

Alberta's Crown Land Outdoor Recreation Economy

Driving Sustainable Economic Growth,
Diversification & Job Creation

August 2021

Territorial Acknowledgement

TIAA acknowledges that Alberta's crown land outdoor recreation takes place on traditional territory with respect of Treaties 6, 7, 8, 4 and 10. We further acknowledge the homelands of the Métis, the eight Métis Settlements, the six Métis Regions of the Métis Nation, and the diverse histories and cultures of all the Indigenous Peoples of these traditional territories. We are grateful to walk alongside our Indigenous brothers and sisters to respect, nurture, recreate on, and appreciate the land and waterways that make up what we now know of as Alberta.

Albertans are passionate and active outdoor recreation enthusiasts! With the prairies in the south and the east, the foothills and the mountains in the west, and the boreal forest in the north, Alberta is blessed with a rich natural heritage and an abundant diversity of outdoor recreation opportunities. Representing more

than **40 million hectares** of the province, access to healthy crown lands is the backbone of Alberta's booming outdoor recreation economy.

Outdoor recreation is a resource-based economy and, like all resource-reliant economies, understanding the supply and distribution of outdoor recreation resources is the first step in supporting a strong outdoor recreation economy.

This study was commissioned by the Tourism Industry Association of Alberta (TIAA) and informed through the contributions and guidance of nineteen (19) outdoor recreation user groups. Its intention was to quantify and report on outdoor recreation activity participation rates in Alberta, while capturing the geographic and economic distribution of these impacts, following accepted models and methods.

Notable is that Albertans spend **\$2.3 billion** on crown land outdoor recreation trips annually and another **\$376 million** on recreation equipment and related accessories for these trips. On average, Albertan outdoor enthusiasts spend **\$258 per day trip** and **\$757 per overnight trip**.

Although spending related to recreational trips to crown lands only accounts for 0.8 per cent of Alberta's GDP, the employment resulting from this spending is 6.1 times greater than the employment in the forest and logging industry. In addition, it equates to 63 per cent of the number of jobs in the agricultural industry.

Outdoor recreation is entering a new era with the private sector and governments on a global scale recognizing the immense social importance and impressive economic contributions of the outdoor recreation economy. In many countries, deliberate actions have been undertaken to invest in and grow the outdoor recreation economy.

To support Alberta's ability to unlock the potential of its outdoor recreation economy and, in the process, stem the growing leakage of visitation and recreational investment from Alberta to neighbouring provinces, this study proposes six specific action steps to grow Alberta's outdoor recreation economy.

Crown Land Outdoor Recreation

Crown land

Crown lands are one of the defining features of Alberta. These lands, owned by Albertans and stewarded by the provincial government on our behalf, have shaped the province's economy as a cherished part of Alberta's identity and Albertans' way of life. Comprising approximately 40 million hectares, or 60 per cent of the province, crown lands include public lands managed under the Public Lands Act, and provincial parks and protected areas managed under the Provincial Parks Act, Willmore Wilderness Park Act or Wilderness Areas, Ecological Reserves, Natural Areas and Heritage Rangelands Act.

Provincial parks and protected areas

Alberta's provincial parks and protected areas system boasts 472 sites representing approximately 6.6 per cent of the province. This includes lands designated as Wilderness Areas, Ecological Reserves, Heritage Rangelands, Willmore Wilderness Park, Wildland Provincial Parks, Natural Areas, Provincial Parks, and Provincial Recreation Areas under provincial legislation.

Public lands

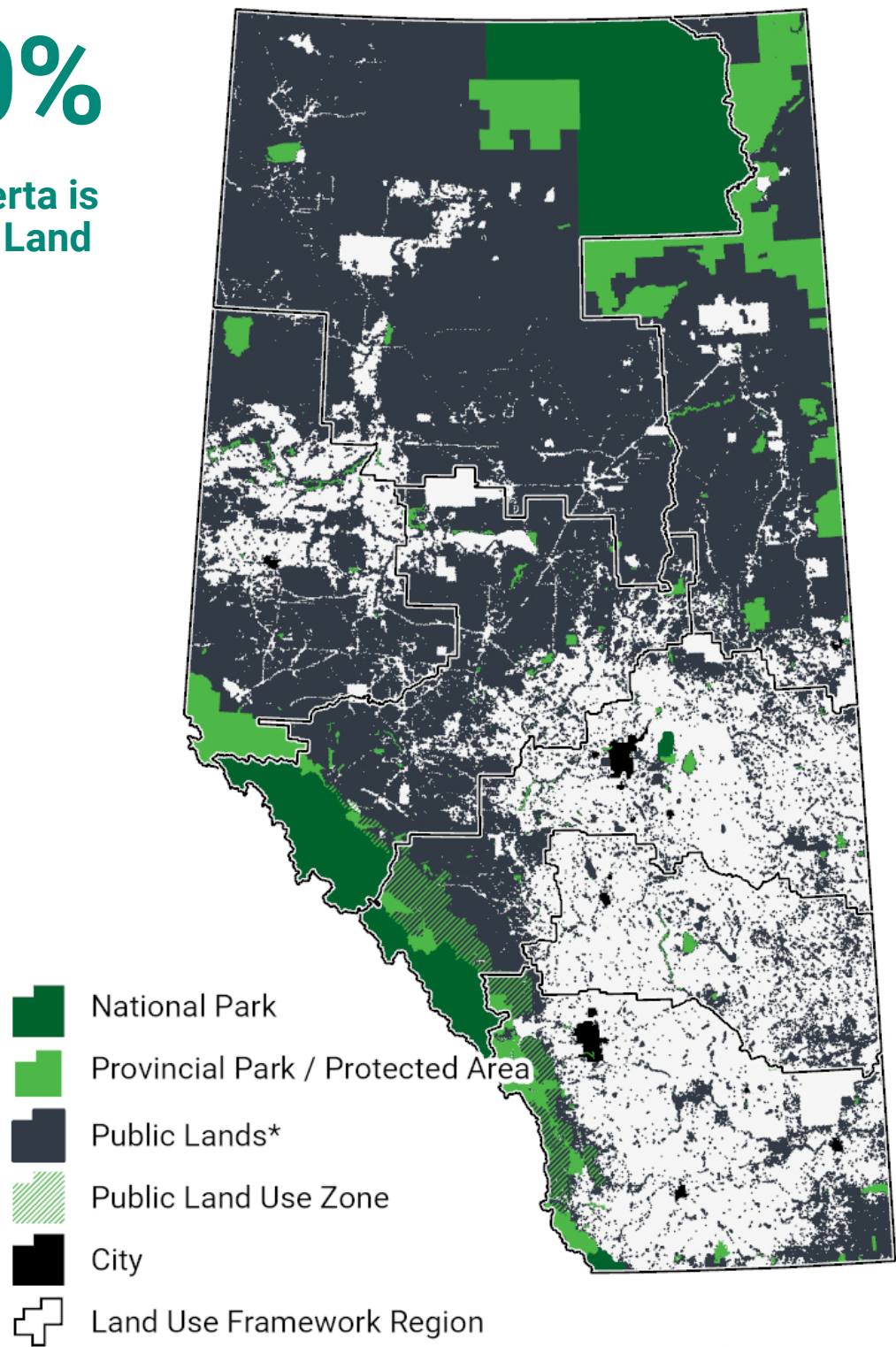
Public lands cover approximately 50.5 per cent of Alberta. Managed in accordance with the Public Lands Act, these lands support conservation, outdoor recreation, continued exercise of Treaty rights and resource-based industries, including tourism. To enable the better management of outdoor recreation, some public lands have been designated as Public Land Use Zones (PLUZ), Public Land Recreation Areas (PLRAs), and Public Land Recreation Trails (PLRTs).

For context and comparison purposes, national parks, which are managed by the federal government, have been included in this study to help understand the relative importance of provincial crown lands to Alberta's outdoor recreation economy.



60%

of Alberta is Crown Land



*Public Lands shown are approximate



Outdoor recreation

Crown land outdoor recreation is comprised of all day use and overnight outdoor recreation activities that occur on crown lands, including, but not necessarily limited to:

- Non-motorized and motorized recreation activities
- Land and water-based activities
- Consumptive (fishing, hunting) and non-consumptive activities
- Summer and winter activities.

