The Qu'Appelle Valley INTEGRATED TOURISM STRATEGY

Stage 1: Situational Analysis + Strategic Assessment

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1. Introduction

The Qu'Appelle Valley is one of the most scenic and attractive landscapes in Saskatchewan. The distinct valley setting contrasts with the surrounding prairie, and is complemented by an extensive lake system. The region is home to many First Nations and over 3,700 residents, a population that can triple due to the influx of seasonal residents and visitors. Located only 45 minutes from Regina, the natural beauty of the valley and the area's rich cultural history steadily draws visitors to gather by its four lakes - the Calling Lakes – named after a Cree legend.

Tourism is an important sector of the Qu'Appelle Valley region's economy. While the overall tourism industry was established decades ago, aboriginal tourism is at an early stage of development. Aboriginal tourism can benefit communities by preserving cultural heritage, reinvigorating pride of culture, providing a wide range of employment and entrepreneurial opportunities, and offering specific skills development opportunities.

While welcome, increased tourism use could place pressure on the area's existing infrastructure, communities, and natural and scenic resources. These pressures, if not managed in an integrated manner, could threaten the very reasons that visitors are attracted to the Qu'Appelle Valley. For this reason, the File Hills Qu'Appelle Tribal Council initiated The Qu'Appelle Valley Integrated Tourism Strategy (ITS) project with the support of The Calling Lakes Planning District Commission and the Town of Fort Qu'Appelle.

The Qu'Appelle Valley ITS project seeks to guide tourism development in the Qu'Appelle Valley Calling Lakes region. By consensus, the project will provide concrete direction for tourism development and build capacity to realize full tourism development potential. As part of this capacity-building function, the ITS explicitly considers the demand needs of the tourism industry, and the supply needs of First Nations and municipal policy makers.

1.1. Project Purpose + Objectives

The Qu'Appelle Valley ITS is being undertaken in three-stages, following an integrated approach to tourism development. This integrated approach considers all tourism development within the social and economic life of communities, and the overall environmental context of the area. Integrated tourism development aims to enhance visitor satisfaction, create better businesses, ensure sustainable use of resources and promote community integration.

Following this integrated approach, the overall project objectives are to:

1. Identify a broad range of tourism and recreation opportunities in the Qu'Appelle Valley Calling Lakes region.

2. Coordinate a long-term strategy for the protection and development of tourism and recreation features.

3. Build capacity between the First Nations, and public and private sectors within the Qu'Appelle Valley to effectively address tourism marketing, service and support issues including destination planning, prioritizing of projects, land use decision-making, governance and roles and responsibilities.

Stage 1 - Situational Analysis and Strategic Assessment
The first stage of the project evaluates the overall tourism environment in the Qu'Appelle Valley. This stage provides an overview of the tourism planning context, a complete tourism features inventory and assessment, and a market analysis. A strengths, weaknesses, opportunities and threats analysis considers these factors in an integrated way to establish a picture of the tourism situation. Based on this analysis, aboriginal tourism opportunities are identified and a shared vision, objectives and strategies for integrated tourism development in the Qu'Appelle Valley is recommended. This report presents the results from the first stage of the project.

Stage 2 - Tourism Destination Development Plan
The second stage of the project creates a Tourism Destination Development Plan that will prioritize the strategies identified in the first stage. The Plan will detail some of the high priority strategies developed in Stage 1, and will include high level concepts and design guidelines for key areas within the Qu'Appelle Valley. The Plan will establish a framework, or blueprint, to guide public and private tourism development in First Nations and other communities. The Plan will also provide clear direction to land-use planners with respect to tourism assets that need to be considered in all land use planning initiatives. Finally, the Plan will help create a common brand and marketing strategy.

Stage 3 – Tourism Action and Implementation Plan
The third stage prepares a Tourism Action and Implementation Plan for priority projects selected in Stage 2. The Plan will include in-depth business analysis for prioritized opportunities as well as investor attraction profiles. Concept development for selected projects may be undertaken.

