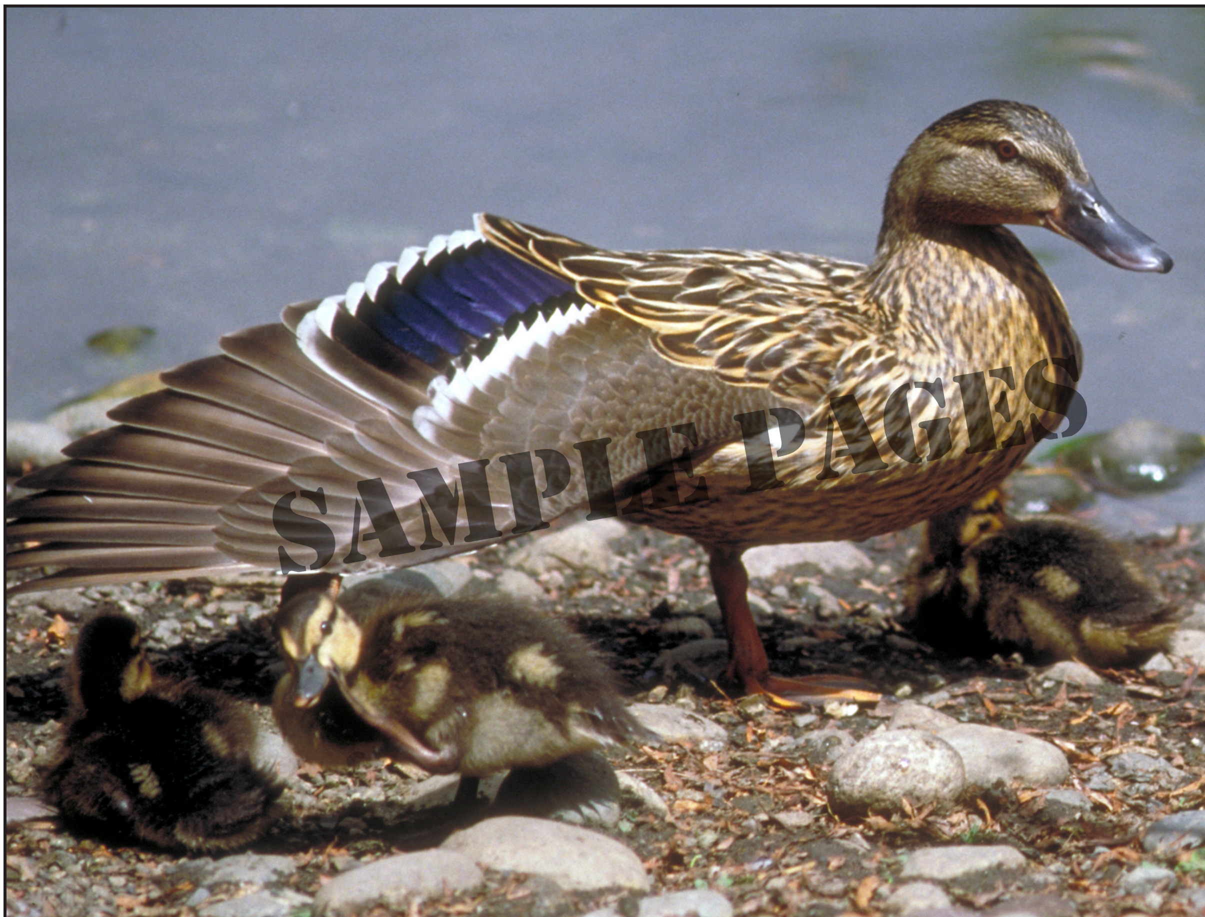
Chapter 4

Market Review

for the

Beaver Hills HA Development Plan



Using This Chapter

HA Field Staff

HA field staff can use this chapter to identify key target markets and local trends when developing HA services. This is the first time that an overview of markets available to HA in the area has been provided.

HA Head Office Staff and PPA Regional Staff

Managers and planners can use this chapter as an introduction to current and future population trends in the Beaver Hills area.