These activity categories make up Alberta’s Outdoor Recreation Economy



Camping

- Frontcountry campground
- Backcountry campground
- Random



Trail activities

- Hiking / running / walking
- Backpacking
- Equestrian



Cycling

- Road biking
- Mountain / fat biking
- BMX / dirt jumping



Motorized activities

- ATV / side by aide
- Off road motorcycle
- 4x4
- Snowmobiling



Mountain activities

- Rock climbing / bouldering
- Mountaineering
- Scrambling
- Ice Climbing



Water activities

- Swimming (lakes & rivers)
- Flat water paddling (canoe, kayak, SUP, sailing)
- River based paddling (canoe, kayak, rafting, SUP)
- Power boating (jet, prop)



Hunting

- Shotgun / rifle
- Bow



Fishing

- Fly & spin
- Ice fishing



Snow activities

- Cross-country skiing
- Snowshoeing
- Downhill skiing / snowboarding
- Alpine ski-touring / split boarding



Wildlife viewing



Photography

Outdoor recreation opportunity

An outdoor recreation opportunity is the ability for an individual to take part in their desired activity, in a desired recreation setting, in a desired natural region.

[Activity + Setting] x Natural Region
= Recreation Opportunity

BENEFITS



Community



Economic



Health +
Wellness

Shifting focus

Alberta’s crown lands have long been recognized for the economic contribution they make through industries such as oil and gas, mining, grazing and forestry. The role these lands play in the context of growing a robust outdoor recreation economy have not been as widely recognized nor as deliberately pursued. As reaffirmed in **Alberta’s 2020 Crown Land Vision**, land used for outdoor recreation is viewed as a land use that simply needs to be managed to minimize impacts and conflicts with environmental values and land uses. Such a management philosophy has created a reactive approach to crown land outdoor recreation and an underrealized outdoor recreation economy. While other industries on crown land have articulated the contribution they make to Alberta’s economy, and the government works to establish the conditions for those industries to succeed, Alberta’s outdoor recreation economy has not received the same support. As a result, outdoor recreation on crown lands is not recognized or understood to be a major economic sector that holds significant potential to grow and diversify Alberta’s economy.

“There are gaps in how government manages recreation, ensures sustainability and safety, and maintains the natural environment of the places Albertans and visitors so enjoy. Land managers are facing challenges because of increasing demands for recreation and trails on public land.”

– Crown Land Vision

It’s unequivocal, Alberta’s crown lands and waters fuel the very activities that are at the heart of this booming industry and a shift in management focus is needed to secure the future potential of Alberta’s outdoor recreation economy.

©Plaid Goat Mountain Bike Fest / Ryan Creary

Outdoor Recreation is a Resource Based Economy

No matter what the activity, Alberta's crown lands host the essential outdoor recreation resources that enable Alberta's outdoor recreation economy to thrive.

Just like other resource-based industries on crown lands, outdoor recreation relies on maintaining the integrity of and ensuring dependable access to both natural and built outdoor recreation resources (i.e. lakes, rivers, waterfalls, snow, glaciers, mountains, fish, wildlife, ecosystems, trails, campsites, staging areas, climbing areas, caves, scenery and recreation settings). Without access to and the wise management of these resources, the industry will not exist and certainly cannot grow.

Outdoor recreation....

Yes, it's what Albertans do for fun. But it's so much more! Outdoor recreation is an opportunity to grow and diversify the economy, make the province a more appealing place to live and invest, while improving the health and well being of every Albertan.

472 provincial parks & protected areas



1,864 named lakes

19 Public Land Use Zones (PLUZs)



250 campgrounds & 14,000 frontcountry campsites in provincial parks & protected areas

5 national parks

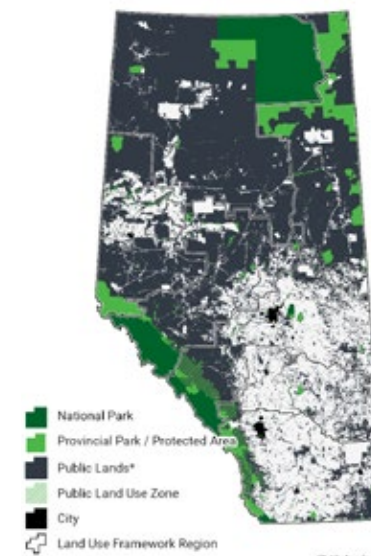


1,000's of kilometers of designated trails

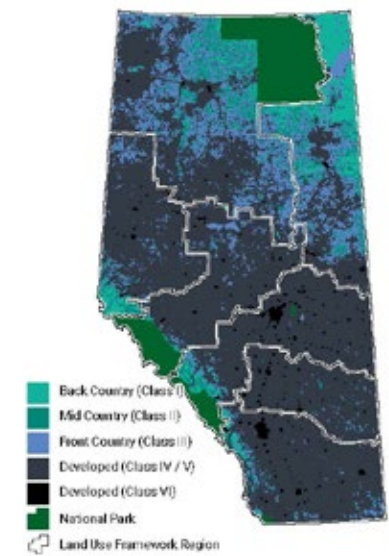
Alberta's outdoor recreation resources

Like all resource based economies, understanding the supply and distribution of outdoor recreational resources is the first step in supporting this distinctive economy. Though these are in need of updating, the Government of Alberta has led initiatives previously to map outdoor recreation features, recreation settings, scenic values on crown lands, in addition to mapping the province's natural regions. Collectively, and when up to date, these datasets can enable sound planning, policy development and decision making in support of the outdoor recreation economy. In their absence, our outdoor recreation resources cannot be meaningfully considered, championed or properly planned.

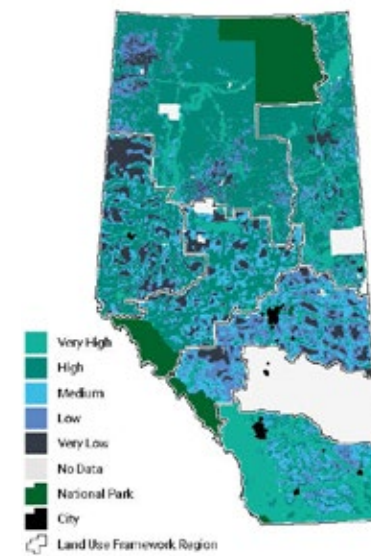
Crown lands



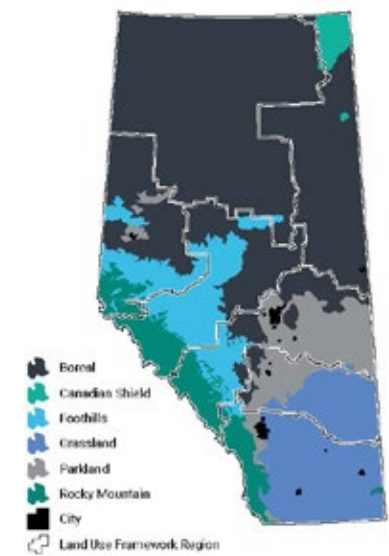
Recreation settings



Scenic resources



Natural regions



Albertans are Passionate and Active Outdoor Enthusiasts

Albertans are estimated to have taken over 13.4 million outdoor recreation trips to crown lands (2019/20). More than ten million (78.4 per cent) of these trips were day trips and 2.9 million (21.6 per cent) were overnight trips.

Each year...

33.0%
of all outdoor recreation trips by Albertans
occur on public lands

36.3%
occur in provincial parks and protected areas

30.7%
occur in national parks

Public lands, which have historically received little proactive outdoor recreation planning, management or infrastructure investments, host 33 per cent of outdoor recreation trips annually.

Of Albertans surveyed...