Figure 1.1. Study Area

Legend
- - - Study Area
..... Extended Study Area

Kilometres
0   2.5   5   10
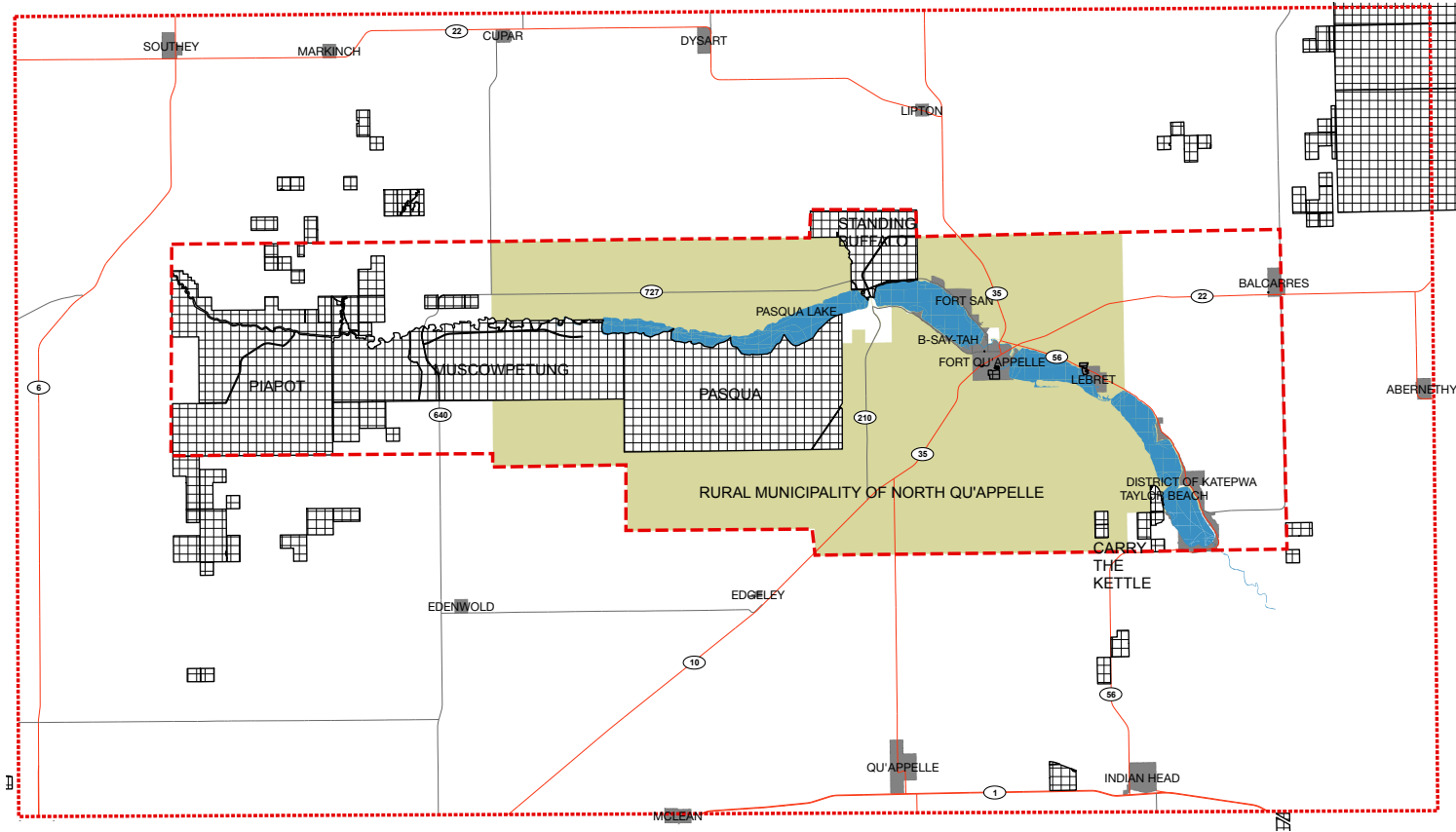
1.2. The Study Area

The jurisdictional boundaries of First Nations reserves and the Calling Lakes Planning District, as well as sections of Cupar Rural Municipality, define the Qu'Appelle Valley study area. Specifically, the study area includes the following First Nations and municipalities:

First Nations

- Carry the Kettle
- Little Black Bear
- Pasqua
- Piapot
- Standing Buffalo
- Star Blanket (White Calf)
- Muscowpetung

Calling Lakes Planning District
- Town of Fort Qu'Appelle
- Rural Municipality of North Qu'Appelle
- Village of Lebret
- Resort Village of B-Say-Tah
- Resort Village of District of Katepwa
- Resort Village of Fort San

Stakeholder Workshop #1 - Features Inventory

Stakeholder Workshop #3 - Recommendations

Postcard Invitations

A larger area was also defined to provide context and capture major attractions that draw visitors in the region. Figure 1.1 presents the extent of the study and extended study areas.