Chapter 4
Market Review

Contents: Chapter 4 Market Review

Chapter 4
Market Review

Beaver Hills
Heritage Appreciation Development Plan

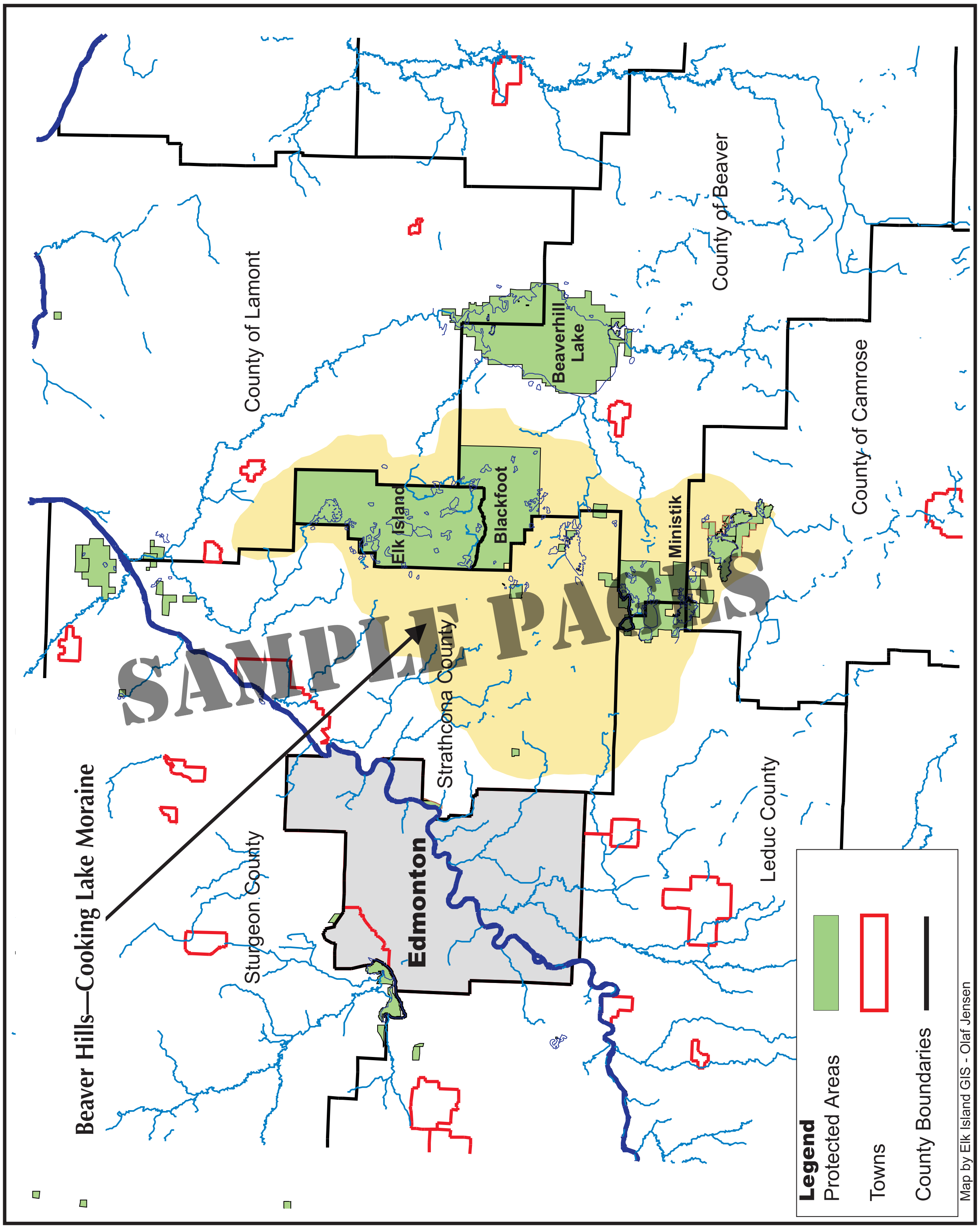


Figure 4.1
Political Boundaries

Chapter 4
Market Review

Introduction

This chapter is a brief overview of the markets available to HA in the Beaver Hills. It looks at the key market areas of Edmonton and the five counties that intersect on the Beaver Hills. As well, the Edmonton tourist market and the school markets are discussed.

Information Sources

To date, no market analysis has been conducted for HA in the Beaver Hills. This review looks at existing information from Statistics Canada (based on 2001 census data) and a presentation on Edmonton demographics and population trends presented to Parks and Protected Areas by Rod Keith in 2003. Information on market trends comes mostly from *Market Assessment and Visitor Projections for Cypress Hills Interprovincial Park, Dinosaur Provincial Park and Writing on Stone Provincial Park* prepared by Western Management Consultants in 2003.

Markets

Key Markets

The following markets are discussed:

- potential visitors from
  - Edmonton
  - Strathcona County
  - Beaver County
  - Lamont County
  - Leduc County
  - Camrose County
- local schools
- tourists
  - from Alberta
  - from the rest of Canada
  - from the USA
  - international

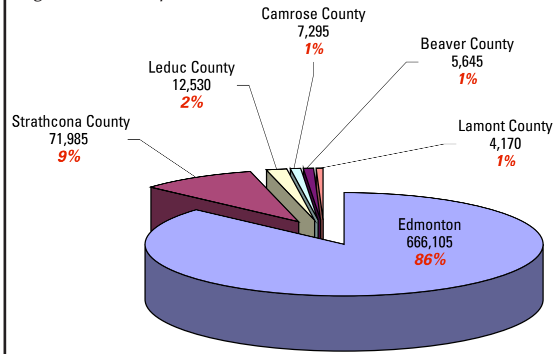
A review of other agencies working in the area and an analysis of partnership opportunities will be covered in the Partnership Analysis chapter.

Potential Visitors

Population Size

The nearby population sources that can easily access the Beaver Hills are shown below.

Figure 4.2: Population: Edmonton and Counties



Edmonton is by far the largest market, representing 666,105 people or 86% of the local visitor market.

Strathcona county is the second largest market, representing 71,985 people or approximately 9% of the market.

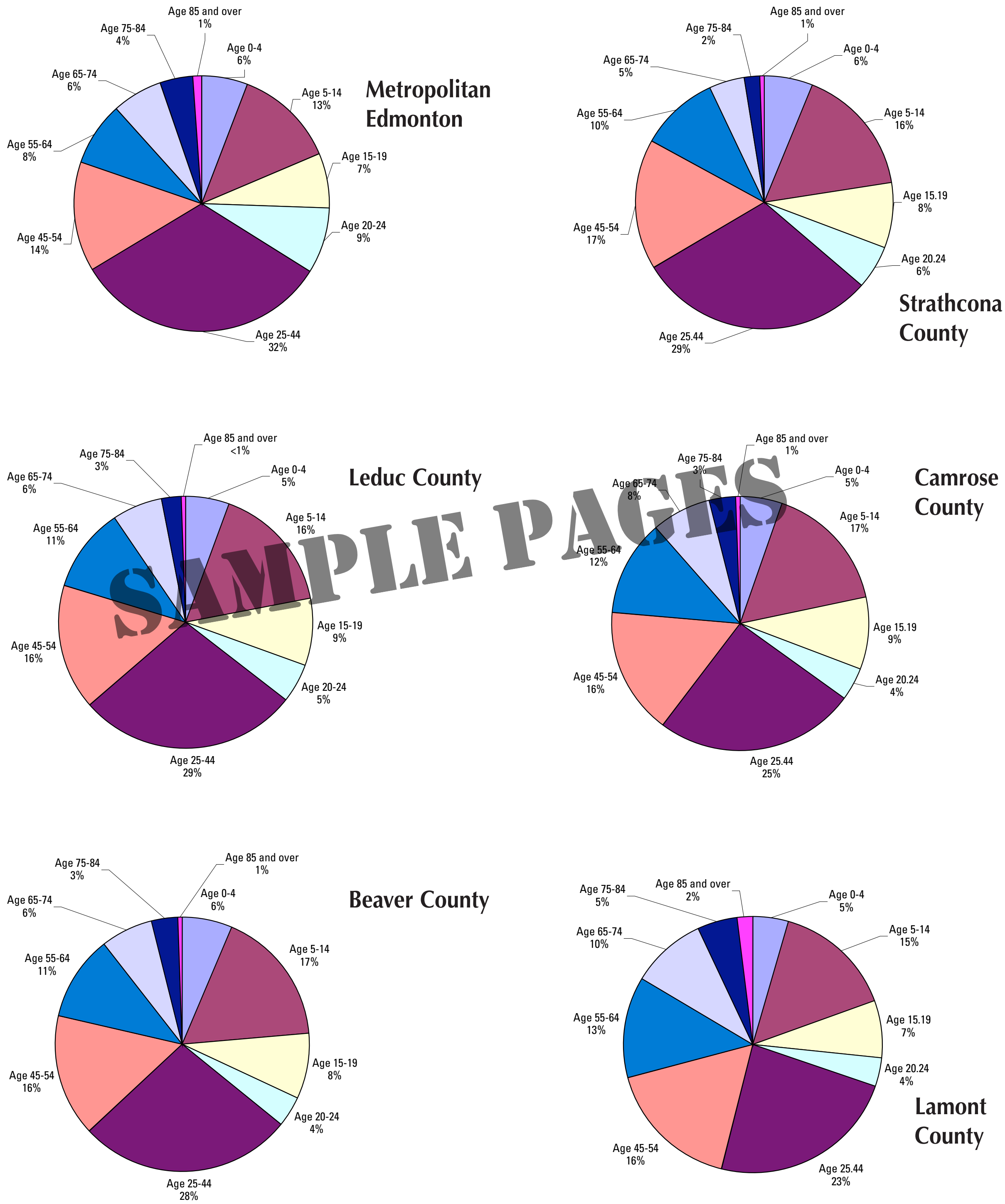
The counties of Leduc, Camrose, Beaver and Lamont together account for about five percent of the nearby population.