92.4%
visited public lands

83.2%
visited provincial parks &
protected areas

74.8%
visited a national park

Crown lands throughout the province support Albertans' outdoor pursuits – but not equally. Of all crown land outdoor recreation trips:

61.1% occur in the South Saskatchewan

23.0% occur in the North Saskatchewan

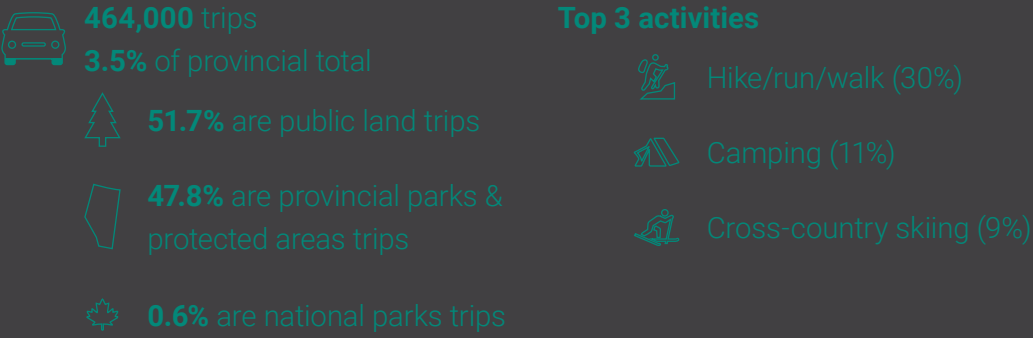
9.2% occur in the Upper & Lower Athabasca

3.5% occur in the Upper & Lower Peace

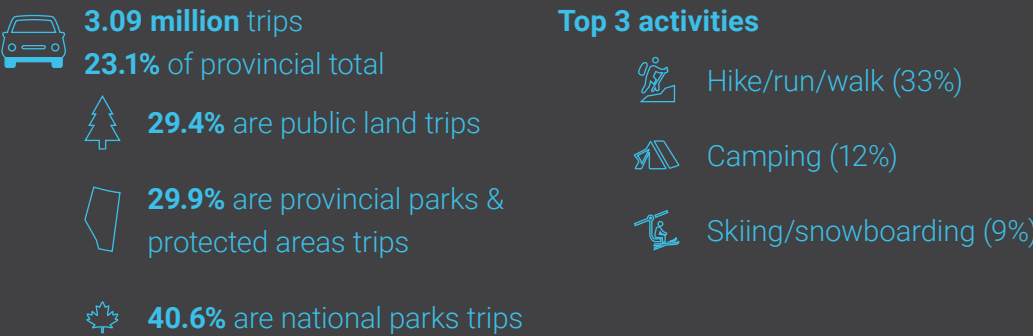
3.1% occur in the Red Deer

Outdoor recreation participation by region

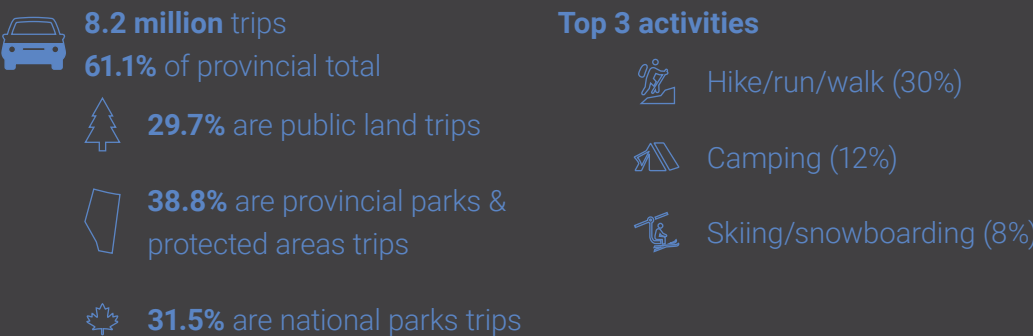
Upper & Lower Peace



North Saskatchewan



South Saskatchewan



Upper & Lower Athabasca



Red Deer

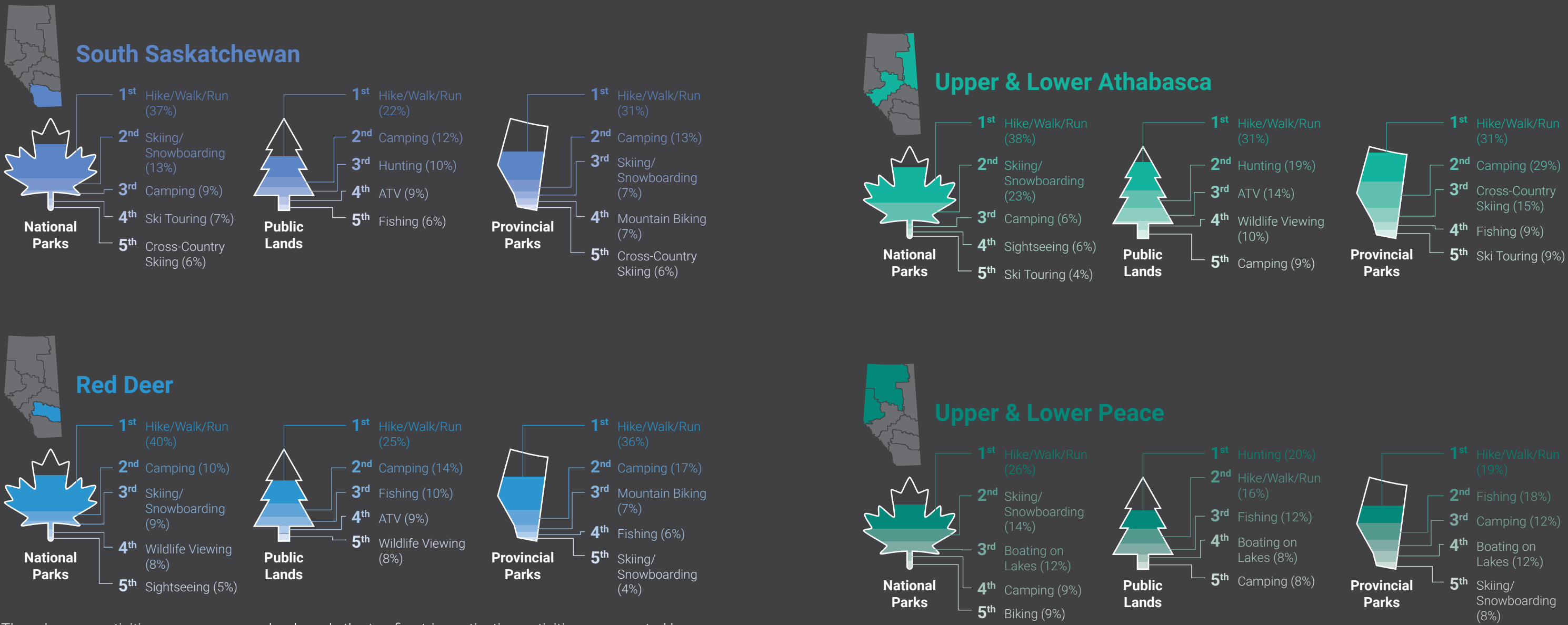


*Due to sample sizes some regions were merged for analysis.

Outdoor recreation trip motivating activities by region & crown land type

Crown lands enable and support a wide diversity of outdoor recreational activities. However, in keeping with the distribution of crown land outdoor recreation resources, as well as existing regulations, activity participation varies by region and by crown land type.