1.3. Stakeholder Engagement Process

The Qu'Appelle Valley ITS was developed through a collaborative process, using both centralized and decentralized engagement activities. Two groups of stakeholders were consulted: the steering committee and a larger group of stakeholders. Stakeholders represented a broad cross-section of tourism interests such as hospitality, recreation, environment and culture as well as municipal and provincial governments and First Nations communities.

The Steering Committee is composed of:

- FHQTC and First Nations members
- Calling Lakes Planning District, and member municipalities
- Tourism Saskatchewan

A complete list of participant stakeholders is provided in Appendix B.

A three-phased stakeholder engagement approach was applied and innovative engagement techniques were implemented to provide additional entry points into the project. The purpose of each phase of engagement and the associate communication techniques and activities are presented in Table 1.1 Stakeholder Engagement Process.

Table 1.1. Stakeholder Engagement Process

Phases	Purpose	Communication techniques	Activities
Phase 1 – Destination Inventory + Analysis **May 2013**	• Provide an overview of the project and the process • Present and obtain input on preliminary analysis • Review and obtain input on the preliminary tourism features inventory results • Launch the online tool application for the recreation/tourism features inventory	• Email • Postcards	• Survey - Kick-off question • Stakeholder workshop • Online Editor tool • Project website updates
Phase 2 - Strengths, Weaknesses, Opportunities and Threats to Tourism Development **May - June 2013**	• Gather input on the SWOT analysis and on the aboriginal tourism status and opportunities	• Email	• Surveys - SWOT and Aboriginal Tourism • Project website updates
Phase 3 - Situational Analysis and Recommendations **August - November 2013**	• Present and gather feedback on the recreation/tourism feature inventory, the SWOT analysis, the situational analysis findings and the recommendations	• Email • Postcards	• Steering Committee • Stakeholder workshop • Project website updates

2. Tourism Context Planning

The tourism planning context provides background information on the history and the First Nations of the Qu'Appelle Valley, the population demographics and growth, relevant plans and policies, ecological and economic context, as well as tourism trends.

2.1. History of the Qu'Appelle Valley

The Qu'Appelle Valley has a long and rich history of settlement. The area is named from an early Cree saying for the landscape: "Katepwe-Cipi" or "Kâ-têpwêwi-sîpy", which means "What is calling? River." The Métis, who formed communities in the Valley during the 1800s, began calling the river "Qu'Appelle", a French translation of the original Cree name.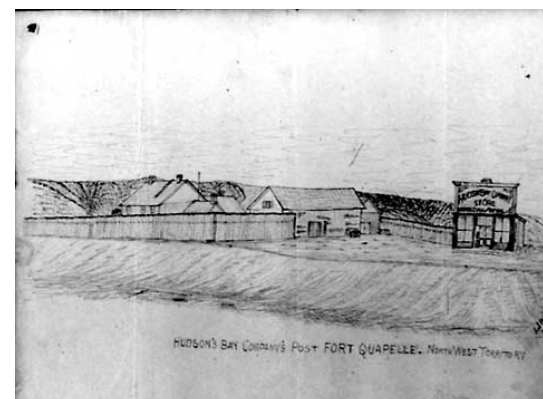 Understanding the area's history helps define place identity and cultural context. Knowing about the history of the landscape is important to any context-sensitive development, and is particularly critical when planning for tourism resources.

Evidence of human occupation in the region dates from 4,780 years ago, with gradual settlement occurring from approximately 2,000 years ago. A site at Lebret shows evidence of human occupation for about 3,000 years. The area's valley landscape played a significant role in attracting occupants to the region, providing a source of food and shelter. The coulee and escarpment landforms offered vantages for the buffalo hunt and provided shelter in the winter. The surrounding lakes served as camps with abundant fish in the summer and waterfowl in the fall. In the late 1700s, the Qu'Appelle Valley waterway became part of an important trade transportation network and precipitated settlement of the area.