Implications:
It is clear that the dominant market for local visitors is Edmonton. There are many other factors to take into account when developing a marketing plan.

Population Structure

Population structure is a way of describing how the people are divided into age groups the numbers of each group. Understanding this structure gives HA staff a better insight into the potential audiences and users of HA services and programs. For example, seniors are generally interested in longer programs and activities than families with small children. When you know the size of your potential audience groups, HA staff can make strategic decisions about the amount of effort they will put into development, promotion and delivery of targeted services.

Figure 4.3: Demographics of the Main Market Areas



Chapter 4
Market Review

Edmonton
The population of Alberta's capital city has a noticably younger population structure than the five counties that surround the Beaver Hills. Edmonton has the largest percentage of people between the ages of 20 and 44 and a generally a lower percentage of people 45 and older.

The Five Counties
In general the population structure of all five counties is similar.

The largest group is age 25–44 with a range from 23% in Lamont County to 29% in Leduc County.

Tied for second place are :

- ages 5–14   14–17%
- ages 45–54   14–17%

All market areas have a large percentage of people that make up traditional markets for HA services; adults of child-bearing age (ages 25–54) which account for between 44–47 % of the population of the city of Edmonton, and Strathcona, Leduc and Beaver counties. The counties of Camrose and Lamont are slightly lower at 41 and 39% respectively. Baby Boomers (age 39–58) are a still a major component of the population though the Statistics Canada groupings don't allow for precise measurements of this group.

Lamont County differs from all its neighbours. It has a significantly larger older population with 30% of its population between 55 and over 84 year compared to about 18–24% for the other areas.

Implications
The markets have ample people that are typical users of HA services.

Income
Figure 4.4 shows the median income of all people earning money aged fifteen and older.

Strathcona County, as was expected, has the highest median income, well above the provincial average. This county has a large number of well-to-do acreage owners who have moved out of the city to enjoy life in the country. Many are horse-owners, giving this area one of Canada's highest populations of horses.

Leduc County is in second place, again with a mean just below the provincial average.

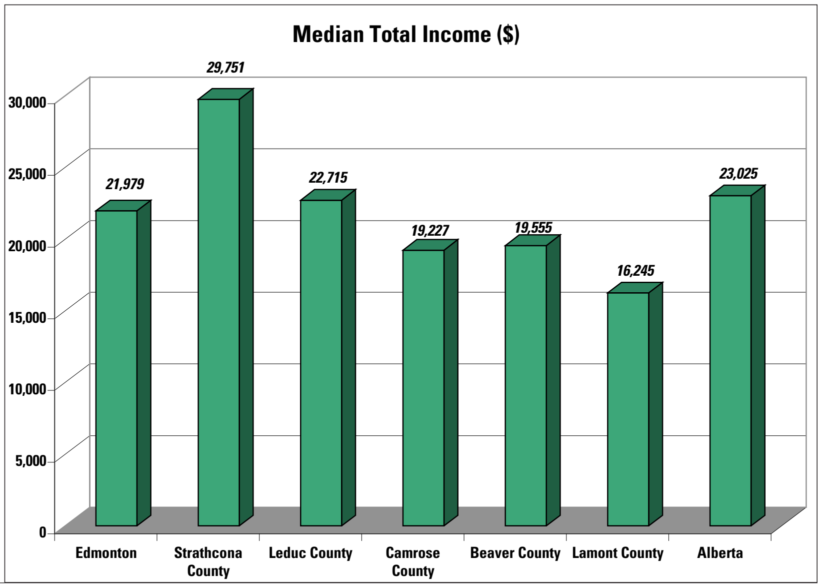
Edmonton is third with a mean that matches the provincial average.

Finally, Beaver, Camrose and Lamont counties have mean incomes well below the provincial average.

Implications:
Traditional users of HA services tend to be people with middle and high incomes. Strathcona and Leduc counties plus Edmonton have the highest median incomes and they represent the largest populations centres. We expect that these three areas will be the largest markets for traditional HA services.

The counties of counties of Camrose, Beaver and Lamont have lower mean incomes and may have fewer people interested in traditional HA services. However, the new mandate of PPA as set out in the HA Revitalization Plan places increased emphasis on providing services to people who do not normally visit parks and protected areas. More study may be needed to develop a profile of these markets.