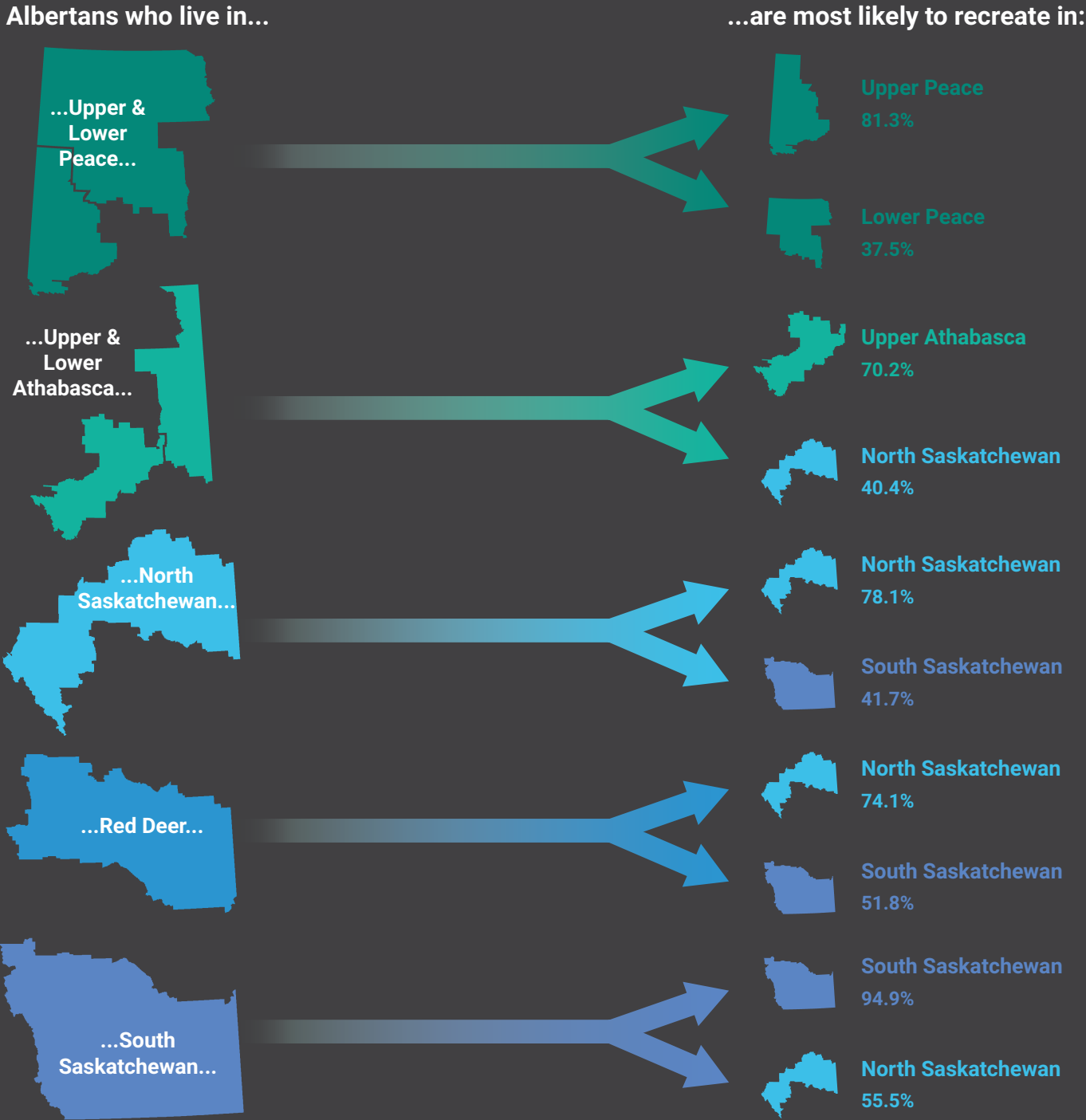
Top 5 activities motivating trips to crown land



Though many activities occur on crown lands, only the top five trip motivating activities are reported here. See the Appendix for further details on crown land trips that are motivated by each activity type.

While Albertans are highly likely to recreate on crown lands in their home region, they also regularly travel away from where they live to other regions to enjoy the outdoors. The figure below shows which regions Albertans who live in the shown region are most likely to recreate in. Regions shown on the right illustrate the two regions that survey respondents from each respective home region were most likely to participate in, as well as the proportion of survey respondents who were likely to recreate in those regions.

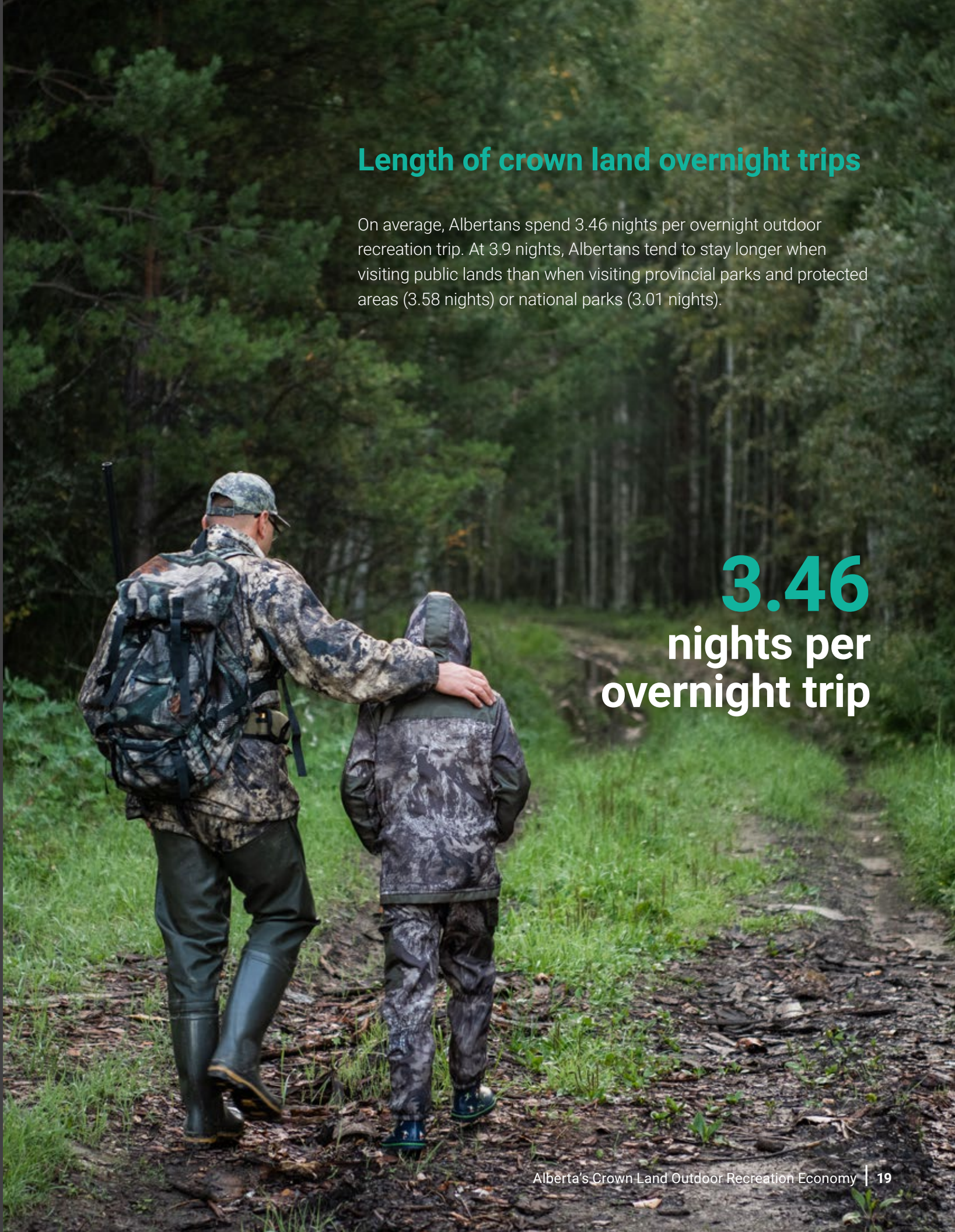
Top 2 regions residents are most likely to recreate in



Length of crown land overnight trips

On average, Albertans spend 3.46 nights per overnight outdoor recreation trip. At 3.9 nights, Albertans tend to stay longer when visiting public lands than when visiting provincial parks and protected areas (3.58 nights) or national parks (3.01 nights).

3.46
nights per
overnight trip



Outdoor Recreation is a Powerful Economic Driver with Untapped Potential



Alberta's outdoor enthusiasts are big spenders when it comes to outdoor recreation. Each year, these consumers generate:

\$2.3 billion
in trip-related expenditures
(fuel, food & beverage,
rentals, fees,
accommodation, etc.)

&

\$376 million
in equipment and
accessory expenditures
(gear, equipment, apparel,
vehicle purchases, etc.)

