





2005 Report

Economic Impact

of Provincial Heritage

Facilities in Alberta

Alberta







Message from the Minister



Alberta's outstanding network of historic and cultural facilities showcases the history, heritage and the people of Alberta. They contribute to making our history real, to be enjoyed by all visitors.

Equally important, as centres of culture, learning and growth, is their substantial and substantive contributions to the provincial and local economies in which they are located. From the Oil Sands Discovery Centre in the north, to Head-Smashed-In Buffalo Jump in the south, the facilities attract an average of one million visitors per year creating a cumulative economic impact of more than \$70 million annually. They provide educational opportunities, attract visitors and encourage Albertans to travel more within the province. These are places that share ideas, teach and entertain, preserve and protect our shared heritage.

This year, in 2005, Albertans are celebrating the province's centennial. The focus of centennial festivities and projects is to celebrate our past and imagine our future. Alberta is moving into its future with a long-term vision that will create new opportunities. Over the next 20 years, we will be guided by four "pillars" – unleashing innovation, leading in learning, competing in a global marketplace, and making Alberta the best place to live, work and visit. I am confident that as we move ahead into the 21st century, Alberta's network of provincial historic and cultural facilities will continue to play a key role in preserving our proud past that reinforces the importance and value of Alberta's rich history – because history is what makes us unique as a city, as a province, and as a people and serves as a reflection of our province's life.

Gary G. Mar, Q.C. Minister of Community Development M.L.A. Calgary MacKay



Royal Alberta Museum

How to Interpret this Report

The economic data in this report are based on the 2003/04 fiscal year April 1 to March 31. These data are gathered from surveys given to visitors to the museums, historic sites and interpretive centres managed by the Government of Alberta.

The primary role of these facilities is to preserve and tell the natural and cultural history of Alberta — to both Albertans and visitors to the Province. Over 100,000 school children receive educational programs in these facilities each year.

The economic benefit of these services is impossible to estimate but the long-term societal benefit of museums and historic sites, to a region, is well understood.

A secondary role of these facilities is to attract visitors from outside the province and to encourage Albertans to travel within the province. Tourist destinations generate economic activity. The direct operation of these facilities produces a positive financial impact in their immediate region through salaries, the purchase of supplies and services, and associated taxation. The fiscal as opposed to social impact of these facilities is the subject of this report.

This report will be useful to provincial, municipal and regional authorities in evaluating the economic significance of heritage attractions. The data will be helpful to students, planners, developers and the tourism industry. Finally, it is important that these data be available to residents of Alberta, because as taxpayers, they are the key stakeholders in all of these facilities.

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front cover photos (from left to right): Head-Smashed-In Buffalo Jump, Reynolds-Alberta Museum, Ukrainian Cultural Heritage Village back cover photos (from left to right): Remington Carriage Museum, Father Lacombe Chapel, Royal Tyrrell Museum



Highlights

Current economic returns

Despite a worldwide downturn in the tourism and travel industry in recent years, Alberta's 19 provincially operated museums, interpretive centres and heritage sites* continue to attract close to one million visitors per year. These facilities are icons of the tourism industry in the province and anchor attractions throughout Alberta. In addition to their obvious educational, recreational and social benefits, the province's heritage facilities have a significant cumulative economic impact, including tourism and government tax revenues, estimated at more than \$70 million.

- Heritage facilities bring in "new money" by attracting visitors from outside the local communities. These visitors pay admission and program fees, and make purchases in the gift shops and on-site food services areas. More significantly, the visitors also spend money in the region, buying gas, eating at local restaurants, staying in local accommodations and purchasing souvenirs and supplies. The vast majority of visitor spending generates economic benefits for the surrounding communities. In 2003, visitors to provincial heritage facilities spent approximately \$24 million on food, accommodation and travel in Alberta.
- Heritage facilities hire staff and spend their budgets on materials, services, utilities

- and insurance. In recent years the facilities spent about \$18 million on their operations. Over 1,100 new full-time jobs were created throughout the province. The businesses that supply materials and services to heritage facilities recycle these funds into the local economy.
- All of this activity contributes directly or indirectly to the local and provincial economies and indirectly provides tax revenues to all three levels of government: federal, provincial and local. Estimated tax revenue derived in 2003: federal, \$3.2 million; provincial, \$6.6 million; and local, \$2.3 million.

* Provincial Archives of Alberta and Turner Valley Gas Plant (under development) are excluded from current economic impact estimates.

Brooks Aqueduct Head-Smashed-In Buffalo Jump Reynolds-Alberta Museum

Reynolds-Alberta Museum

The state of t

"This is a fabulous place"

visitor to Royal Alberta Museum

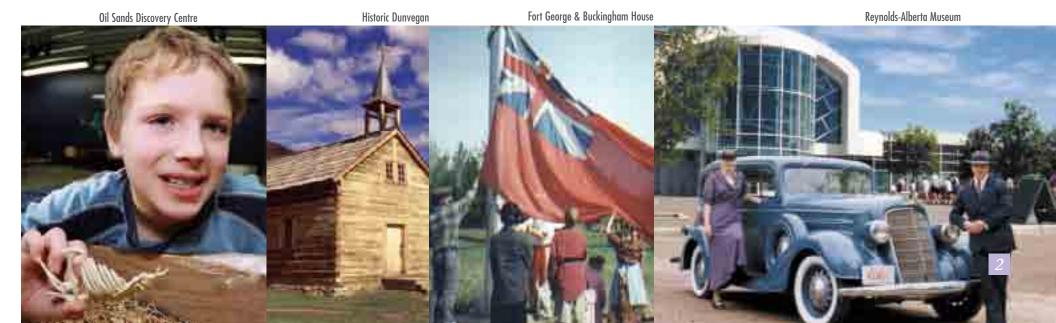
- Many of the major facilities generated revenues equal to their capital construction costs more than a decade ago, and continue to generate revenue within their associated regional service economies (direct and indirect returns).
- Alberta's heritage facilities have learned to operate efficiently and attract an exceptionally active volunteer corps as well as substantial funding from the private sector. As a result, in some cases their core operational costs are less than the amount of money they bring in, either directly or indirectly an outstanding achievement for an activity of this nature. The volunteer support for provincial heritage facilities is noteworthy. In 2003, a total of 1,200 volunteers donated over 47,000 hours of their time.

Potential for growth

Several of Alberta's heritage facilities, including the Royal Tyrrell Museum in Drumheller and Head-Smashed-In Buffalo Jump near Fort Macleod, are recognized as world-class sites and are visited by tourists from around the world. Others have strong regional interest, making an important cultural contribution and adding to the local economy.

