated developments. Social conditions refer to the number, frequency and type of individuals a visitor may encounter during a typical visit. Determining the appropriateness of these conditions and how to manage for them is best accomplished through a process that is systematic, explicit, defensible and rational, coupled with extensive public participation.

The key elements in the LAC process are: 1) identify the acceptability of biophysical and social impacts; 2) develop management techniques to ensure that the standard of acceptability is not breached; 3) monitor resulting conditions; and 4) change management techniques if needed. Since acceptability is determined by cultural norms, this means the process to identify standards must be both explicit and open to participation by park stakeholders. Simply defined, LAC is a process for determining what resource or social conditions are acceptable, and then prescribing a set of management actions to achieve those conditions (this concept is supported by sustainable tourism management practices). For more information about the LAC process and its associated nine steps, refer to Eagles and McCool (2002).

---

6.2 Existing Best Practice Sustainable Tourism Sites

The following six sites provide excellent examples of sustainable tourism management. In order to learn a diversity of practicable lessons on how to balance preservation and visitor management goals it is necessary to not only seek park tourism management examples within North America, but also elsewhere. The selected sites are all internationally recognized for their ability to manage quality visitor experiences, gain economic benefit, improve the quality of life within the community, and preserve the significant natural, cultural and/or historic features that exist under each administration.

1. Montegue Island Nature Reserve, New South Wales, Australia

This unique Nature Reserve is home to hundreds of seals from the end of winter to early December. It's also a significant breeding ground for 15 bird species, including about 8000 pairs of penguins. To visit this sensitive natural environment, visitors must book and reserve an interpretive tour. Throughout the past decade the New South Wales, National Parks and Wildlife Service, has turned Montague Island from a place no one was allowed to visit to one which has since received international praise for its sensitive approach to managing the balance between the environment and tourism. Montague Island Nature Reserve provides an excellent example of strategic business planning and its professional approach to the development of sustainable interpretive tours, all of which inject about $1.4 million a year into the local economy.

2. Whale Watch Kaikoura, South Island, New Zealand

Based in Kaikoura, South Island, this small fishing (and former whaling) community had a high level of unemployment. A group of local Maori people now own and operate a fleet of whale watching vessels offering employment to many local residents. Their offices make use of a refurbished railway station and part of the profit goes directly to the education and training of adults and young people. The traditional meeting place of the Maoris is also being used for visitor educational purposes including the enhancement of knowledge relating to the cultural history of the region. APPA can learn through this sustainable tourism organization how to better involve Aboriginal communities and culture into the management and operation of parks, such as Writing-On-Stone Provincial Park, and how to harness the notion of community development. In addition, it demonstrates that the long-term value of wildlife, as a tourist attraction, outweighs their value through hunting.

3. Kruger National Park, South Africa

Kruger National Park is best known for the “Big Five” - Lion, Elephant, Leopard, Buffalo and Rhino - and is truly the flagship of Africa and South Africa's game reserves. This park is an excellent example of effective revenue generation as it offers
a wide range of methods for raising income while ensuring the preservation of the
parks resources. In particular, it provides a wide range of accommodation (nine
different levels) and interpretive safaris to suit all visitor preferences and budgets.
This excellent example of market segmentation does not only demonstrate the
economic benefit enjoyed by the park but also illustrates the benefits to nearby
communities who enjoy a tremendous economic multiplier effect.

4. **Niagara Parks Commission, Ontario, Canada**

The Niagara Parks Commission is a self-financed agency of the Ontario Ministry of
Tourism. The goal of this park agency is to preserve and enhance the natural beauty
of the Falls and the Niagara River corridor for the enjoyment of visitors while
maintaining financial independence. Without charging for the primary visitor
experience, which is falls viewing, the Niagara Parks Commission has developed a
fiscally responsible business plan that consistently produces an annual surplus.
APPA can benefit from the Niagara Parks Commission experience by learning a
variety of revenue retention techniques that ensure and support a preservation and
visitor use mandate.

5. **Algonquin Provincial Park, Ontario, Canada**

Algonquin Park is Canada’s oldest provincial protected area and is one of Ontario’s
busiest natural environment parks. This park superbly illustrates the benefits of
encouraging and managing a highly involved Friends Group organization. The
degree of positive cooperation between park management and the Friends Group
surpasses most other Canadian examples. The result of this productive relationship is
manifest in the richness of the park’s interpretive program and the economic benefits
that derive from Friends Group initiatives. Algonquin Provincial Park is also an
example of park management under the auspices of Ontario Parks; an organization
that has fully adopted a visitor management approach to resource protection and
visitor enjoyment.