Trip related expenditures

On average, Alberta’s outdoor enthusiasts spend:

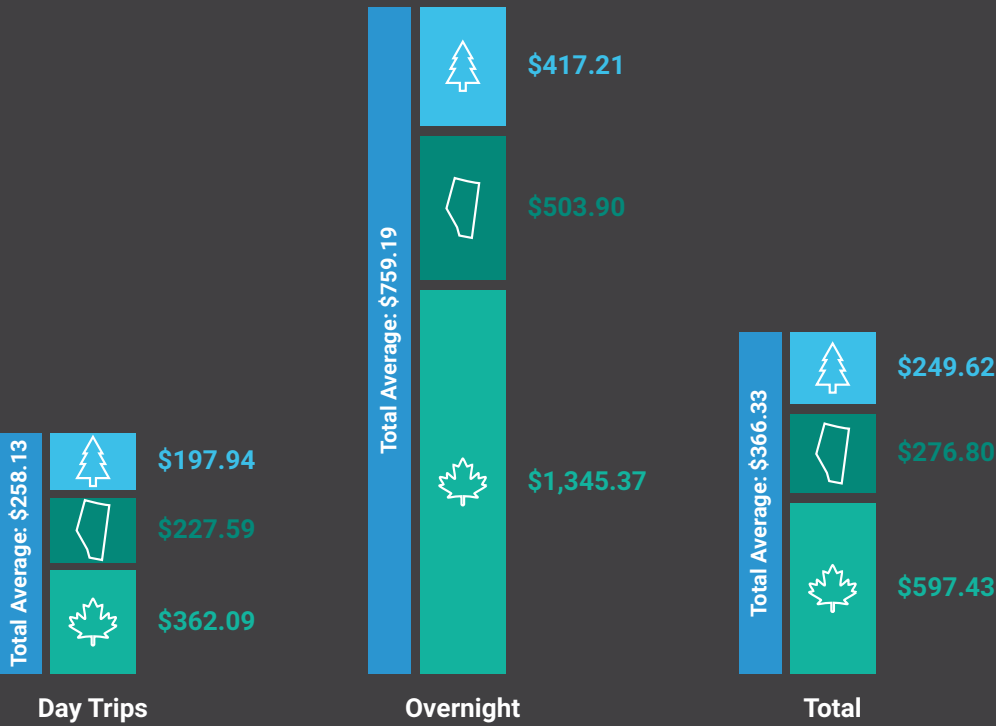
\$258
per day trip

\$757
per overnight trip

Spending varies significantly by crown land type as well as by stage of trip (Figure 1 and Figure 2). Approximately 1/3 of spending occurs at each stage of the trip lifecycle – at home, en-route and in destination. However, the proportion of spending made in-destination is significantly higher for trips to national parks (51.6 per cent) and lowest for trips to public lands (22.5 per cent).

Average expenditure per trip by crown land type, 2019/20

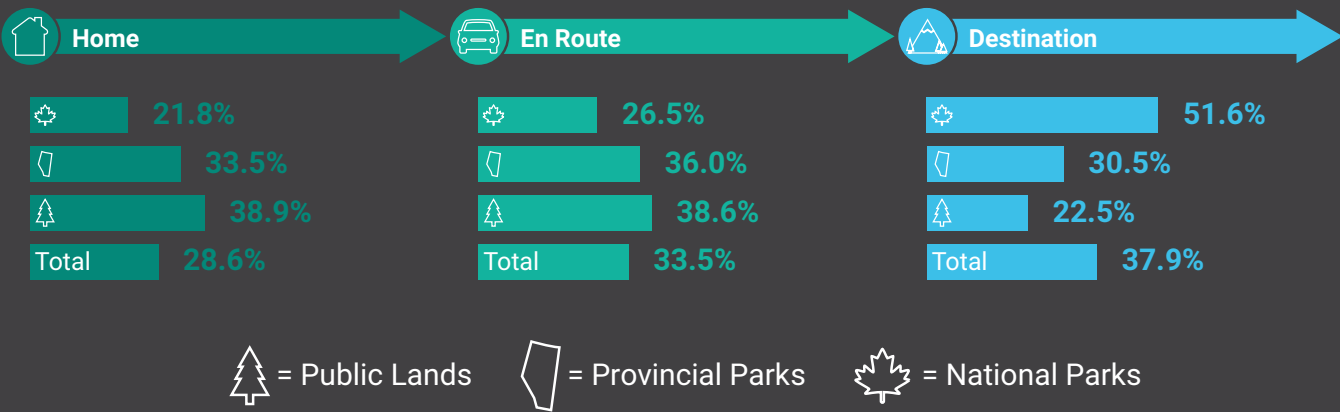
Figure 1



Public Lands Provincial Parks National Parks

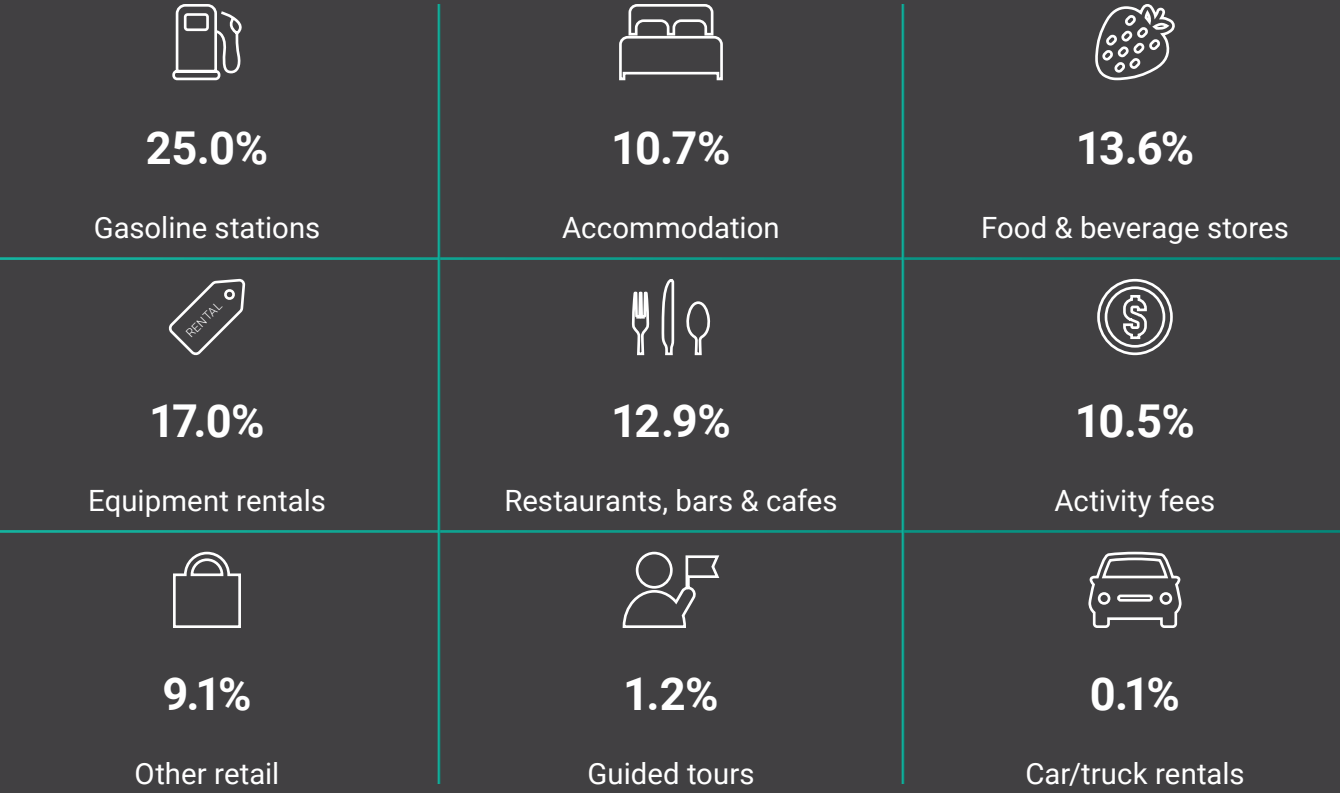
Distribution of trip expenditures by crown land type, 2019/20

Figure 2



Distribution of spending by trip related expenditure category

Of all trip related spending:



Equipment & accessory expenditures

To support their outdoor adventures, Albertan households purchase a wide array of equipment, clothing and accessories. In fact, outdoor enthusiasts who responded to the survey on average spend \$10,282 per household annually on these purchases. But not all households purchase the same items, and the amount spent on these items varies greatly.