In short, Alberta's high-quality heritage facilities have real economic power. This segment of Alberta's culture and economy is particularly important for two reasons. First, tourism is one of the largest industries in Alberta. Second, heritage tourism is

becoming increasingly popular, and "heritage tourists" are generally willing to spend considerably more, travel further and stay longer, according to visitor surveys. Alberta Community Development uses two major tools to collect and interpret information about the impact of provincial heritage facilities: a visitor survey; and, a computer model for determining economic impact. These tools provide the department with performance measures such as value-added economic impact, customer satisfaction, knowledge gained by visitors and the amount of estimated tax revenue generated by heritage tourism. The department uses the information to improve the facilities' operations and services, such as building amenities, marketing, interpretive programming and economic planning.



Introduction

This report describes:

- heritage facilities owned and operated by the Province of Alberta
- how Albertans benefit from their heritage facilities, financially as well as culturally

Background

During the 1980s, the Government of Alberta launched several major initiatives designed to diversify, decentralize and strengthen its economy. One of those initiatives was the construction of new museums, interpretive centres and historic sites throughout the province. For a decade or more, a new heritage facility was opened almost every year, at an average cost of \$10 million per facility. This rate of growth was unprecedented internationally.

During this active growth period, the Alberta government also recognized the importance of regularly assessing the economic returns on its major capital investments. An annual visitor survey was conducted at each heritage facility, and through the collaborative efforts of Alberta Community Development and Alberta Economic Development, an economic impact model was used to interpret the data collected. Data collected include: the number of visitors; where they are from; their ages;

what their interests are; how satisfied they are; and, how much they spend during their visits to heritage facilities. This information is used to guide decisions about facility amenities, marketing, interpretive programs and economic planning.

Alberta was the last Canadian province to open a provincial museum (in 1967), and, until the early 1980s, the provincial government's heritage preservation activities focused primarily on research and resource management. However, over the past 25 years the Government of Alberta has designed, constructed and marketed an impressive array of heritage facilities, each celebrating aspects of Alberta's unique and colourful history.

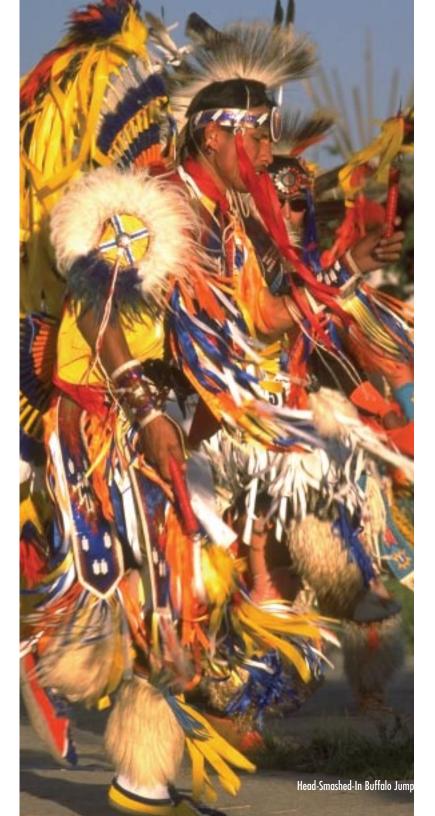
Alberta's major heritage facilities are worldclass sites that attract significant numbers of Canadian and international tourists. Although the smaller ones have fewer visitors and generate lower financial returns, they provide their regions with an important cultural focus and highlight various features of Alberta's history.

"The best we've see<u>n!"</u>

visitor to Reynolds-Alberta Museum

Facts about some of Alberta's Heritage Facilities

- The internationally renowned Royal Tyrrell Museum near Drumheller is Canada's premier palaeontology museum. It attracts visitors from around the world.
- Head-Smashed-In Buffalo Jump near Fort Macleod is an UNESCO World Heritage site, a National Historic Site as well as a Provincial Historic Site. This facility conveys the history of the daily life and special ceremonies of the Blackfoot bison-hunting culture of the plains.
- The Reynolds-Alberta Museum at Wetaskiwin displays an exceptionally large collection of vehicles, tractors, aircraft and other machines.
- The small but fascinating Victoria Settlement site near Smoky Lake, with its 1864 Clerk's Quarters and 1906 Methodist Church, brings back the sense of the furtrading and missionary days.
- The Frank Slide Interpretive Centre provides the dramatic story of coal mining in Alberta's Crowsnest Pass, and the tragedy of the collapse of Turtle Mountain in April, 1903 that buried part of the town of Frank. At least 70 people died.



How Albertans benefit from their provincial heritage facilities

Alberta's provincial heritage facilities have intrinsic value.

- They are special places that Albertans can visit to learn about the rich history and heritage of this province.
- They are interesting and stimulating cultural attractions that preserve and protect our shared heritage.
- They instill community pride and serve as educational, cultural and recreational centres.
- Like all other artistic and cultural endeavors, heritage facilities enhance our quality of life.

In addition, provincial heritage facilities are helping to diversify, decentralize and strengthen Alberta's economy. These facilities provide an excellent return on taxpayers' investment by stimulating cultural tourism, which in turn generates new service and retail sector revenues. Approximately one million people visit Alberta's provincial heritage facilities each year. In 2003, the cumulative economic impact related to the heritage facilities was estimated at \$70 million.

Heritage tourism is a continually growing sector of the global economy. Despite a worldwide downturn in recent years, the overall economic impact of heritage facilities remains positive. Alberta's high-quality and popular heritage facilities have real economic power. Their impact on the communities where they are located includes measurable economic gains.

Alberta's Future Budget Directions and Provincial Heritage Facilities

Alberta is moving into its next century with a long-term vision that will create new opportunities. Four areas of focus, or "pillars", guide the direction that the provincial government will take over the next 20 years. These are:

- Unleashing Innovation
- Leading in Learning
- Competing in a Global Marketplace
- Making Alberta the Best Place to Live, Work and Visit

These four pillars support many aspects of the government's major initiatives including health care, education and science/technology. Also, our outstanding provincial heritage facilities play an important role in all of these areas.

Unleashing Innovation: Provincial heritage facilities continually adopt new technology to update their programs and products, such as, virtual museums, state-of-the-art exhibit infrastructure, electronic archives, etc.

Leading in Learning: School children are among the largest visitor groups at several of the heritage facilities described in this report, and most visitor groups are intergenerational (parents or grandparents with children). In 2004 provincial heritage facilities offered curriculumbased and family-oriented learning opportunities to 80,000 program participants.

Competing in a Global Marketplace: Heritage facilities in Alberta attract tourists from all over the world.

Making Alberta the Best Place to Live, Work and Visit: Heritage facilities improve the lives of people in the communities where they are located, and they make these communities attractive.

Tourism Trends in Canada and Alberta

Tourism is one of the fastest-growing industries today – many futurists say it will soon be the world's number one industry. More importantly, heritage tourism is a rapidly growing sector of that industry. Various sources suggest that 10% of tourism can be attributed solely to heritage and cultural activities, and that as much as 33% of tourism is at least partially the result of participation in that type of activity.

National trends

International tourism in Canada

• Canada welcomes a significant number of international tourists each year. Close to 39

million non-resident visitors came to Canada in 2004.