Figure 4.4: Median income by location



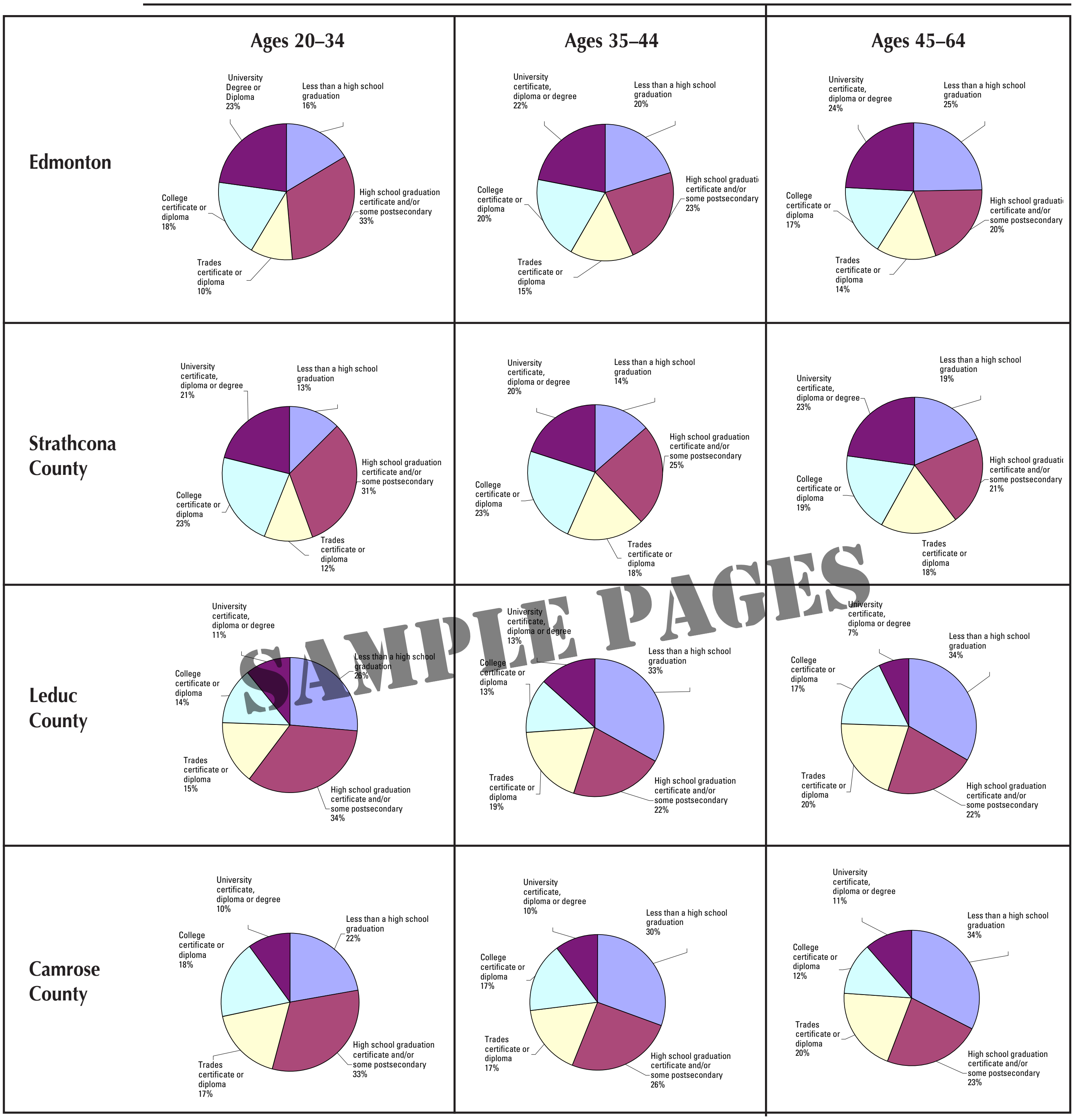


Figure 4.5: Education levels in the six market areas.

Figure 4.5: Continued

Education

Figure 4.5 shows the education levels for people in the six market areas. People living in Edmonton and the five counties are divided into three age groups:

- age 20–34
- age 35–44
- age 45–64

Edmonton

Edmonton has a relatively well educated population with at least 41% of the population in all three age groups with a college or university education and a range from 10 to 15% with a trade school education.

The percentage of people who have finished high school in the city ranges from 33% in the 20–34 age group, to 23 and 20% for the older groups. This range is similar to all the other markets except Lamont County.

This city has a moderate number of people who have not finished high school ranging from 16% in the age 25–34 group to 25% in the 45–64 age group.

Strathcona County

This county has the largest population of highly educated people, slightly higher than in Edmonton. Strathcona has between 44 and 42 % of its population with either a college or university education and up to 18% with training in trades.

Strathcona County has a similar range of high school graduates to the other groups but also has the smallest percentage of people who have not completed their high school education. Only 13% of the age group 25–34 have not completed high school as did 19% ages 45–64.

Leduc County

Compared to Edmonton and Strathcona County, this county has a significantly lower percentage of people with college and university degrees (the combined college and university graduate population is about 25% across the three age groups). However Leduc County has more people with trade certificates (between 15 and 20% of workers).

This county, compared to Edmonton and Strathcona County, has the larger percentage of people who have not completed high school (between 26 and 34%).

Discussion

Educational background has little to do with the intelligence of participants or their interest in HA topics and services. Level of education does have significant importance to the prior knowledge of participants (e.g., where does the HA programmer begin? At the basics, at a high level, or somewhere in between). It may also influence the complexity of language used in HA offerings. It is vital for HA service providers to understand their audience's educational background when developing effective HA services and products.

The 2001 statistics show that there is a wide variation in the educational background of people living in the market areas. Strathcona County and Edmonton have the highest percentage of people with higher education and the lowest percentage of people with less education. Meanwhile there are some age groups in the smaller counties with significantly lower amount of higher education.

Also, the populations of some of the counties that encompass the Beaver Hills are rapidly growing. The dynamics and composition of those counties closest to Edmonton; Strathcona, Leduc and perhaps Camrose, are likely to change as more people move into them to try out country living.

Implications:

- HA staff will have to pay close attention to the origins of participants in HA programs to understand their educational backgrounds and develop services that are appropriate and effective
  - this may require visitor and participant surveys and keeping participant stats
- extension and out-reach programs aimed at participants in particular counties should be engineered to fit the profiles of that county audience
- advertising and promotion to communities about special events and regular services may have to be tailored to each community's profile

Edmonton Tourist Demographics 2001

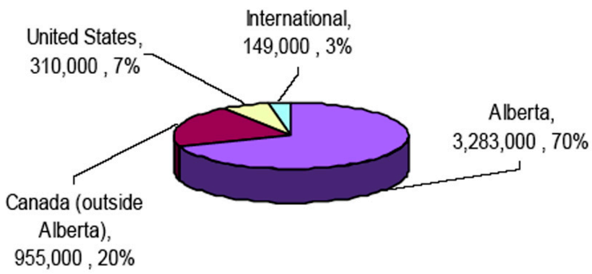
A significant potential market for HA services in the Beaver Hills region is tourists who come to Edmonton. The information below comes from Edmonton's *2001 Visitor Demographics* (www.tourism.ede.org/ media/ 2001 _Visitor_ Demographics.pdf), a report based on data compiled from "Tourism in Canadian Cities: A Statistical Outlook" prepared by Statistics Canada.

Key points of the report include:

How Many People Visit Edmonton?

- in 2001, Edmonton CMA (Census Metropolitan Area) received 4.7 million visitors
  - five times more visitors than its population base of 937,845
  - of six major Canadian metropolitan cities, Edmonton had the highest visitor to population ratio

Figure 4.7: Where Do They Come From?



Top 5 Origins of Visitors to Edmonton Area 2001

Rating	Alberta	Canada (outside Alberta)	United States	Inter-national
1	Central Alberta *(1,862,000)*	British Columbia *(457,000)*	California *(47,000)*	United Kingdom *(26,000)*
2	Calgary and Area *(821,000)*	Saskat-chewan *(249,000)*	Washington *(35,000)*	Germany *(17,000)*
3	Alberta's North *(373,000)*	Ontario *(131,000)*	Texas *(18,000)*	Japan *(15,000)*
4	Edmonton and Area *(122,000)*	Manitoba *(83,000)*	Colorado *(17,000)*	Taiwan *(13,000)*
5	Alberta's South *(94,000)*	Quebec *(19,000)*	Minnesota *(15,000)*	Australia *(9,000)*

Discussion

Edmonton's major tourist business comes from other Albertans. Canadians from other provinces accounts for the second largest group. Together they represent 90% of Edmonton's tourist market.