This National Park encompasses 800 square miles, of which 95 percent are forested.
It is a World Heritage Site and International Biosphere Reserve renowned for the
diversity of its plant and animal resources, the beauty of its ancient mountains, the
quality of its remnants of Southern Appalachian mountain culture, and the depth and
integrity of the wilderness sanctuary within its boundaries. This protected area is an
excellent example of how to effectively manage huge numbers of visitors (10 million
annually) while maintaining a conservation mandate.
## Appendix A: Principles of Visitor Management

<table>
<thead>
<tr>
<th>Principle</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1. Appropriate management depends on objectives | - Objectives provide definitive statements of protected area management.  
- They identify the appropriateness of management actions and indicate acceptable resource and social conditions.  
- They allow evaluation of success of management actions.  
- The specific objectives are likely to be more contentious than general value statements.  
- The process of establishing objectives is essentially political; therefore, public participation is essential. |
| 2. Diversity in resource and social conditions in protected areas is inevitable and may be desirable | - Impacts, use levels, and expectations of appropriate conditions tend to vary (e.g. impact of a campsite in periphery vs. centre of the protected area).  
- Environmental variables influence visitor use and level of impact (e.g. topography, vegetation, access).  
- Managers can identify this diversity, then make decisions on its desirability, thereby separating technical decisions from judgmental ones.  
- Using zoning explicitly to manage for diverse recreation opportunities is more likely to preserve important values. |
| 3. Management is directed at influencing human-induced change | - Protected areas often protect natural processes as well as features, so management is generally oriented to managing human-induced change since it causes most disturbances.  
- Human-induced change may lead to conditions considered to be undesirable.  
- Some changes are desirable and may be the reason for the creation of the park. For example, many parks are created to provide recreation opportunities and local economic development.  
- Management actions determine what actions are most effective in influencing amount, type and location of changes. |
| 4. Impacts on resource and social conditions are inevitable consequences of human use | - Even small amounts of recreational use can lead to disproportionately large biophysical or social impacts, so any level of use leads to some impact.  
- Many impacts are purposefully designed, for example providing a certain level of environmental education for park visitors.  
- Managers must ask: “How much impact is acceptable or desirable?”  
- The process to determine the acceptability of impact is central to all visitor planning and management.  
- Managers must utilize appropriate actions to create and manage this acceptable level of impact. |
| 5. Impacts may be temporally or spatially discontinuous | - Impacts from visitor use or management activities may occur out of the protected area, or not be visible until later (e.g. prohibitions of use may displace that use to other areas).  
- Planners need substantial knowledge of relationships between use and impacts to predict relationships at a variety of scales and over time. |
### 6. Many variables influence the use/impact relationship

- Many variables other than level of use affect the use/impact relationship in protected areas (e.g. behaviour of visitors, travel method, group size, season and biophysical conditions).
- Education and information programs, as well as regulations aimed at restricting visitor behaviour, may be necessary in addition to limits of use.

### 7. Many management problems are not dependent on numbers of users

- Management issues relating to the density of human use often have relatively simple technological solutions (e.g. parking, toilet facilities, water supply). But the relationship to use is not always linear. For example, the facilities designed for a few users may have very large impacts, but facilities designed for many more users have proportionally less additional impact.
- Similarly, social conditions (e.g. visitor satisfaction) are not always density-dependent.

### 8. Limiting use is only one of many management options

- A use-limit policy is only one of a number of potential management actions available, and is one of the most intrusive actions that protected area managers can employ.
- There are many issues involved in employing limits to use, such as choosing appropriate allocation or rationing techniques.
- Limiting use can have major political problems because of the necessary decision of who does not get access, and how access is allocated.

### 9. The decision-making process should separate technical decisions from value judgements

- Many protected area management decisions are technical (e.g. location of trail, design of visitor centre). But others reflect value judgements (e.g. decisions to limit use, and how, types of facilities, tourism opportunities provided).
- Decision processes should separate questions of “existing conditions” from “preferred conditions”.