Distribution of spending by equipment & accessory expenditure category

Total annual equipment and accessory-related spending is distributed as follows:

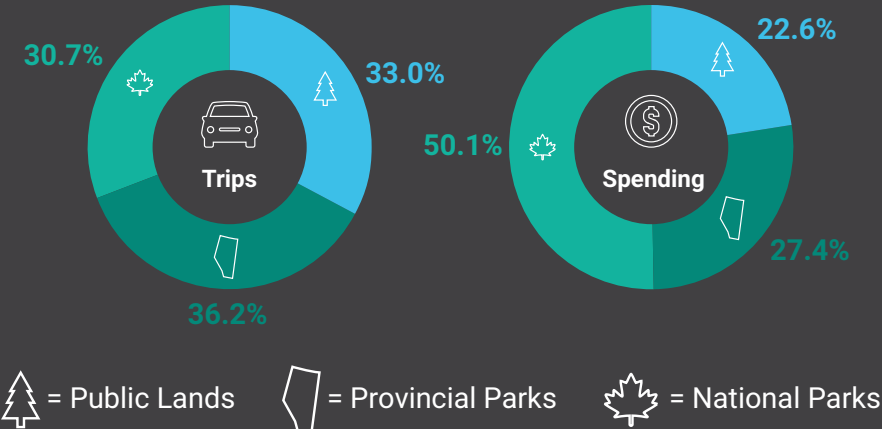
Purchase item	Per cent of households making purchase	Average expense	Per cent of total equipment spending
ATV/side by side	15.9%	\$6,862	11.7%
4X4	8.6%	\$11,320	10.8%
Snowmobile	8.6%	\$8,194	6.9%
Dual sport/off road motorcycle/snowbike	6.6%	\$5,413	6.1%
Bicycle/mountain bike	38.6%	\$3,258	13.8%
Protective equipment	37.2%	\$514	2.1%
Motorized boat	5.6%	\$4,348	5.1%
Non-motorized boat	15.2%	\$1,044	2.1%
Snowshoes	15.8%	\$268	0.4%
Skis/poles/boots	34.7%	\$656	3.4%
Camping equipment	62.4%	\$1,909	13.4%
Fishing & hunting equipment	41.8%	\$902	4.7%
Outdoor specific clothing	72.7%	\$547	4.8%
Equipment & recreational vehicle repairs & maintenance	44.4%	\$1,348	6.6%
Equipment & recreational vehicle insurance	42.3%	\$903	4.3%
Other	9.3%	\$5,841	3.8%
Total average annual household spend on equipment & accessories		\$10,282	

In-destination trip expenditures...

...are highest in the national parks where there are many visitor services and amenities. Opportunity exists to enhance visitor services and amenities on public lands in order to elevate visitor spending from the significant outdoor recreation participation on these lands.

The proportion of spending by crown land type is not consistent with the proportion of trips. This is a significant area of opportunity with great potential.

Despite hosting over 1/3 of all crown land outdoor recreation trips, public lands generate less than 1/4 of all spending. Meanwhile, national parks host 1/3 of trips but generate over half of all spending.



A comparison of annual household spending¹

Transportation
\$15,633

All
Recreation
\$4,594

Health Care
\$2,772

Tobacco &
Alcohol
\$1,920

Education
\$1,719

Personal
Care
\$1,334

Crown Land
Outdoor
Recreation
\$1,173

Household
Appliances
\$551

Home
Entertainment
Equipment &
Services
\$264

Reading &
Other Print
\$200

¹ * Average Alberta Household Spending Values are from 2017

Economic impacts of crown land outdoor recreation

Outdoor recreation is much more than a favourite tradition of Albertans. It is a powerful economic driver with significant untapped potential.

Albertans spend \$2.3 billion on crown land outdoor recreation trips annually, and spend another \$376 million on recreation equipment and accessories related to these trips. Fifty per cent is spent on trips to national parks, 27.4 per cent is spent on trips to provincial parks and protected areas and 22.6 per cent on trips to public lands. This spending contributes \$2.8 billion in provincial GDP (including direct, indirect and induced effects) and generates \$551 million in tax revenues, of which 80 per cent comes from trip-related spending and 20 per cent from equipment purchases.

Although spending related to recreational trips to crown lands only accounts for 0.8 per cent of Alberta's GDP, the employment resulting from this spending is 6.1 times greater than employment in the forest and logging industry, and equates to 63 per cent of jobs in the agricultural industry.

\$2.8
billion GDP

0.8%
of provincial GDP

\$551
million in tax revenue

Outdoor Recreation Creates Jobs & Attracts Businesses



Many communities in the province have, or are in the process of acknowledging that their best assets reside in the nearby crown land, and the outdoor recreation opportunities they offer.

Outdoor recreation attracts families, skilled labour, and businesses to Alberta. In fact, regions of the province with high quality crown land outdoor recreation quickly become magnets for businesses, professionals and retirees who are seeking an active and high quality of life. Whether it be retail sales, guides, equipment manufacturers, outdoor infrastructure designers and builders, or parks and outdoor recreation managers, outdoor recreation provides thousands of jobs for Albertans.

36,000 full-time equivalent jobs are generated by Albertans' spending on crown land outdoor recreation trips and equipment. The average annual wage for employees in this sector is \$41,000.

But outdoor recreation does much more. It indirectly fuels employment in many other sectors, as well such as food and beverage, hotels and lodging, events, transportation, marketing, education, finance and others.

Jobs generated by crown land type



Public lands - **6,900**



Provincial parks & protected areas - **8,600**



National parks - **15,600**



Equipment spending - **4,800**





**Crown land
outdoor
recreation
contributes
1.5%
of total
provincial
employment
(2019).**

Outdoor recreation economic impacts by region





Upper & Lower Peace

 Trip-related expenditures	 Labour income
\$81 M / 3.5%	\$43 M
 GDP (market prices)	 Employment
\$81 M	1,100 FTEs





North Saskatchewan

 Trip-related expenditures	 Labour income
\$761 M / 32.5%	\$401 M
 GDP (market prices)	 Employment
\$766 M	10,100 FTEs

South Saskatchewan

 Trip-related expenditures	 Labour income
\$1,100 M / 46.4%	\$600 M
 GDP (market prices)	 Employment
\$1,100 M	14,400 FTEs





Upper & Lower Athabasca

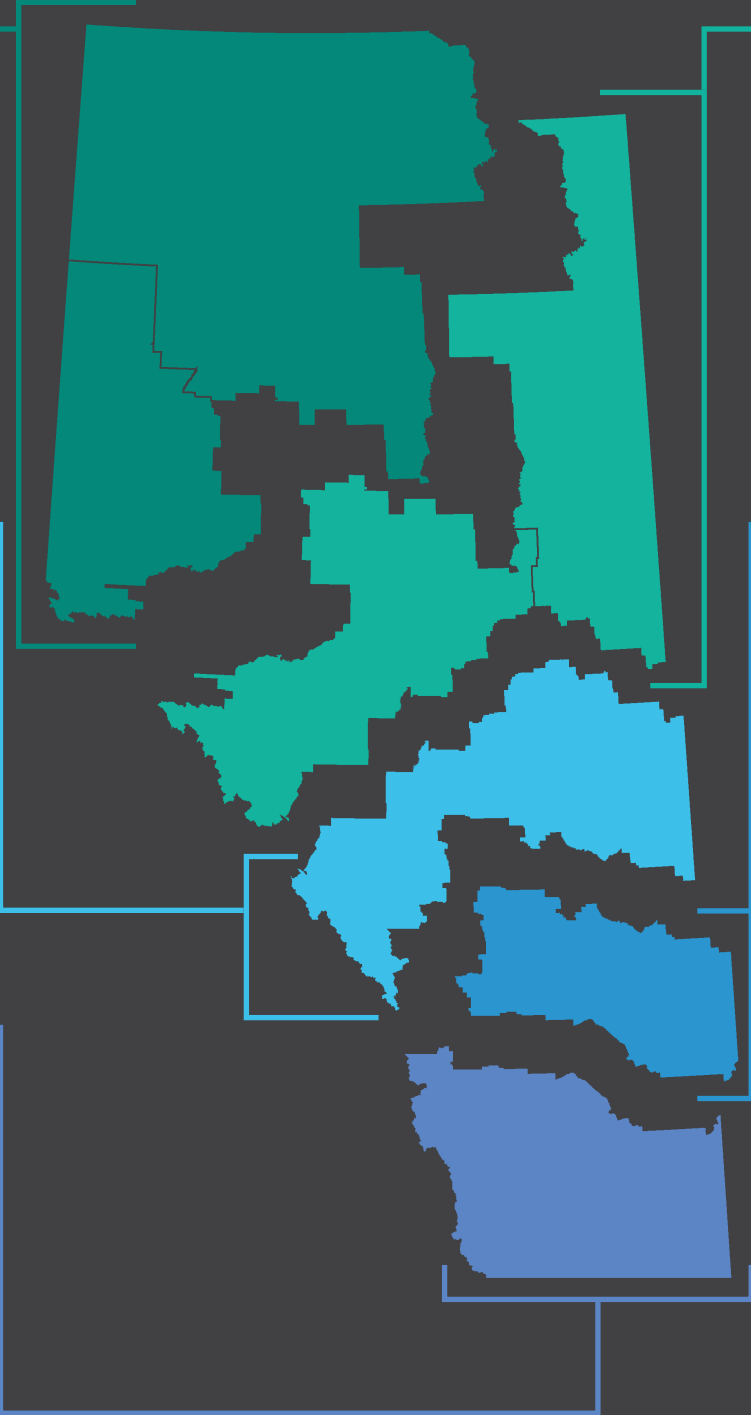
 Trip-related expenditures	 Labour income
\$300 M / 14.7%	\$200 M
 GDP (market prices)	 Employment
\$300 M	4,600 FTEs