- International tourist spending totalled \$54 billion in 2000.
- The most common country of origin for international tourists to Canada is the United States, with 27 million Americans visiting in 2004.
- Each year, Canada welcomes hundreds of thousands of tourists. In 2001 visitors numbered: 826,000 from the United Kingdom; 409,900 from Japan; 357,300 from France; and 330,200 from Germany.

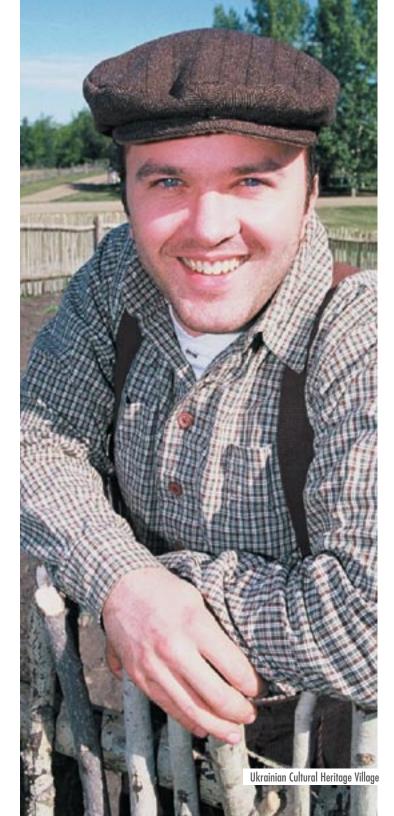
Visitor facts

Approximately half of the trips taken in

Canada are for pleasure, recreation and holidays, as opposed to visiting friends or relatives, business travel and other purposes of travel. An increasing amount of vacation travel involves exploration of our culture and history.

- For international tourists in 1999, 39% visited our historic sites and parks, and a further 29% went to a zoo, museum, art gallery or natural display.
- In 1999, Canadians took 16 million trips in their country that involved at least one cultural/heritage activity.
- Visits to historic sites were the most popular activity for those who took culture/heritage trips, and it is this area that has





shown the most growth since 1996. Visiting museums or galleries was second, followed by attending events.

• The 1997 Canadian Travel Survey showed person-trips travelling 80 km or more to historic sites (approximately 4.6 million) were greater than golfing holidays (approximately 3.3 million).

Increasing interest in heritage tourism

The overall level of interest in heritage tourism among Canadians seems to be increasing. In 1998:

- Approximately one third of Canadians aged 15 years or over indicated that they had visited a museum in the past 12 months, including 22% who visited a public art gallery or art museum, 13% who visited a science and technology centre, 11% who visited a general history or community museum and 9% who visited a commercial art gallery.
- 4% indicated that they had viewed an art or museum collection over the Internet.
- 32% of Canadian households spent \$374 million on admissions to museums in 2001.

The type of tourists who visit heritage facilities is another factor to consider in assessing economic impact. Heritage tourists are likely to spend more money during their trips. Surveys show that they are better educated, have higher than average income and are willing to spend considerably more, travel further and stay longer than other tourists.



Victoria Settlement

Provincial trends

Tourism in the Alberta economy

Alberta's economy has always been focused on agriculture and, since the 1950s, on oil, gas and to some extent forestry. However, today, tourism is the fourth-largest industry in the province, employing about 100,000 Albertans. In 2002, the tourism industry generated \$5.7 billion in economic impact and over \$2 billion in tax revenue for three levels of government.

The destinations of visitors to Alberta

Although most visitors to Alberta currently plan to go to the national parks, West Edmonton Mall, the Calgary Stampede and/or a few other popular attractions in Edmonton and Calgary, Statistics Canada's survey indicated that annually there are 6 million visits to a museum in Alberta. With adequate marketing and the maintenance of high-quality programs and exhibits, it is possible to increase the number of visitors to these facilities, and consequently benefit the communities where these facilities are located.

Interest in heritage facilities

- A random phone survey of 1000 Albertans in 2001 indicated that some 68% had visited an Alberta museum, historic site or interpretive centre in the past 12 months.
- The number increases to 73% for Albertans aged 45 to 64.
- The statistic for university graduates was 80%, and for individuals with higher incomes (\$40,000 or more), it is 75%.
- Some 94% of Albertans surveyed indicated that historical resources are very important (56%) or somewhat important (38%) in contributing to the overall quality of life in Alberta.

These high attendance rates fit well with the findings of Alberta Community Development's annual survey of visitors to provincial heritage sites (2004).



Provincial Archives of Alberta

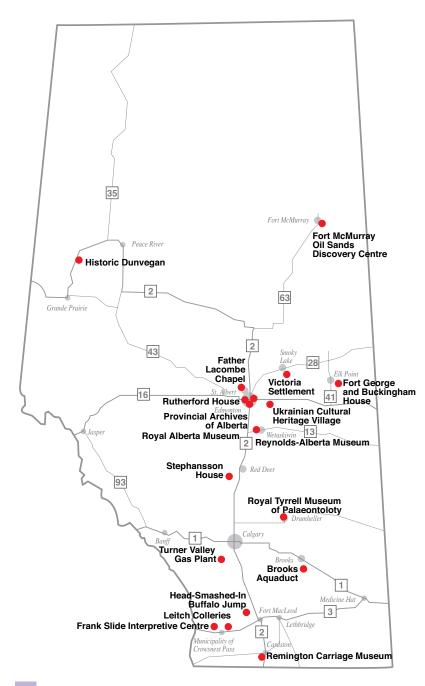
The survey found that:

- Overall, customer satisfaction at the provinces' heritage facilities is at an extremely high level: 98% of visitors thought the facilities were excellent or good. The same survey indicated that 91% of visitors rated "knowledge gained" as "Excellent" or "Good."
- Provincial facilities were ranked as good or even superior to other museums or historic sites in Canada (80%).

"What a magnificent facility"

visitor to The Provincial Archives of Alberta





Alberta's Provincial Heritage Facilities

List of facilities and their locations

Alberta has 19 provincial heritage facilities that are located throughout the province.

Major facilities

Royal Tyrrell Museum, Drumheller
Royal Alberta Museum, Edmonton
Head-Smashed-In Buffalo Jump, northwest of Fort Macleod
Ukrainian Cultural Heritage Village, east of Edmonton
Reynolds-Alberta Museum, Wetaskiwin
Frank Slide Interpretive Centre, Crowsnest Pass
Oil Sands Discovery Centre, Fort McMurray
Remington Carriage Museum, Cardston
Provincial Archives of Alberta, Edmonton

Other facilities

Rutherford House, Edmonton

Tyrrell Field Station, northeast of Brooks

Historic Dunvegan, south of Fairview

Leitch Collieries, Crowsnest Pass

Victoria Settlement, Smoky Lake

Stephansson House, southwest of Red Deer

Brooks Aqueduct, southwest of Brooks

Father Lacombe Chapel, St. Albert

Fort George & Buckingham House, southeast of Elk Point

Turner Valley Gas Plant, Turner Valley

Major Facilities

The following section describes the nine major provincial heritage facilities, which collectively (not including the **Provincial Archives of** Alberta), attract a large majority (90% or more) of the visitors to heritage facilities in Alberta. These facilities contribute well over 90% of the total economic impact. Several of these facilities have generated revenues for their local and regional service economies in amounts equal to or have exceeded the taxpayers' investment in building them.