### Appendix B: Tourism Analysis for Protected Areas Chart (TAPAC)

The primary purpose of the TAPAC is to ensure that all the potential tourism management factors are initially analysed during a site investigation. The elements of the 10 tourism management factors involve a series of essential questions. There are measurement scales for several of the questions in order to statistically capture and compare the performance between sites. Subjective comments that relate to the context and experience should be shared at the conclusion of each factor analysis. The TAPAC was used to guide data collection at each of the site visits.

Protected Area: ______________________ Manager/ Contact: ______________________

<table>
<thead>
<tr>
<th>Section 1: Visitor Use Measurement and Profile Recognition</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the total visitor use statistics for each of the last 10 years?</td>
</tr>
<tr>
<td>What visitor statistics are collected? (i.e. # of visitors, etc.)</td>
</tr>
<tr>
<td>What market segmentations are identified (name &amp; how many)?</td>
</tr>
<tr>
<td>How are the visitors segmented? Circle: by socio-demographics by geography by perceived benefits by activity type by frequency of participation by psychographics</td>
</tr>
<tr>
<td>Is there fee differentiation for user groups? List those rates that apply (i.e. group, senior, family, children, student…):</td>
</tr>
<tr>
<td>What tourism trend characteristics are considered? Circle: aging population rising education information technology importance of quality life stage differences family composition ↑ social/environ. concerns ↑ travel options</td>
</tr>
<tr>
<td>What is the total park income gained from park tourism?</td>
</tr>
<tr>
<td>What is the percentage level of cost recovery in this park?</td>
</tr>
<tr>
<td>Overall impression</td>
</tr>
</tbody>
</table>

Protected Area: ______________________ Manager/ Contact: ______________________
### Section 2: Tourism Infrastructure in the Park

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What programs/activities are available in the park?</td>
<td></td>
</tr>
<tr>
<td>Do the programs/activities consider different tourism markets? If yes, identify them.</td>
<td></td>
</tr>
<tr>
<td>How are the programs/activities priced?</td>
<td></td>
</tr>
<tr>
<td>What programs are offered by the park employees?</td>
<td></td>
</tr>
<tr>
<td>What programs are offered by licensees or concessionaires?</td>
<td></td>
</tr>
<tr>
<td>What facilities/services are available in the park?</td>
<td></td>
</tr>
<tr>
<td>Do the facilities/services consider different tourism markets? If yes, identify them,</td>
<td></td>
</tr>
<tr>
<td>Who provides the facilities/services?</td>
<td></td>
</tr>
<tr>
<td>How are the facilities/services priced?</td>
<td></td>
</tr>
<tr>
<td>Overall impression</td>
<td></td>
</tr>
</tbody>
</table>

### Section 3: Tourism Infrastructure in the Nearby Communities

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the programs/activities available in the nearby community?</td>
<td></td>
</tr>
<tr>
<td>Who offers these programs?</td>
<td></td>
</tr>
<tr>
<td>Do the programs/activities consider different tourism markets? If yes, identify them,</td>
<td></td>
</tr>
<tr>
<td>How are the programs/activities priced?</td>
<td></td>
</tr>
<tr>
<td>What facilities/services are available in the nearby community?</td>
<td></td>
</tr>
</tbody>
</table>
### Section 3: Who provides the facilities/services?

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do the facilities/services consider different tourism markets? If yes, identify them.</td>
<td></td>
</tr>
<tr>
<td>How are the facilities/services priced?</td>
<td></td>
</tr>
</tbody>
</table>

**Overall impression**

### Section 4: Service Quality & Responsiveness within the Park.

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How are complaints/comments recorded and handled?</td>
<td></td>
</tr>
<tr>
<td>Is there a service quality goal?</td>
<td></td>
</tr>
<tr>
<td>Are there service quality statistics?</td>
<td></td>
</tr>
<tr>
<td>How are complaints/visitor policies shared with the employees of the agency and concessionaires?</td>
<td></td>
</tr>
<tr>
<td>How are employees encouraged to achieve a certain service quality standard?</td>
<td></td>
</tr>
<tr>
<td>Does the site maintain contact with visitor following their visit?</td>
<td></td>
</tr>
</tbody>
</table>

**Overall impression**

### Section 5: Community Involvement & Tourism Relationships

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the park host/participate in local community events?</td>
<td></td>
</tr>
<tr>
<td>Does the park advertise local services?</td>
<td></td>
</tr>
<tr>
<td>What communities are consulted in the decision-making process?</td>
<td>local ☐ visiting ☐ vicarious ☐</td>
</tr>
<tr>
<td>How can individuals and communities get involved in park activities?</td>
<td>Circle: Friends Group Service provision provide targeted donations provide personal assistance</td>
</tr>
</tbody>
</table>