In 1864, the Hudson's Bay Company established a trading post at Fort Qu'Appelle. Eight years later, the fort was abandoned but the community remained, eventually becoming the Town of Fort Qu'Appelle. The Town of Fort Qu'Appelle was the site of the Treaty Four negotiations of 1874. This treaty is one of the original treaties signed by the Government of Canada and Aboriginal peoples that established processes and policies for land settlement in Canada. Under the treaty, Aboriginal peoples officially relinquished their claims to millions of acres of land in what is now southern

1864

+ 1864 Hudson's Bay Company

+
Treaty Four Monument

+
Industrial School - Lebret

301. Regina. Fort San looking towards Fort Qu'Appelle.

+
Fort San

+
Tourism in the Qu'Appelle Valley in the 1920's

1874

1884

1917

1920's

Saskatchewan and small portions of western Manitoba and southeastern Alberta. Today, the treaty includes thirty-five First Nations, twenty-eight of which are in Saskatchewan.

Settlement of the area continued with the founding of the Lebret Mission in 1866. The Mission became the centre of Catholicism for the Métis and First Nation people of the region with the construction of the first industrial school in 1884. The purpose of the industrial schools was the education, integration, assimilation and Christianization of aboriginal children into mainstream Canadian society. This episode is considered one of the darkest in Canada's history. The office and the Village were named after of Father Louis Lebret who became the first postmaster of the community. The fieldstone Sacred Heart Church sits in the centre of the village and was built in 1925. In 1929, the landmark stations of the cross and the small chapel on the hill overlooking Lebret were erected.

Fort San derives its name from the Fort Qu'Appelle Sanatorium that operated to treat Saskatchewan tuberculosis patients from 1917 to 1972. Fort San was the first of three sanitoriums to be built in Saskatchewan, and is the only one to remain. Today, three buildings are still located on the site and are registered on the municipal heritage property list.

Through the early 1900s, the area became a popular recreation destination for the growing cities of Regina and Moose Jaw. Prior to World War I, numerous cottages began to appear on area lakes. Excursion trains brought vacationers to resort communities such as Katepwa and B-Say-Tah to enjoy the beaches and fishing. These early cottage areas evolved into organized hamlets and/or village resorts that now comprise the Calling Lakes Planning District and other municipalities. Today, the Qu'Appelle Valley endures as a popular weekend destination and as one of southern Saskatchewan's most beautiful landscapes.

2.2. The First Nations of the Qu'Appelle Valley

The Qu'Appelle Valley is home to many First Nations, five located directly in the study area: Carry the Kettle, Muscowpetung, Pasqua, Piapot, Standing Buffalo, and Star Blanket. The reserve lands include approximately 300 km² of land, which represent 25% of the study area. The First Nation population within the study area, as of 2011, is approximately 2,100, which represents more than a third of the population in the study area. First Nations reserves located within the extended study area include Okanese, Peepeeksis and Star Blanket.

After many decades of negotiation over the status of the Treaty Ground Reserve, the 35 member First Nations successfully reclaimed the land located adjacent to and west of Fort Qu'Appelle. The settlement enabled the First Nations to purchase the land and to construct the Treaty Four Governance Center. The facility is an important centre which includes the Chief's Legislative Assembly and Gallery, First Nations Archive and Keeping House, and cultural centre.

2.3. Communities in the Qu'Appelle Valley

The Town of Fort Qu'Appelle is the largest community within the region with over 2,000 residents. With its many businesses and services, the Town is the activity hub of the region. Businesses and services are concentrated on the main street and along Highway 10. Industrial activities are located at the north-east edge of the Town. Residential development is primarily located north and south of the main street, north of Highway 10. Fort Qu'Appelle is a complete community with schools, health care, museums, a farmer's market, and parks and recreation facilities.

Five hamlets are spread along the chain lakes: Pasqua Lake, B-Say-Tah, Fort San, the Village of Lebret, and the District of Katepwa. These hamlets are considered resort communities and provide various types of residential uses, including year-round and seasonal residences as well as recreational uses and small commercial and institutional uses.

Credit: Lonnie Wishart Photography

+
Town of Fort Qu'Appelle

+
Village of Lebret

2.4. Relevant Plans + Policies

The study area includes multiple planning jurisdictions with an interest in promoting and developing the tourism industry in the Qu'Appelle Valley. Provincial and regional plans set out broad direction for tourism sales and marketing, and identify capacity-building opportunities for tourism operators. District, municipal and First Nations plans identify objectives and policies to support tourism development, and provide land use direction for accommodating new development.