Royal Tyrrell Museum

Description/mandate:

The Royal Tyrrell Museum, formerly known as the Royal Tyrrell Museum of Palaeontology, celebrates the long history and spectacular diversity of life on earth – from the tiniest grains of pollen to the mightiest dinosaurs. The Museum is internationally recognized for its palaeonotological research, collections of extraordinary educational and scientific value, and dynamic galleries. Visitors also have the opportunity to experience the Canadian badlands where the fossils on display were found. Innovative educational programming for children and their families provides fulfilling experiences for all age groups.

Location: 6 km northwest of Drumheller **Land base:** Midland Provincial Park **Main facility size:** 15,000 m² / 162,000 ft²

Opening date: 1985

Original capital cost: \$27.5 million **Annual number of visitors:** The Museum is the best-attended provincial heritage facility, with about 340,000 visitors in 2003-04 and an average of 375,000 visitors in the last 5 years.

Visitor facts:

- This site is a major destination for Canadian and international visitors.
- In 2004, 95% of the visitors were non-locals; 51% were non-Albertans.
- Each year visitors come from across Canada, from over 40 states and approximately 40 other countries.

Economic impact:

This site generates the highest economic gross output of all provincial heritage attractions. In other words, each year this site generates a cumulative economic impact of \$33 million, which is greater than the original capital cost.

• In 2003, Royal Tyrrell Museum visitors spent

over \$15.3 million on accommodation, travel, food and other trip-related activities in Alberta, and the facility spent about \$5 million on operations.

- The Museum's net economic impact from tourism in 2003 was \$23 million.
- The federal, provincial and local governments collect over \$10 million in tax revenues resulting from the operational and tourism impacts of the Tyrrell Museum.
- As a result of this facility's operations and the tourist activity it attracts, 500 new full-time jobs were created throughout the province in 2003/04.

Looking ahead:

Currently, the Museum is formulating a long-term plan for its future directions. These include, but are not limited to: a major gallery renewal and expansion; the development of new programs for visitors; and, a network of ancillary facilities to connect significant dinosaur finds.



Royal Alberta Museum



Description/mandate: Royal Alberta Museum, formerly known as the Provincial Museum of Alberta, is a showcase for Alberta's human and natural history; a research institution that curates Alberta's history, and a primary steward of artifacts illustrating Alberta's past. Its long-term galleries, temporary exhibitions and special events help visitors to understand Alberta's colourful heritage and unique environment. The Museum features pictographs and petroglyphs; pre-historic plant-eaters; golden eagles, bison and bugs; an exploration of mountains, forests, the windswept prairie, and much, much more.

Location: Edmonton

Land base: 5.4 ha / 13.5 acres **Facility size:** 2,300 m² / 232,000 ft² Opening date: 1967
Original capital cost: \$9.2 million (1967)
Annual number of visitors: The
museum hosted 218,000 visitors in 2003/2004.
5 year average is 224,000 visitors.

Visitor facts:

- 69% of patrons are from the Edmonton region.
- More than 60,000 schoolchildren experience museum programs each year.
- The Museum hosts a large number of repeat visitors, and through its programs, serves more children aged 12 and under than other sites.
- This museum offers a comprehensive Facility Rental Program, with more than 50,000 people annually renting space for events.

Economic impact:

Each year, similar to the Royal Tyrrell Museum, Royal Alberta Museum generates a cumulative economic impact that exceeds the original capital cost of this reputable facility.

- In 2003, museum visitors spent more than \$1.5 million on accommodation, travel and food in Alberta.
- Based on the survey of independent visitors, (only 47% of the Museum's total attendance) the net economic impact from tourism alone was estimated at \$9.5 million. Independant visitors do not include a bus tour, school group, seniors group or other scheduled group visits.

- The Museum hosts over 60,000 people who use the facility for meetings or events. Impact on the private sector could be near \$1 million annually in rental, catering and equipment fees. In addition, another \$6 million from out-of-town guests who attended events at the Museum is a reasonable forecast.
- As a result of the Museum's operations, 238 new full-time jobs were created throughout the province in 2003/04.

Note: More in-depth analysis will be required to estimate the additional economic impact of this site because it is located in a major city and its functions include public education as well as tourism.

Looking ahead:

Planning for a major renewal of Royal Alberta Museum is underway, including an expansion of gallery and storage spaces, a refined focus on Alberta's history, a strong link to Edmonton's river valley and an emphasis on showcasing interactive exhibitions that enhance the visitor's expectations and experiences.



Head-Smashed-In Buffalo Jump



Description/mandate: This site, the oldest, largest and best-preserved buffalo jump site in North America, was designated by UNESCO in 1981 as a World Heritage Site. It is also a National and a Provincial Historic Site. For more than 6,000 years, Aboriginal hunters stampeded herds of buffalo over the cliffs in this scenic spot. The facility features Native interpreters, walking trails and a seven-tiered interpretive centre buried in the cliff adjacent to the jump. Visitors learn about the land, the bison-hunting culture of the plains, and the science of the site's archaeology. This facility links young Aboriginals to their heritage and non-natives to Aboriginal culture.

Location: 18 km northwest of Fort Macleod

in the Porcupine Hills

Land base: 882 ha / 2,180 acres **Facility size:** 2,300 m² / 25,000 ft²

Opening date: 1987

Original capital cost: \$9.3 million **Annual number of visitors:** Head-Smashed-In had over 77,000 visitors in 2003-04; a 5-year average of 86,000 visitors.

Visitor facts:

• Similar to the Royal Tyrrell Museum, Head-Smashed-In Buffalo Jump, attracts a large percentage of international visitors. • In 2004, 58% of visitors were from outside Alberta; 97% were non-locals.

Economic impact:

The cumulative economic impact estimated for this site in 2003 was \$5.9 million.

- Visitors who came to this site in 2003 spent over \$2.8 million on accommodation, travel and food as well as other trip-related activities in Alberta.
- Economic impact from tourism in the province totals \$4.1 million.
- A total of \$1.8 million in tax revenues is collected by the three levels of government (federal, provincial and local) on the operational and tourism impacts of the museum.
- As a result of this facility's operations and the tourist activity it attracts, 87 new full-time jobs were created throughout the province in 2003/04.

Looking ahead:

Working with various Aboriginal communities, Alberta Community Development hopes to encourage further development in the interpretation of Aboriginal culture across the province in the years to come. There is both a tourism demand, and a wish by Aboriginals to tell their stories.