Red Deer

 Trip-related expenditures	 Labour income
\$68 M / 2.9%	\$36 M
 GDP (market prices)	 Employment
\$69 M	900 FTEs

Total

 Trip-related expenditures	 Labour income
\$2,300 M / 100%	\$1,200 M
 GDP (market prices)	 Employment
\$2,300 M	31,100 FTEs





Crown land gateway communities

Crown land outdoor enthusiasts often spend money in gateway communities on items such as equipment, gasoline, food and beverage, accommodation, supplies, guiding services, and repairs.

This spending directly benefits these communities and their businesses, with the spend rippling through the economy, creating further economic activity and indirect financial benefits. In turn, this economic activity creates and supports a stable local and regional workforce, which is critical to the well-being of communities that are gateways to crown lands.

Research shows that gateway communities with crown land outdoor recreation economies are more likely to attract new businesses and residents with greater wealth, and have faster growing wages than communities who do not have crown land outdoor recreation economies.

– ORR Transition Policy
(for U.S. reference)

Outdoor Recreation Creates Healthier Albertans & Communities



In addition to impressive economic benefits, crown land outdoor recreation enhances individual and community health and well-being^{1,2,3,4,5}. With more and more physicians prescribing time in nature, outdoor recreation is a deliberate strategy that can help alleviate some of Alberta's most complex social and public health challenges and saves governments money. Physical inactivity represents a significant health and economic burden, with an estimated annual cost to Canadians of \$2.4 billion from direct health effects and an additional \$4.3 billion in indirect costs such as loss of workplace productivity⁶. Investing in enhancements of outdoor recreation can:

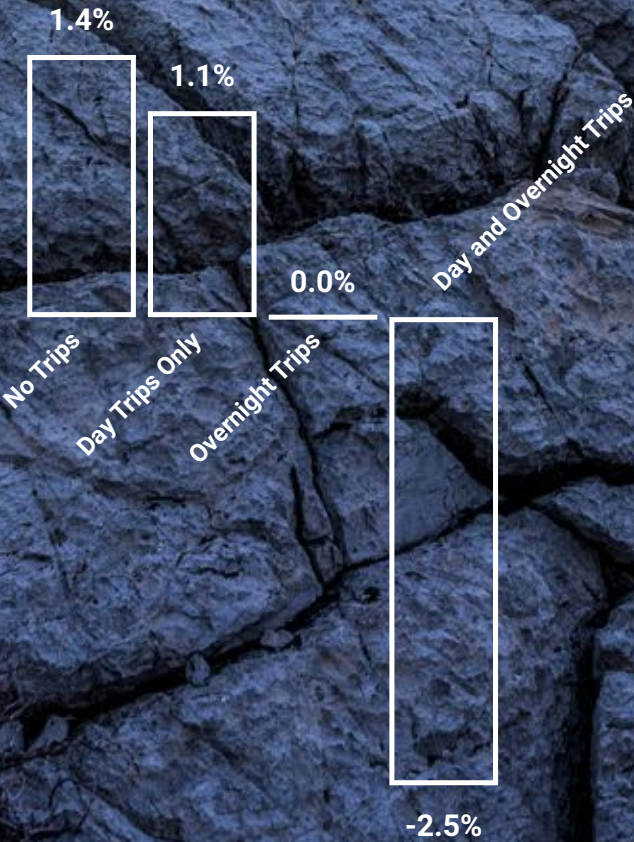
- Improve the physical and mental health and well-being of Albertans^{7,1,2}
- Support community development and social cohesion^{8,3}
- Build community pride and attachment⁹
- Reduce behavioural problems in youth and limit attention deficit and hyperactivity symptoms^{9,4}
- Grow self-confidence, self identity and success in life⁵
- Reduce health care costs¹⁰
- Strengthen relationships between families and friends¹¹
- Reduce crime rates¹² and help socially disadvantaged groups¹³
- Promote sustainability¹⁴
- Create opportunities to learn about and enjoy nature¹⁵
- Help develop the next generation of leaders¹⁶



COVID-19

The importance of crown lands for recreation was amplified as a result of changing usage patterns due to COVID-19 restrictions. In general, these restrictions resulted in a higher percentage of households making no trips and a 2.5 per cent decrease in the number of households making day and overnight trips, although the amount of households making day trips only increased. There was no change in the percent of households only making overnight trips.

Change in percentages of households making trips for recreation due to COVID-19 restrictions



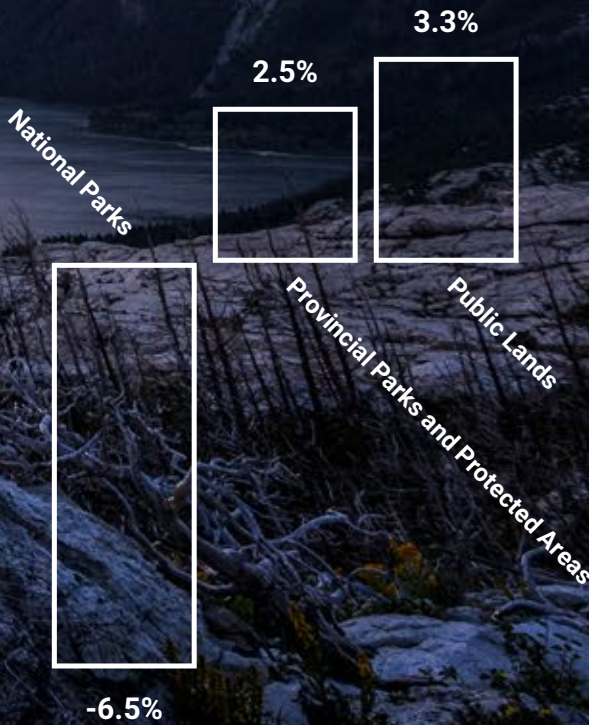
In addition, as a result of COVID-19 restrictions, the number of households only making day trips and overnight trips decreased by more than 23 per cent each, while the households that make both day and overnight visits increased their number of trips, by 17 per cent, with a 22 per cent increase in the number of day trips.

Change in number of trips for recreation due to COVID-19 restrictions



COVID-19 restrictions also caused a change where people chose to make their recreation visits. They reduced visitation to national parks by 6.5 per cent, increased their visits to provincial parks and recreation areas by 2.5 per cent, and visits to public lands increased by 3.3 per cent.

Change in location of trips for recreation due to COVID-19 restrictions



Thus, public lands became much more important to Albertans in 2020/21 as COVID-19 restrictions on travel and requirements for social distancing and self-isolation caused them to seek out alternatives to the national parks for recreation.

A New Era for Outdoor Recreation

Around the world, private sector and governments are recognizing the immense social importance and impressive economic contributions of the outdoor recreation economy. Globally, it is an industry becoming more diverse and stronger each year. Deliberate actions are already being taken around the world to invest in and support the growth of this segment of our visitor economy. Alberta has yet to do so in a deliberate way.

Outdoor recreation is entering a new era. Now is the time for Alberta to deliberately unlock the potential of its outdoor recreation economy and claim its place in the Canadian and international outdoor recreation economies.

Actions to Unlock the Potential of Alberta's Outdoor Recreation Economy

Providing and enhancing crown land outdoor recreation is critical for maintaining the long-standing traditions and way of life of Albertans. But it is also essential to Alberta's economic future.