Americans and other international visitors account for only 10% of the market.

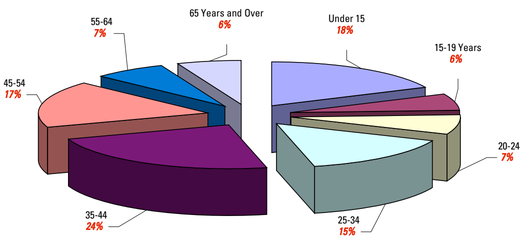
Implications

HA services for tourists should focus primarily on Canadians, the largest market.

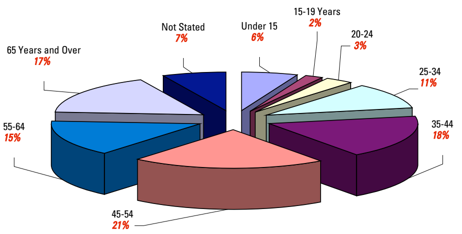
Effort put toward HA services targeting American and international tourist should be small, reflecting the size of this market.

Beaver Hills
Heritage Appreciation Development Plan

Age Distribution: Visitors to Edmonton from Canada



Age Distribution: Visitors to Edmonton from USA



Age Distribution: International Visitors to Edmonton

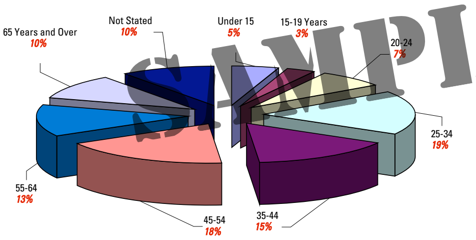


Figure 4.8:
Age distribution of visitors to Edmonton

Age Distribution

The age distribution of tourists coming to Edmonton in 2001 is shown in the following table and figures.

Age Distribution of Visitors to Edmonton Area - 2001			
Age	Origin of Visitor		
	Canada	USA	International
Under 15	18%	6%	5%
15–19 Years	6%	2%	3%
20–24	7%	3%	7%
25–34	15%	11%	18%
35–44	23%	18%	15%
45–54	17%	21%	18%
55–64	7%	15%	13%
65 Years and Over	6%	17%	10%
Not Stated	0%	7%	10%

Discussion
Children (0–19 years) are an important segment of the Canadian tourist population (24%). They are not a large group in American (8%) or international (8%) tourists.

Baby boomers are the largest percentage for all three groups.

Seniors represent a significant number (17%) of American visitors, while they are less common in the Canadian and international populations.

Implications
Family-focused and child-focused HA services will work well only for Canadian tourists; however, there is little market for these services for American and international tourists. HA services focusing on baby boomer and senior adults will be more appropriate for these.

Chapter 4
Market Review

What Are They Doing?

The most common reason for visiting Edmonton was stated as pleasure. Key activities include:

- Klondike Days had the greatest attendance of the festivals
- West Edmonton mall was the most visited attraction

The following tables provide more information on these pleasure activities.

Primary Visitor Activities While in the Edmonton Area 2001

Activities	Origin of Visitor		
	Canada	USA	International
Visiting Friends and Relatives	31%	10%	10%
Shopping	20%	18%	14%
Other Activities	49%	72%	76%

Breakdown of Other Visitor Activities While in the Edmonton Area 2001

Other Activities	Origin of Visitor		
	Canada	USA	International
Attended Cultural Events	3%	2%	3%
Attended Festivals/Fairs	3%	3%	4%
Attended Sports Events	7%	3%	3%
Sightseeing	14%	18%	18%
Nightlife/ Casino	12%	13%	9%
Sports/Outdoor Activities	18%	8%	7%
Visit a National/ Provincial Park	4%	12%	14%
Visit a Theme Park	9%	6%	8%
Visit a Zoo/ Aquarium/ Botanic Garden	6%	5%	7%
Visit a Museum or Art Gallery	4%	9%	10%
Visit a Historic Site	4%	11%	11%

Discussion

Shopping and visiting friends and family represent just over half of the activities of Canadian tourists. They spend the other half of their time on a variety of activities, many of which are HA-related. Their key activities include:

- outdoor activities
- sight seeing

A small proportion visit national and provincial parks (4%) and historic sites (4%).

American and international tourists spend significantly more of their time taking in the local sites, activities and attractions. Key activities include:

- sight seeing
- visit a national or provincial park
- visit a historic site
- visit a museum

Smaller numbers (7–8%) take part in outdoor activities.

Implications

Tourists are interested in HA-related activities. There will be more interest by American and international visitors in services related to the cultural and natural history of the area.

Canadian tourists will be interested in these to a lesser degree. However, they will be more receptive to outdoor activities and recreational opportunities.

- visitors spent $997 million in the Edmonton area in 2001
  - greatest expenditure was on retail and other costs, followed by food and beverage, accommodation, transportation and recreation/entertainment

When Do They Come?

Albertan tend to visit more regularly throughout the year than tourists from other parts of Canada, the USA and other international locations (see Figure 4.10 below). The peak vising time for Albertans is April, May and June (2nd Quarter).

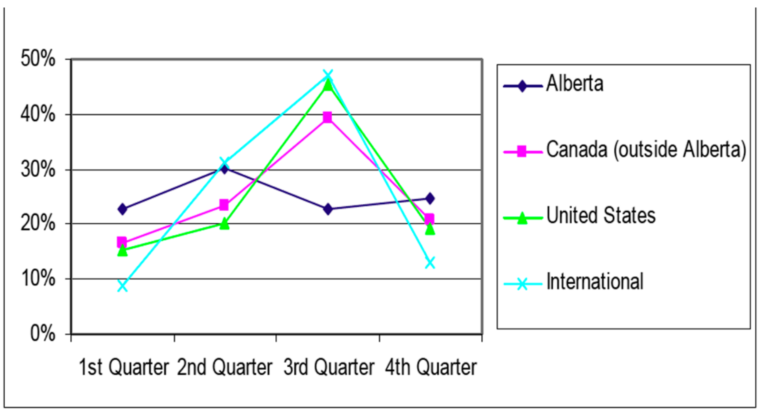
The peak visitation for all other tourists is the summer—July and August 3rd Quarter).

Implications

Since Albertans are by far the largest tourist population (70% of the total), HA services targeting tourists should be provided year-round if provided at all. As many are visiting friends and family, separate program offerings are probably not appropriate.

Tourist activity from the rest of Canada, the USA and other international locations should focus on the summer. Effort on providing HA services for this group should reflect its size (30% of tourists).