Ukrainian Cultural Heritage Village



Description/mandate: This site is a living history museum showcasing Ukrainian settlement in east central Alberta from 1892 to the 1930s. Costumed role players portray real-life Ukrainian settlers from the turn of the century. There are over 30 buildings on this award-winning site, including churches, a blacksmith shop and a sod hut. Other features include active farmsteads, period

agricultural demonstrations, a rural townsite with a variety of enterprises and regularly scheduled special events. This site is an Attractions Canada winner, for Best Outdoor Site in Alberta.

Location: 25 minutes east of Edmonton on

Hwy 16

Land base: 146 ha / 360 acres

Facilities: More than 30 period buildings

and a modern interpretive centre

Opening date: 1975

Original capital cost: \$16.2 million (1971

and 1975)

Annual number of visitors: There were about 45,000 visitors to the site in 2003-04 and an average of over 50,000 in the last 5 years.

Visitor facts: In 2004, about 25% of visitors were from outside Alberta; 90% were non-local.

Economic impact:

The cumulative economic impact estimated for this site was \$4.5 million.

- Visitors who came to the Ukrainian Cultural Heritage Village in 2003 spent \$680,000 on accommodation, travel and food as well as other trip-related activities in Alberta.
- The economic impact from tourism in the province totals over \$3.1 million
- A total of \$1.4 million in estimated tax revenues is collected by the three levels of government (federal, provincial and local) on the operational and tourism impacts of the museum.



• As a result of this facility's operations and the tourist activity it attracts, 75 new full-time jobs were created throughout the province in 2003/04.

Looking ahead:

This site's Enrichment Project, involving a partnership between the Friends of the Ukrainian Village Society and Alberta Community Development, is a plan to acquire, restore and present additional historical structures located throughout east central Alberta. There is a pressing need to take quick action before these structures are destroyed by fire, vandalism, neglect and/or demolished to make way for new buildings. Another challenge is obtaining historical information from the people who remember when these structures were in active use, as many of these Albertans are now 85 to 90 years old. As of February 2005, nine buildings have been acquired under the "Rescuing Heritage" initiative, with plans to restore these structures as time and budget permit.

Reynolds-Alberta Museum



Description/mandate: Celebrating the "Spirit of the Machine," this outstanding 5,500 item collection of vehicles, aircraft, tractors and industrial artifacts pays tribute to the evolution of machines. Visitors can cruise in a 1927 Model T Touring car or soar in an open cockpit biplane, as well as enjoy the extensive display galleries. This facility offers interpreter-led tours, allows visitors to watch museum-quality restorations in progress and regularly hosts special events. It houses an award-winning reference centre with more than 3,000 publications and 25,000 pieces of trade literature. Its theatre presents specially produced films such as Changing Gears and Stan Reynolds – The Great Collector. The museum is also home to Canada's Aviation Hall of Fame, which pays tribute to more than 180 men and women who pioneered and advanced aviation in Canada.

Location: 2 km west of Wetaskiwin **Land base:** 84.5 ha / 209 acres

Facility size: (approx.) 24,907 m²/268,000

ft²

Opening date: Fall 1992

Original capital cost: \$22.5 million **Annual number of visitors:** This site had approximately 43,000 visitors in 2003-04 and a 5-year average of over 46,000 visitors annually.

Visitor facts: In 2004, 68% of visitors were from other parts of the province; 18% were from outside Alberta.

Economic impact:

The cumulative economic impact for this site was estimated at \$4.6 million.

- Visitors who came to the Museum in 2003 spent over \$650,000 on accommodation, travel and food as well as other trip-related activities in Alberta.
- Economic impact from tourism in the province totals over \$3.2 million.
- A total of more than \$1.4 million in estimated tax revenues is collected by the three levels of government (federal, provincial and local) on the operational and tourism impacts of the museum.
- As a result of this facility's operations and the tourist activity it attracts, 76 new full-time jobs were created throughout the province in 2003/04.

Looking Ahead:

The Museum is hosting a blockbuster exhibition, "Life and Times of the Motorcycle" in 2005-06. A long-term plan for the museum is being developed.





Frank Slide Interpretive Centre

Description/mandate: Against the backdrop of the Frank Slide, the Interpretive Centre provides the story of the rich history of the Crowsnest Pass, Alberta's most southerly gap through the Canadian Rockies and an area known for early coal mining, railroading and forestry. Visitors to the centre can view the award-winning audio-visual presentation *In the Mountain's Shadow*, and a new high-definition product, *On the Edge of Destruction – The Frank Slide Story*, as well as the Centre's exhibits and walking trails.

Location: 1 km off Hwy 3, Municipality of

Crowsnest Pass

Land base: 64 ha / 158 acres **Facility size:** 1,200 m² / 13,000 ft²

Opening date: 1985

Original capital cost: \$6.5 million **Annual number of visitors:** This site had 33,000 visitors in 2003-04 and a 5-year average attendance of 45,000 visitors.

Visitor facts:

• In 2004, 59% of the visitors to this site were from outside Alberta. Most Albertans

who visited were from outside the Crowsnest region.

• Although many visitors who were surveyed stated that the interpretive centre was not a destination, it has become a popular stopping-off point in the region.

Economic impact:

The cumulative economic impact estimated for this site was \$2.7 million.

- The facility spent \$650,000 on operations in 2003 however, visitors who came to the centre in 2003 spent about \$1 million on accommodation, travel and food as well as other trip-related activities in Alberta.
- The economic impact from tourism in the province totals \$1.9 million.
- A total of \$830,000 in tax revenues is collected by the three levels of government (federal, provincial and local) on the operational and tourism impacts of the museum.
- As a result of this facility's operations and the tourism activity it attracts, 43 new full-time jobs were created throughout the province in 2003/04.





Oil Sands Discovery Centre

Description/mandate: The Oil Sands Discovery Centre features the history, science and technology of one of Alberta's major industries, the extraction of oil from tar sands. Visitors to the site can sit in the driver's seat of a 150-ton truck, and view "Cyrus," the bucketwheel extractor, one of Canada's largest land-based artifacts. There is a daily demonstration of oil sands extraction. The centre is Alberta's most northerly science centre. Its curriculum-based educational programs for schoolchildren reach four out of every five students in the region.

Following an intensive fundraising program and with support from corporate, government and private sources, the centre redeveloped its original exhibit hall which was out of date. The upgraded centre features interactive exhibits that reflect ongoing scientific research and advanced industrial processes. The team responsible for the renovation received a Premier's Award of Excellence in 2003.

Location: Fort McMurray **Land base:** 8.7 ha / 21.5 acres

Facility size: 2508 m² / 27,000 ft²

Opening date: 1985

Original capital cost: \$9 million for the building; \$15 million total assessed value with land holdings

Annual number of visitors: The site had about 31,300 visitors in 2003-04 and a 5-year average attendance of 27,000 visitors.