Outdoor recreation is an opportunity to help Alberta to grow, strengthen and diversify its economy, while improving the health and well-being of our citizens thereby making the province a more attractive place to live, visit and invest. Unlocking the potential of the outdoor recreation economy can provide a powerful path to elevating the vitality of rural economies; especially those that are heavily reliant on Alberta's traditional natural resource sectors. As is shown, public lands support just as many outdoor recreation trips annually, but has lacked planning attention and infrastructure investment and, as a result, generates far less economic benefits compared to crown lands in other places.

A deliberate focus on unlocking the potential of our outdoor recreation will attract new investment and businesses to the province, create more opportunities for Albertans and visitors to vacation in Alberta, and slow the leakage of visitation and recreational investment that Alberta has been missing out on.

To begin this new era, and to unlock the potential of our outdoor recreation economy, the sector needs:

1. A coordinated & unified outdoor voice

Alberta's outdoor sector is fragmented and lacks a unified and coordinated voice. Though there are many outdoor organizations, businesses and not-for-profits, the outdoor industry has yet to come together. A unified and coordinated voice is critical for unlocking the potential of the industry, and ensuring strong and effective government advocacy for supportive policy and investment.

2. Supportive crown land policy

To date, crown land policy views outdoor recreation as a land use that needs to be managed and not as an industry that should be supported and enabled like other traditional crown land industries (oil and gas, forestry, mining). The province needs a supportive crown land policy framework, especially on public lands, that views outdoor recreation as an industry, and one prioritized for growth. Proactive land use planning that establishes clear objectives for the outdoor recreation economy and ensures the integrity of and access to outdoor recreation resources are retained, enhanced and appropriately managed. And, in the case of public lands, deliberate focus on supporting the increase in and improvement of visitor amenities and services will help elevate the economic benefits of outdoor recreation on public lands.

3. Investment in new and renewal of existing crown land outdoor recreation infrastructure

Whether it's trails, campgrounds, boat launches, staging areas, white water play parks or other infrastructure, expenditures on outdoor recreation is an investment that yields significant returns. Alberta's outdoor recreation infrastructure in provincial parks is aging, and outdoor recreation infrastructure on public land is lacking and limited. Unlocking the potential of the crown land outdoor recreation economy requires government, private sector and user investment in new and renewed outdoor infrastructure to provide novel, inclusive, accessible and equitable opportunities for all. Alberta needs to invest in creating world class outdoor experiences that allows the province to compete on the national and international outdoor recreation economy stages.

4. Inventorying of crown land outdoor recreation resources

Outdoor recreation resources are the lifeblood of the outdoor economy. Yet Alberta lacks an up to date inventory of crown land outdoor recreation resources and amenities. The lack of inventory puts the sector at great risk of not being effectively or meaningfully included in land use decisions that can negatively impact the sector.

5. Measure & monitor the outdoor recreation economy

Data on outdoor recreation is fundamental for informed crown land policy decisions. Measuring and monitoring the performance of the crown land outdoor recreation economy and participation should be expanded and ongoing to help the sector demonstrate its positive contributions to communities, Albertans, and the economy.

6. Office of Outdoor Recreation

Jurisdictions around the globe have realized that unlocking their outdoor recreation potential requires deliberate focus. These jurisdictions have established government “Offices of Outdoor Recreation” who provide dedicated attention to coordinating and creating the policy environment, business attraction, investments in, and prioritization of the outdoor recreation economy on crown lands. Success requires coordination across government departments (parks, lands, tourism, recreation), different levels of government and the private sector. These offices reduce governmental silos, listen to public concerns, remove barriers to access, and prioritize programs that encourage growth of the industry and protection of recreation resources.

Methods

The data presented in this report come from two sources. The first was a review of published literature from Statistics Canada and the Government of Alberta that allowed us to determine total recreation visitation by Alberta residents and their associated total expenditures. The second source involved an online survey of households that was undertaken to determine how visitation was distributed among LUF regions, the various crown land types, trip type (day and overnight) and recreational activities, and to obtain better information on trip spending. The survey was available for completion online from April 20 to May 31 of 2021. While 2,947 parties attempted to complete the survey, 486 were completed by non-Albertans, 353 surveys were too incomplete to analyze, 69 surveys appeared to be duplicates, and 640 had no trip data included in the response. This resulted in a total of 1,399 surveys being used as the basis for analysis. The economic impact estimates were derived using the most recent published Statistics Canada economic multipliers for the types of industries that supply goods and services to Albertan households that participate in outdoor recreation.

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Tourism Industry Association of Alberta

The Tourism Industry Association of Alberta or TIAA is a not-for-profit, tourism body that advocates on behalf of all segments of Alberta’s tourism economy for a competitive and sustainable business environment that generates substantial economic value for the province. TIAA’s vision is that Alberta’s tourism industry will be the driving force of sustainable community economic development.

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Members of the Alberta Outdoor Recreation Advisory Panel

The Alberta Outdoor Recreation Advisory Panel was established to guide and inform this research and promote the survey to Albertans. TIAA would like to acknowledge the following organizations for their support of and participation in the project:

- Alberta Recreation & Parks Association
- Alpine Club of Canada
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- Alberta Equestrian Federation
- Alberta Hiking Association
- Alberta Fish and Game Association
- Alberta Off Highway Vehicle Association
- Alberta Outfitters Association
- Alberta Snowmobile Association
- Alberta TrailNet
- Alberta Whitewater Association
- Association of Canadian Mountain Guides
- Backcountry Hunters and Anglers - Alberta Chapter
- Canada West Ski Areas Association
- Nordiq Alberta
- Paddle Alberta
- Parks and Campground Owners Association of Alberta
- Recreational Vehicle Dealers Association of Alberta
- Ride the Rockies Society

Appendix

Activity Participation by the Numbers

Primary motivating activity per trip	Visits		Household participation rate	Average per trip	Expenditures	
	Millions	Percent			Millions	Per cent
Hiking/walking/running	4.171	31.1%	85.5%	\$298	\$581	24.9%
Camping	1.594	11.9%	60.1%	\$396	\$295	12.6%
Skiing/snowboarding	1.066	8.0%	39.9%	\$467	\$233	10.0%
Fishing	0.711	5.3%	44.1%	\$301	\$100	4.3%
Mountain biking	0.676	5.0%	39.9%	\$345	\$109	4.7%
Cross-country skiing	0.639	4.8%	34.7%	\$250	\$75	3.2%
Hunting	0.556	4.2%	26.8%	\$1,011	\$263	11.3%
Ski touring	0.529	3.9%	30.1%	\$264	\$65	2.8%
ATV	0.462	3.4%	28.5%	\$1,318	\$83	3.6%
Snowshoeing	0.341	2.5%	21.5%	\$207	\$33	1.4%
Lake boating	0.328	2.4%	33.1%	\$324	\$50	2.1%
Biking	0.306	2.3%	28.9%	\$247	\$35	1.5%
Equestrian	0.305	2.3%	35.3%	\$341	\$49	2.1%
Sightseeing	0.281	2.1%	na	\$519	\$68	2.9%
Backpacking	0.229	1.7%	63.9%	\$286	\$31	1.3%
Climbing	0.177	1.3%	23.4%	\$312	\$26	1.1%
Wildlife viewing	0.154	1.1%	53.8%	\$475	\$34	1.5%
Photography	0.136	1.0%	51.5%	\$388	\$25	1.1%
4x4	0.114	0.9%	28.0%	\$1,318	\$70	3.0%
Snowmobiling	0.106	0.8%	5.5%	\$390	\$19	0.8%
Random camping	0.091	0.7%	55.6%	\$305	\$13	0.6%
Ice climbing	0.089	0.7%	na	\$340	\$14	0.6%
River boating	0.079	0.6%	23.2%	\$242	\$9	0.4%
Motorcycle riding	0.076	0.6%	18.2%	\$347	\$12	0.5%
Mountaineering	0.055	0.4%	30.6%	\$211	\$5	0.2%
Skating/sledding	0.049	0.4%	na	\$289	\$7	0.3%
Dirt biking	0.044	0.3%	15.8%	\$1,371	\$28	1.2%
Picnicking	0.021	0.2%	na	\$167	\$2	0.1%
Swimming	0.010	0.1%	47.1%	\$465	\$2	0.1%
Power boating	0.006	0.0%	7.4%	\$46	\$0	0.0%
Total	13.400	100.0%			\$2,338	100.0%



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