**Overall impression**

*How is the community/park tourism relationship characterized?*
### Section 6: Communication Strategy

*When appropriate indicate which stakeholders are targeted.*

<table>
<thead>
<tr>
<th>Question</th>
<th>Visitors</th>
<th>Res. Oper.</th>
<th>Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is there a written or verbal communication strategy?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is there a park website? Is it effective?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Who is the park attracting?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does the site cross-market with other organizations and/or parks?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are all aspects of the strategy cost effective?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How does the park communicate local, prov. &amp; national values?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Overall impression**

### Section 7: Research & Development

<table>
<thead>
<tr>
<th>Question</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the site measure and monitor tourism related indices?</td>
<td>e.g. visitor statistics, local developments, tourism trends...</td>
</tr>
<tr>
<td>What park tourism research is conducted within the park?</td>
<td></td>
</tr>
<tr>
<td>How is the research communicated?</td>
<td></td>
</tr>
<tr>
<td>Is there an effort to shared R &amp; D within and between park &amp; community?</td>
<td></td>
</tr>
</tbody>
</table>

**Overall impression**
## Section 8: Risk Management

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What visitor personal safety/security plans are in place?</td>
<td></td>
</tr>
<tr>
<td>How has the park prepared for financial/economic risk?</td>
<td></td>
</tr>
<tr>
<td>What socio/cultural risks have been identified and managed for risk?</td>
<td></td>
</tr>
<tr>
<td>Has the site prepared for environmental risk?</td>
<td></td>
</tr>
<tr>
<td>Overall impression</td>
<td></td>
</tr>
</tbody>
</table>

## Section 9: Policy & Practice: What drives what?

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is there a tourism plan within the management plan? Or is there a separate park tourism plan?</td>
<td></td>
</tr>
<tr>
<td>Does the site operation consider all elements of the park tourism policy (economic, natural/cultural heritage &amp; quality of life)?</td>
<td></td>
</tr>
<tr>
<td>Are there policies that aren’t practiced? (explain)</td>
<td></td>
</tr>
<tr>
<td>Are there practices that aren’t policy? (explain)</td>
<td></td>
</tr>
<tr>
<td>Are the policies and practices compatible?</td>
<td></td>
</tr>
<tr>
<td>Overall impression</td>
<td></td>
</tr>
</tbody>
</table>

## Section 10: Human Resources: Capacity and Capabilities

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many agency employees are in the park?</td>
<td></td>
</tr>
<tr>
<td>How many agency employees provide direct services to the park visitors?</td>
<td></td>
</tr>
<tr>
<td>How many concessionaire employees are in the park?</td>
<td></td>
</tr>
</tbody>
</table>
### CON’T…Section 10

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many concessionaire employees provide direct services to the park visitors?</td>
<td></td>
</tr>
<tr>
<td>What tourism training is provided to the employees?</td>
<td></td>
</tr>
<tr>
<td>What employee selection criterion promotes tourism (i.e. job descriptions, interview questions, employee experience, educ. etc?)</td>
<td></td>
</tr>
<tr>
<td>Does the remuneration attract quality personnel for key tourism-related positions?</td>
<td></td>
</tr>
<tr>
<td>Are there opportunities for career development?</td>
<td></td>
</tr>
</tbody>
</table>

### Overall Conclusions

<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>How important is park visitation and tourism to decision making in this park?</td>
<td>Scale of 1 to 10.</td>
</tr>
<tr>
<td>What is the overall level of integration between park tourism activities and local community tourism activities?</td>
<td>Scale of 1 to 10</td>
</tr>
<tr>
<td>What is the current market profile for this park?</td>
<td>Local Regional Provincial National International Explain why?</td>
</tr>
<tr>
<td>What is the potential to increase the market profile for this park?</td>
<td></td>
</tr>
<tr>
<td>Are the current programs, services and facilities adequate for the existing demand?</td>
<td></td>
</tr>
<tr>
<td>What are the major needs in regards to programs?</td>
<td></td>
</tr>
<tr>
<td>What are the major needs in regards to services?</td>
<td></td>
</tr>
<tr>
<td>What are the major needs in regards to facilities?</td>
<td></td>
</tr>
</tbody>
</table>