Visitor facts: In 2004, 36% of visitors were local; 30% were from outside Alberta.

Economic impact:

(currently individual economic impact estimate for the Centre is not available)

A key role of the Oil Sands Discovery
Centre is to act as an orientation centre and showroom for business tourists and visiting corporate executives. Hence, this invaluable contribution by the Oil Sands Discovery
Centre towards Alberta's economy would be difficult to assess in tangible financial terms.
Visiting delegations to Fort McMurray are often brought to the centre first to understand the geography, geology, history, and mining processes involved. Area oil sands companies have been good partners in the Centre's development.



Remington Carriage Museum

Description/mandate: The Remington Carriage Museum is North America's largest museum of horse-drawn transportation. Interpretive scenes put the vehicles into context, showing how they affected various facets of life during the 19th century. Guided tours reveal some of the fascinating stories associated with the vehicles. This museum has both a working stable and restoration shop. Carriage rides are available seasonally and special events are held annually.

Location: Cardston

Land base: 6.07 ha / 15 acres

Facility size: (approx.) 6,039 m² / 65,000 ft²

Opening date: 1992

Original capital cost: \$9 million **Annual number of visitors:**

Remington Carriage Museum had over 23,000 visitors in 2003-04; a 5-year average of 27,700

visitors.

Visitor facts: 51% of the visitors in 2004 were from outside Alberta; 90% were non-local.

Economic impact:

Cumulative economic impact was \$2 million in 2003.

• Visitors who came to the museum in 2003 spent \$510,000 on accommodation, travel and food as well as other trip-related activities in Alberta.

- Economic impact in the province from tourism totals over \$1.4 million
- A total of \$620,000 in estimated tax revenues is collected by the three levels of government (federal, provincial and local).
- As a result of this facility's operations and the tourism activity it attracts, 33 new full-time jobs were created throughout the province in 2003/04.



Provincial Archives of Alberta

Description/mandate: In the public's interest, the Provincial Archives of Alberta acquires, preserves and makes available for research private and government records of provincial historical and cultural significance. It also serves as the permanent repository of Alberta government records of permanent value. The Archives, which is in a sense the collective memory of Alberta, helps to give Albertans a sense of identity.

The collection includes manuscripts, records, books, plans, photographs, magnetic tapes (sound, film and video) and other materials. Specifically, there are over 40,000 linear metres of textual records, 89,000 maps, plans and drawings, 2,000,000 photos, 100,000 hours of sound, film and video, and 100 pieces of documentary art.

The new facility includes a reference and reading room, exhibit area, a library, a small conference centre, conservation laboratory, processing areas, staff offices and two floors of storage vaults. The Provincial Archives of Alberta is the only major archives in Canada to locate both its public reading room and all of its storage in one building.

Location: Edmonton **Land base:** 6 ha / 15 acres

Facility approx. size: $7,600 \text{ m}^2 / 80,000 \text{ ft.}^2$ (with a two-storey storage area and a two-storey conservation lab, the total space is $11,600 \text{ m}^2 / 118,000 \text{ ft.}^2$)

Opening date: New facility 2004; original facility 1962

Original capital cost: \$21 million **Annual number of visitors:** From April 1, 2003 to February 29, 2004, the Provincial Archives responded to approximately 9,500 research requests from the following clients:

- in-person researchers (approximately 4,900 requests)
- phone requests (3,300)
- researcher letters/faxes (300)
- researcher e-mails (1,000)

Visitor facts:

In the interests of protecting privacy, researchers who visit the Archives are not asked to identify their research interests. However, some of the main groups of visitors are believed to include internal government researchers, geneologists, lawyers and litigants, land claims researchers, Aboriginal



culture and spirituality researchers, the press/ media, students, academics and teachers, writers and publishers, filmmakers, search rights firms and other archives/archivists. These visitors are from all parts of Alberta, as well as from other provinces and outside the country.

Economic impact:

While not a stop for conventional tourists, there is a small, but growing, market internationally for genealogical research. More importantly, the Provincial Archives of Alberta is used to produce books and films, and is central to many litigations and land claims matters.



Other Facilities (main characteristics of the non-major sites)

	opening date	land base (approx.)	facility size (approx.)	capital cost	attendance 2003-04
Brooks Aqueduct	1989	19.1 ha.or 47acres	45m ²	\$0.15 million	3,400
Father Lacombe Chapel*	1981	.1 ha. or .825 acre	74m ²	\$0.1 million	2,900
Fort George & Buckingham House	1992	209 ha. or 516 acres	Centre: 457m²	\$1.4 million	1,900
Historic Dunvegan	1961	18 ha. or 45 acres	Historic Bldgs.: 477m² Centre: 390m²	\$3.3 million	9,700
Leitch Collieries	1983	5.6 ha. or 14 acres	182 m²	\$1.4 million	8,600
Rutherford House**	1973	.4 ha. or 1 acre	659 m ²	\$0.15 million	18,500
Stephansson House	1982	1.8 ha. or 4 acres	330 m ²	\$0.3 million	3,900
Turner Valley Gas Plant	under development	14.4 ha. or 36 acres	40,460 m ²	N/A	N/A
Tyrrell Field Station	1985	Dinosaur Provincial Park	812 m ²	\$2.5 million	12,000
Victoria Settlement	1981	5.3 ha. or 13 acres	309 m ²	\$0.3 million	4,100

^{*} Land leased from the Oblates of Mary Immaculate until 2081
** Land leased to Alberta Infrastructure from University of Alberta

Awards Received, 2000-2004



Ukrainian Cultural Heritage Village

The many awards won by Alberta's provincial heritage sites illustrate the province's strong leadership in the field.

Premier's Awards of Excellence, sponsored by the Government of Alberta

- Royal Tyrrell Museum: Pleistocene Gallery Redevelopment, 2000, Bronze; Advanced Ticket Management System, 2003, Bronze; ATCO Tyrrell Learning Centre Project, Gold, 2004
- Royal Alberta Museum: Wild Alberta Gallery, 2004,
 Bronze; Rise of the Black Dragon Exhibition, 2000, Silver;
 Anno Domini: Jesus through the Centuries Exhibition, 2001,
 Gold
- Oil Sands Discovery Centre: Exhibit Gallery Redevelopment, 2003, Silver

Attractions Canada Awards, sponsored by the media, private sector and Government of Canada

- Royal Tyrrell Museum: Best Indoor Attraction with an operating budget of greater than \$400,000, 2002
- Ukrainian Cultural Heritage Village: Best Outdoor Attraction with an operating budget of greater than \$1 million, 2002
- Remington Carriage Museum: Provincial Title for Best Indoor Attraction in Canada, with an operating budget of less than \$400,000, 2002

Provincial Communities in Bloom Awards (a national and provincial program of environmental awareness and municipal beautification)