Figure 4.10:
Seasonality by origin of visitors to Edmonton



Conclusions

1. The Edmonton tourist market is small.
   - HA services directed at this market should reflect its size
2. The vast majority of visitors to Edmonton are from Alberta.
   - HA services directed at this market should reflect this
3. The majority of visitors to Edmonton stay at the homes of friends and family.
   - promotion of HA services for tourists should be focused on Edmontonians
     - Beaver Hills are wild and safe and in your back yard
     - its a great place to take visitors to give them a taste of *Natural Alberta*
4. HA services for Albertan and Canadian tourists should have a major focus on activities that can be done outdoors
   - hiking
   - cross-country skiing
   - snowshoeing
   - bird watching
   - wildlife watching
   - horse riding
5. HA services directed at American and international tourists, if provided, should focus on natural and cultural history of the area and answer the question: *What is special about this place?*

The Future

Market Trends

In 2003, Western Management Consultants delivered a report: *Market Assessment And Visitor Projections: Cypress Hills Interprovincial Park, Dinosaur Provincial Park, Writing-On-Stone Provincial Park.* The report included an discussion of the major tourism trends that will affect Alberta up to 2020. Much of their information is relevant to the HA services in the Beaver Hills.

Trends Influencing Alberta's Parks

Introduction

Western Management Consultants (2003) forecasted major tourism trends in Alberta for the future up to 2020. In developing these forecasts for the next 20 years they looked at:

- megatrends relevant to parks
- demographic trends that will influence park visitation
- growth expectations in major target market segments in the near term … from 2002 to 2005
- recreation and tourism trends and markets relevant to parks
- the heritage interest market, best matched to parks
- the camping market
- societal trends influencing parks

Chapter 4
Market Review

North American MegaTrends

Shifting Age Structure
Key findings include:

- median age of Canadians will increase from 35 years of age to:
  - almost 39 years by 2011
  - 43.6 years by 2026

Baby Boomers
Baby boomers are a demographic wave that is influencing park visitation and interpretation. According to Western Management Consultants (2003) the baby boom generation is becoming a group of empty nesters. Their children will be grown up and will have left home. Boomers "are educated, sophisticated, experienced traveler who are used to a lifetime of getting what they want."

Boomer Facts

- boomers between 45–54 and 55–64 years are the most likely to travel outside of North America
  - competition for their interest will be significant
- by 2011 the boomers will number 10.2 million in Canada
- 1/3 of Canada's population are baby boomers
- 2000–2011 the early boomer generation (55–64 year olds) will expand by 77%
- 2011, the age group of 45–64 year olds will number 10.2 million, up 6.4 million from today
- 2026–the 65+ segment of the population will be 21% of Canada's population
- 2016 marks the time when the trailing edge of the baby boom reaches age 65
  - will represent 34% of family households
  - boomers will move from the young-family part of their lives to becoming empty nesters -mortgage-free, and kid-free, this group will be looking for travel and adventure opportunities

Projected population growth, and the baby boom cohort of Alberta's population is represented in the following table:

Note that in one scenario described by Western Management Consultants there are almost one million boomers in Alberta, representing almost 30% of the province's population, peaking in 2005.

Figure 4.11:
Baby Boom Cohort And Alberta Population, 2000-2020, Selected Years
from Western Management Consultants (2003)

	2000	2005	2010	2015	2020*
Age of Boomers	35-55 yrs	40-60 yrs	45-65 yrs	50-70 yrs	55-75 yrs
Baby Boomers (born in 1947-1966) at Medium Projection	951,110	959,580	952,520	930,180	906,060
Total Alberta Population at Medium Projection	3,051,345	3,274,355	3,465,230	3,630,050	3,775,252
Growth in Alberta Population at Medium Projection		223,010	190,875	164,820	145,202
Percentage Growth in Alberta Population at Medium Projection		7.31%	5.83%	4.76%	4.0%
Percentage Boomer Cohort of Total Alberta Population at Medium Projection	31.2%	29.3%	27.5%	25.6%	24.0%
Baby Boomers (born 1947-1966) at High Projection	951,635	960,525	953,650	931,540	900,391
Total Alberta Population at High Projection	3,055,595	3,284,250	3,481,045	3,650,925	3,815,217

Chapter 4
Market Review

School Markets

HA staff in the Beaver Hills area are keen to further develop services for schools in the region. The following is a review of the local education market.

School Districts and Divisions

Schools in Edmonton

Edmonton Public School Division No. 7
This is the area's largest school division and may represent the major market for PPA-based education programs and services.

Key statisitcs as of the 2003–2004 year include:

- Student Enrollment: 82,154
- Total number of Schools: 202
- Elementary: 132
- Elementary Junior High Schools: 20
- Elementary, Junior and Senior High Schools: 7
- Junior High Schools: 28
- Junior and Senior High Schools: 3
- Senior High Schools: 12
- Other Schools: 23

Appendix 4.1 lists the public schools of Division No. 7

Edmonton Catholic School Division No. 7
This is the area's second largest school division and represents a major market for PPA-based education programs and services.

Key statisitcs as of the 2003–2004 year include:

- Student Enrollment: 30,974
- Total number of Schools: 91
- Elementary: 52
- Elementary Junior High Schools: 11
- Elementary, Junior and Senior High Schools: 1
- Junior High Schools: 12
- Junior and Senior High Schools: 3
- Senior High Schools: 12

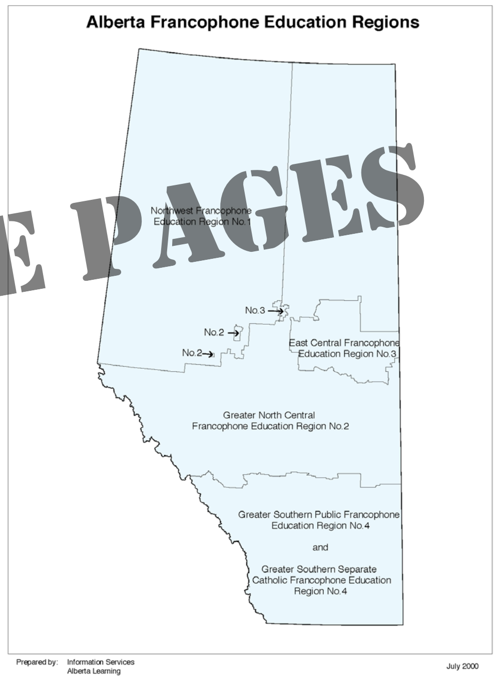
Appendix 4.1 lists the catholic schools of Division No. 7

Charter Schools
Edmonton has three charter schools:

- Aurora School Ltd. K-9
- Boyle Street Education Centre (ages 14–19)
- Suzuki Charter School Society (1–6)

Greater North Central Francophone Education Region No. 2
The region has five schools in Edmonton:

- Ecole publique Gabrielle-Roy
- Ecole Maurice-Lavallée
- Ecole Notre-Dame
- Ecole Père-Lacombe
- Ecole Sainte-Jeanne-d'Arc



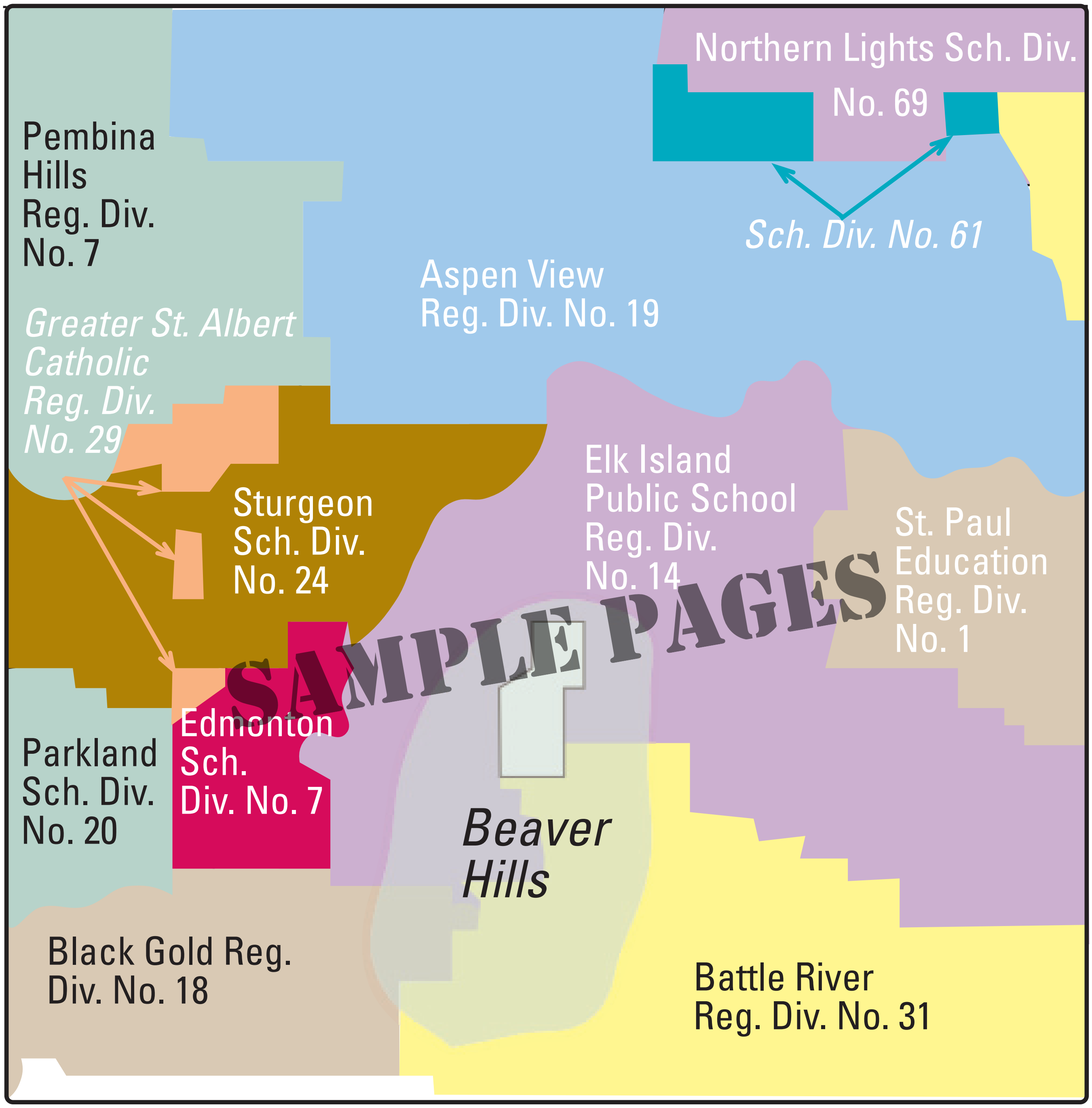


Figure 4.12: Public School Divisions in the Beaver Hills Region

Chapter 4
Market Review

Schools Outside Edmonton

The region surrounding the Beaver Hills has two regional public school divisions and two catholic school divisions. Each is discussed below.

Elk Island Public School Reg. Div. No 14

EIPS is Alberta's fifth largest school jurisdiction. It covers some of the lands of the Beaver Hills and the area that surrounds it (see map on facing page). Key statistics as of the 2003–2004 year include:

- Student Enrollment: 16,200
- Total number of Schools: 44
- Sherwood Park 17
- Rural Strathcona County 8
- Lamont County 6
- Fort Saskatchewan 8
- Minburn County 5
- Elementary: 20
- Elementary Junior High Schools: 5
- Elementary, Junior and Senior High Schools: 5
- Junior High Schools: 5
- Junior and Senior High Schools: 2
- Senior High Schools: 5
- Other Schools: 2

Schools range in size from 30 students to approximately 1,200.

Elk Island Catholic Separate Regional Division #41

EICS serves over 5,600 students in 15 schools across central Alberta, serving communities in the cities of Sherwood Park, Fort Saskatchewan, Camrose and Vegreville.

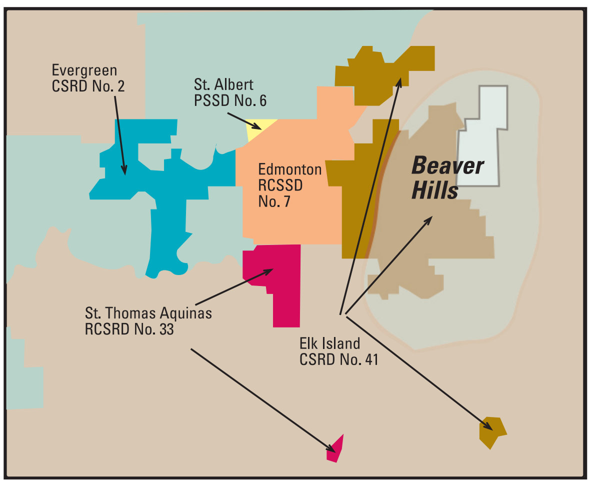


Figure 4.13:
Catholic School Divisions in the Beaver Hills Region

Battle River Regional Division #31

Battle River Regional Division #31 serves approximately 7,700 students (2,000 in the town of Camrose) in 37 schools (including Hutterite Colony Schools, three Outreach Schools, and one Virtual School). The majority of students come from farms, acreages, villages and small towns in a predominantly rural setting.