 Ukrainian Cultural Heritage Village: "5 Bloom" Provincial Winner, 2002, 2003 and "5 Bloom" National Winner 2004

Other awards

Royal Alberta Museum

- The City of Edmonton Ambassadors Award for Outstanding Achievement for contributions to the tourism industry in Edmonton, 2000
- Alberta Motion Picture Industry Award (AMPIA) for "Jesus in the Age of Television" - Best Public Service Announcement and Best Educational Film, 2001

Reynolds-Alberta Museum

 David Thompson Tourism Award for Outstanding Contribution to tourism in central Alberta, 2003

Royal Tyrrell Museum

- People's Choice Award, Kidsware category, 2001
 Macromedia Awards, New York
- Alberta Teachers' Association "Friend of Public Education Award," 2003

Ukrainian Cultural Heritage Village

 Alberta Therapeutic Recreation Association, Northern Chapter, Special Award for On-site Driving Tours for Mobility Impaired Seniors Program, 2003 (Agency Citation Award 2003)

Oil Sands Discovery Centre

- Travel Alberta Alto Award for Tourism Excellence, 2001
- Multimedia Award from Petroleum History Society, 2003

In addition, various heritage facilities staff have received various external awards for their outstanding performance in areas such as customer service, management, research and education.

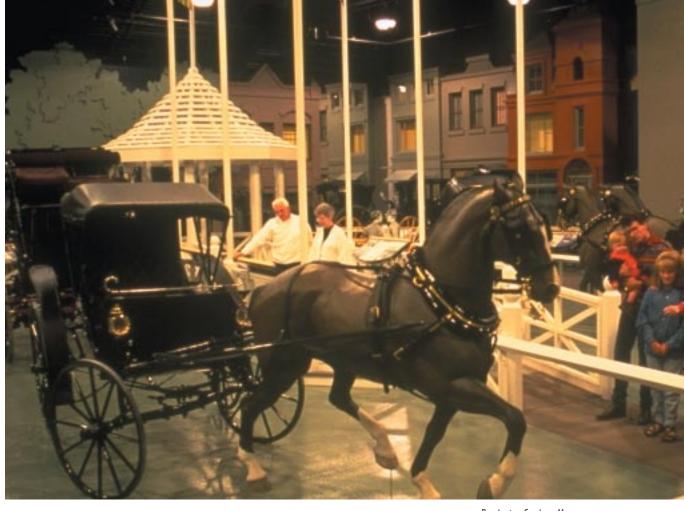


The Economic Impact of Alberta's Provincial Heritage Facilities

Alberta's provincial heritage facilities welcome one million visitors annually, and the resulting cumulative economic impact has been calculated at over \$70 million annually.

Provincial heritage facilities (museums, interpretive centres and historic sites) provide an excellent return on taxpayers' investment by generating new service sector revenues.

- Heritage facilities bring in "new money" by attracting visitors from outside the local communities. These visitors pay admission fees and make purchases in the gift shops and on-site food services areas. The visitors also spend money in the community, for example, buying gas, eating at local restaurants, staying in local accommodations, and buying souvenirs and supplies. The vast majority of visitor spending occurs off-site (79% in 2004).
- Heritage facilities hire staff and spend money on materials, utilities and insurance. The businesses that supply materials and services to heritage facilities also make various types of expenditures and purchases.
- All of this activity contributes directly or indirectly to the local and provincial economies and indirectly provides tax



Remington Carriage Museum

revenues to all three levels of government: federal, provincial and local.

- Return on the government's initial investment has been significant, generating profits within their associated regional service economies (direct and indirect returns).
- Alberta's heritage facilities operate efficiently and attract an active volunteer

corps along with substantial funding from the private sector. In some cases their core operational costs are less than the amount of money they bring in, either directly or indirectly – an outstanding achievement for an activity of this nature. The volunteer support for provincial heritage facilities is noteworthy: in 2003, a total of 1185 volunteers donated over 47,000 hours.



Royal Tyrrell Museum

Economic Impact of Provincial Facilities (2003)

site	visitor spending (millions)	jobs created*	(a) tax revenues (millions)	(b) tourism economic impact (millions)	(a&b) cumulated economic impact (millions)
Royal Tyrrell Museum	\$15.3	497	\$10.2	\$22.8	\$33.0
Royal Alberta Museum	\$1.5	238	\$4.2	\$9.5	\$13.7
Head-Smashed-In Buffalo Jump	\$2.8	87	\$1.8	\$4.1	\$5.9
Ukrainian Cultural Heritage Village	\$0.7	75	\$1.4	\$3.1	\$4.5
Reynolds-Alberta Museum	\$0.7	76	\$1.4	\$3.2	\$4.6
Frank Slide Interpretive Centre	\$0.9	43	\$0.8	\$1.9	\$2.7
Remington Carriage Museum	\$0.5	33	\$0.6	\$1.4	\$2.0
** Other provincial facilities	\$1.9	85	\$1.7	\$3.8	\$5.5
Total	\$24.3	1134	\$22.1	\$49.8	\$71.9

 $^{^{*}}$ These were new full-time jobs that were created throughout the province in 2003/04.

^{**} The other (10) provincial facilities included in the economic impact estimates are: Brooks Aqueduct, Father Lacombe Chapel, Fort George & Buckingham House, Stephansson House, Victoria Settlement, Oil Sands Discovery Centre, Historic Dunvegan, Rutherford House, Tyrrell Field Station and Leitch Collieries.



Data from the 2004 Visitor Survey 1

Number of visitors

On the average, over 708,000 independent visitors (excluding tour buses, school visits, seniors groups, etc.) visited the provincial heritage facilities between 2000 and 2004 annually.

Where the visitors are from

In 2004, 41% of the visitors came from outside the province: 28% from other provinces, 6% from the U.S. and 7% from countries other than the U.S. and Canada. Among the 59% of Albertans who visited the heritage facilities,18% lived in the local area (within 40 km), and 41% were from elsewhere in Alberta.

The only noticeable change from the previous year was an increase in the proportion of local visitors from Alberta (+1.0%) and a decrease in other Alberta visitors (-1.5%).

Age of visitors

About one-third of visitors to the heritage facilities are children under 18, mostly 7 to 17 years old. However, since 57% of the visitor parties in 2004 included at least one child, the percentage figures do not fully show the importance and influence of children as visitors i.e.:

• Parties including children with parents: 38%

• Parties including children with grandparents (usually a three-generation group): 19%

The age distribution of visitors surveyed in 2004:

Up to 6 years	13%
7-17 years	21%
18-34	16%
35-49 years	25%
50-64 years	15%
65+ years	10%

Purpose of the visit

Among non-local visitors, 32% made the trip to the area specifically to visit the facility or attend a special event being held there. This figure was the same in 2003 and increased significantly from 2002 (29%). Other popular reasons for the trip included a long vacation trip (20%), a short getaway or day trip (21%); visiting friends or relatives (13%) and showing visiting friends and relatives (11%).