Schools in the City Of Camrose

K-6
- Chester Ronning
- Jack Stuart
- Sifton
- Sparling

7–9
- Charlie Killam grades

9–12
- Camrose Composite High School

Other
- Battle River Online
  - Grades 7 to 12 access courses and interact with teachers and classmates via the Internet
- Home Education K–12
- PACE Outreach 10–12

Schools in the County of Camrose

- Bashaw 1–12
- Bawlf K–12
- Camrose Colony 1–9 Hutterite Colony School
- Edberg 1–8
- Hay Lakes 1–12
- New Norway 1–12
- Rosalind K–6
- Round Hill 1–9

Schools in the County of Beaver

- Holden K–6
- North Star Outreach 10–12
- Ryley 7–12
- C.W. Sears 1–9
- Tofield 5–12
- Viking K–12

Hutterite Colony Schools
- Holden Colony 1–9
- Iron Creek Colony K–9
- Tofield Colony 1–9
- Viking Colony 1–9

Analysis of School Data

Figure 4.14 shows that Edmonton represents the lion's share of the education market. Together, Edmonton public and catholic schools teach 75% (over 113,000 students) of the region's students. It is likely that the Edmonton percentage will be slightly higher since numbers for the city's francophone and charter schools were not available.

The second largest market is the Elk Island public and catholic school divisions. These two represent 15% of the regional market or approximately 22,000 students.

The remaining 10% of the market is made up of two regional school divisions, Black Gold and Battle River, each holding approximately 5% of the region's students.

Predictions of Market Growth

Western Management Consultants (2003) indicate that the province's birth rate will continue to decline over the next ten years. However, this will be offset by continued immigration of families to Alberta. They predict that overall, the numbers of school-aged youth will remain the same as present—the market in terms of numbers will remain the same.

However, other local trends will likely affect the education market in the Beaver Hills region. For example, the main areas of growth in Canada have been and are expected to continue to be in cities. Edmonton, the province's capital is likely to continue to grow at above the provincial average. As well, the Beaver Hills region is a popular location for development of acerage lots where people try out country living. Demand for this type of development is likely to continue over the next ten years. This type of growth may be regulated at varying degrees by the five counties of the Beaver Hills. The Beaverhills Initiative for developing a sustainable region and others may strongly effect the type of development that takes place in the region.

As a result, it is difficult to accurately predict population trends in the area. However, at the time of writing, it would be relatively safe to predict that school populations in the region are not likely to decline.

Strategic Approaches

The Edmonton Market

As stated before, the Edmonton market is by far the largest. Education initiatives toward Edmonton schools should reflect its size and importance.

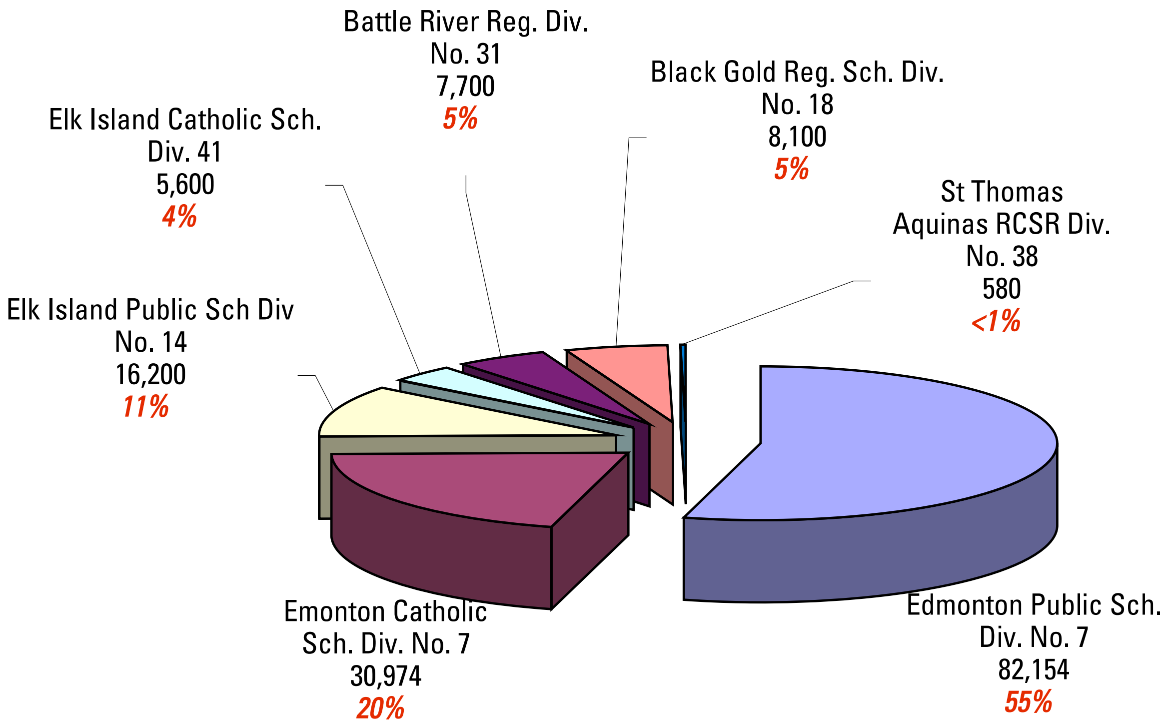


Figure 4.14: Student population by school divisions

Appendix: 4.1
Schools in the Region

Edmonton Charter Schools

Aurora School Ltd. **Charter K–9**
(780)930–5598 (780)930–5502
Email: aurorasc@telusplanet.net
Website: www.auroraschool.com

Boyle Street Education Centre **Age 14–19 Charter**
(780)425–2205 (780)424–4106 Email: DTremblay@boylestco-op.org
Website: www.boylestreetschool.org
10116–105 Avenue Lower Level Edmonton, AB T5H 0K2

New Horizons Charter School Society Charter K–9
Gifted Students
(780)417–1786 (780)467–6409
Email: administration@newhorizons.ab.ca
Website: www.newhorizons.ab.ca
3 Spruce Avenue Sherwood Park, AB T8A 2B6

Suzuki Charter School Society Charter Grades 1–6
Features music
(780)463–8630 (780)468–2598
Website: www.suzukischool.ca
7211–96A Avenue Edmonton, AB T6B 1B5

Greater North Central Francophone Education Region No. 2

Ecole publique Gabrielle-Roy
8205–90e avenue, Edmonton (Alberta) T6C 1N8
Phone: (780)457–2100
Fax: (780)472–7855

Ecole Maurice-Lavallée
8828, 95e Rue, Edmonton (Alberta) T6C 4H9
Phone: (780)465–6457
Fax: (780)468–0078

Ecole Notre-Dame
15425, 91e avenue Edmonton, Alberta T5R 4Z7
Phone 780–484–7065