Other data from the 2004 visitor survey

- Most local visitors were repeat visitors (84%) but half of the visitors (50%) were there for the first time.
- The majority of the visits occur during the summer months. Non-Albertans are more likely to visit in the summer.
- The average size of a visiting party was 4.2 people.
- The average time spent at a site was 2.4 hours for local people and 3.0 hours for non-locals (with an average length of stay in the



Head-Smashed-In Buffalo Jump

area of 1.3 nights). The total length of stay in Alberta by non-locals was 5.1 nights.

Data from a 2003 consultant's study of the economic impact of provincial heritage facilities

All heritage facilities

In 2003, Alberta's 17 provincial museums, historic sites and interpretive centres were responsible for an annual flow of \$42 million in expenditures in the province. The net economic impact of these expenditures was estimated at about \$50 million annually, representing a permanent increase in Alberta's annual Gross Provincial Income.

• Visitors to heritage facilities spent about \$24 million on food, accommodation and travel in Alberta.

- The facilities spent about \$18 million on their operations (includes expenditures of the Historic Resources Fund money spent on promotion, presentation and restoration); also utilities, labour, insurance.
- The facilities created over 1,100 new fulltime jobs throughout the province.
- Tax revenue derived in 2003: federal: \$13.2 million; provincial: \$6.6 million; local: \$2.3 million.
- Cumulative economic impact including tax revenue amounted to \$71.8 million.

Comparisons of major and small facilities

About (90%) of the independent visitors (excluding bus tours, seniors groups and school groups) in 2003 came to seven major facilities: Royal Tyrrell Museum,

Royal Alberta Museum, Head-Smashed-In Buffalo Jump, Reynolds-Alberta Museum, Ukrainian Cultural Heritage Village, Frank Slide Interpretive Centre and Remington Carriage Museum. Approximately 72,000 independent visitors came to the 10 other (smaller) facilities.

Since these major facilities attract the bulk of the visitors and have the largest number of employees, a large portion of the economic returns (93%) also came from them.

In 2003, the net economic impact from tourism by major heritage facilities was estimated to exceed \$46 million annually.

- Visitors to the major facilities spent about \$22.4 million on food, accommodation and travel in Alberta in 2003.
- The major facilities spent about \$16 million on their operations.
- The major facilities created over 1,000 permanent full-time equivalent jobs.
- Tax revenue derived in 2003 from the major facilities: federal; \$12.2 million; provincial; \$6.1 million; local; \$2.1 million.

Alberta Community Development, Heritage Facilities Visitor Survey Report for 2004. All survey figures provided are for 2004 unless otherwise specified.

² Econometric Research Limited, Economic Impact of the Provincial Heritage Facilities in Alberta 2003. December, 2004.



Volunteer Contributions

According to Statistics Canada's 2000 National Survey of Giving, Volunteering and Participating, 39% of Albertans volunteered their time. This was the second highest rate of volunteerism in the country. Although volunteering opportunities are not considered true employment, they generate indirect economic impact in a subtle manner.

For Alberta's provincial heritage facilities, annually there are over 1,100 volunteers contributing approximately 47,000 hours of their time to various types of activities that range from one-time only, to short and long-term projects as well as regular duties, for museums, historic sites, interpretive centers and the Provincial Archives. These activities involve volunteers in fundraising, educational or curatorial programs, welcoming visitors, office administration, laboratory assistance, field projects, interpreting exhibits, special events, research, artifact collection storage, repairs and maintenance, etc.







Appendix

Sources of Data: Visitor Survey and Consultant's Report

Alberta's innovative and effective approaches to the operation of heritage facilities are being recognized and used as models in other jurisdictions in Canada. Alberta Community Development uses two major tools to collect and interpret information about the impact of provincial heritage facilities: a visitor survey and a consultant's analysis. These tools provide the ministry with results of performance measures such as customer satisfaction, knowledge gained by visitors, and the amount of revenue generated by tourism and tax revenues. The ministry uses the information collected through these initiatives to continually improve the facilities' operations and services, such as, building amenities, marketing, interpretive programming and economic planning.

Visitor Survey

Since the early 1980s, Alberta Community Development has been conducting annual visitor surveys for all of the provincially owned and operated heritage facilities. The survey questionnaire (copies available on request) yields valuable information about whom the visitors are and what they wish to see, as well as how much money they spend.

The surveys involve a random sample of visitors each year (5884 in 2004). For the past year the visitor survey has been

coordinated and results analysed by Infact Research and Consulting, Inc.

The ministry hires university students to help with surveying in each summer. The survey days are randomly selected to ensure that measures are taken on long weekends, weekends and weekdays, and on dates with or without special events. The surveys are also done at different times of day, generally late in the visit.

This survey, which is among the most extensive of its kind in Canada, is the core of the Cultural Facilities and Historical Resources Division's annual performance measures. Alberta Community Development incorporates the survey results into its business plans and annual reports, and communicates them to interested stakeholders. The ministry reviews the survey questions and methods annually, even after a decade of application.

In 1998, Alberta Community Development determined that, except for bus tours, which include non-Alberta residents, the majority of group tours originating in Alberta have a small direct and incremental economic impact. Consequently, the department began using the questionnaire to survey only "independent visitors", that is, visitors who are not part of a bus tour, school group, seniors group or other scheduled group visits. Therefore, the results of this survey cannot be

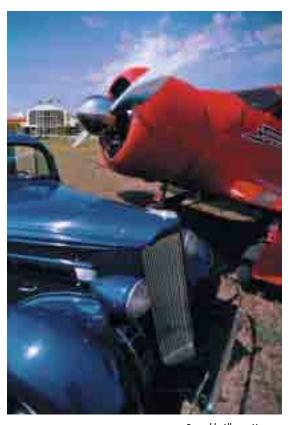
extended to groups. In 2003-4, independent visitors represented an average of 76% of total attendence to all provincial facilities.

Consultant's Study/ Economic Impact Model

In partnership with Alberta Economic Development, Alberta Community Development also contracts with Econometric Research Limited to apply the data collected by the visitor surveys and translate that into a model of the economic impact of the facilities. This process started in the early 1980s when the data from the visitor surveys was interpreted using a Parks Canada model.

The report on the 2003 data is based on a special application of a generic model (DEIM: Alberta) that has been used previously to generate information about the economic impact of Niagara Falls, West Edmonton Mall and several tourism projects identified by Alberta Economic Development.

The consultant's study also utilizes a large set of economic and technical databases that are regularly published by Statistics Canada, such as interprovincial input-output tables, the employment sector, taxes by type of tax and the level of government collecting it, prices of products, and energy used in physical and energy units.



Reynolds-Alberta Museum

For More Information

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"As a taxpayer it is wonderful to see our tax dollars so wisely spent."

visitor to Royal Alberta Museun

"Wow! Thank you,
Alberta!"

visitor to Reynolds-Alberta Museum