The analysis of existing policies suggests that municipalities are growing, and must provide new residential, recreation and commercial opportunities for the increasing number of visitors and year-round residents that are driving this growth. Municipalities recognize that accommodating this growth requires the protection and preservation of sensitive environmental features that define the Qu'Appelle Valley as a tourism destination. Further, municipalities are sensitive to limiting servicing costs, and ensuring that new development respects the land use requirements of the agricultural sector. The overarching development objective of most plans is to provide opportunities for tourism development that complement and enhance the local area.

Within this context, plans generally provide the following policy direction:

- Minimize conflicting land uses.
- Locate commercial businesses in areas with highway access that serve the travelling public.
- Avoid strip development, and encourage new development to complement or enhance existing services, both in terms of co-location and aesthetic design.
- Preserve environmental features, including view sheds, and heritage/cultural sites.

Policy direction and strategic implications for tourism development across study area planning jurisdictions is summarized in Table 2.1 Relevant Plans + Policies.

Table 2.1. Relevant Plans + Policies

Plans	Policy Direction	Strategic Implications
Provincial		
Tourism Saskatchewan Tourism Saskatchewan is a Treasury Board Crown Corporation responsible for developing and promoting tourism in Saskatchewan.	The corporation's purpose is: 1. To market Saskatchewan as a tourism destination in domestic, national, and international markets; 2. To assist Saskatchewan's tourism industry operators to market their products; 3. To develop and promote the quality of tourism products and services in Saskatchewan; 4. To provide visitor information services; 5. To undertake any other activities or functions assigned by the Lieutenant Governor in Council.	• Partnership opportunities for increased promotion and marketing of the Qu'Appelle Valley as a tourism destination. • Work with Tourism Saskatchewan to develop resources to enhance tourism in the Qu'Appelle Valley. • Work with tourism operators to identify education and training needs.
Regional		
Regina Regional Opportunities Commission (RROC) 2013-2016 Strategic Plan The Strategic Plan identifies tourism sales and marketing as a priority for increasing the economic development potential of tourism for the Regina region. The Plan estimates that 1.65 million people visit Regina each year, spending $285 million on goods and services.	1. Promote tourism opportunities to advance economic prosperity for the Regina region: • Provide industry leadership, and develop a strong sales and marketing role. • Act as the main source of travel information for visitors to Regina. • Assist local organizations develop and secure events.	• Partnership opportunities for increased promotion and marketing of the Qu'Appelle Valley as a tourism destination.
Calling Lakes District Plan (CLDP) "4 Lakes, 4 Seasons, 4 Everyone" DRAFT The District Plan sets direction, provides guidelines, and aligns policies for member municipalities regarding growth management and sustainability in the Qu'Appelle Valley. Member municipalities include: • R.M. of North Qu'Appelle No. 187 • Town of Fort Qu'Appelle • Village of Lebret • Resort Village of B-Say-Tah • Resort Village of District of Katepwa • Resort Village of Fort San	1. Pursue recreation and tourism as primary economic development activities. • Infrastructure investment in roads, greenways, pathways, trails, parks, and recreation amenities is necessary to facilitate access to the region. - 3.2(b)(2)(f)(ii) - 3.2(b)(5)(g) - 3.2(b)(6)(a) + (b) - 3.6(b)(4) • Development should not adversely impact features (the natural environment and areas of cultural, historic and heritage importance) that make the District a popular tourism destination. - 3.3(b)(4) - 3.3(b)(6) + (7) - 3.5(a)(5) 2. Ensure that recreation and tourism development does not create adverse impacts in the District. 3. Tourism and recreation development should enhance environmental features. - 3.5(b)(9) - 3.6(b)(2)(d) - 3.6(b)(2)(e) • New tourism and recreation development should not negatively impact existing tourism businesses. - 3.6(b)(2)(g)	• New recreation development may require permits, and may be a barrier to entry for some smaller businesses. - 3.6(b)(2)(a) - 3.6(b)(2)(g) • New recreation development may only be considered in locations that meet specific land use, public access and need criteria. - 3.6(b)(3) • Viewsheds have not been specifically mapped and identified, and therefore receive no protection from development. - 3.1(a)(6) • The District is committed to creating a trail and pathway system on Municipal Reserve Lands. - 3.2(b)(5)(g) • Agricultural use is defined as generally incompatible with recreational developments. It would be important that zoning bylaws are not so restrictive as to inhibit ancillary services that would promote agri-tourism. - 3.5(b)(2) • Land best suited for recreation should be protected from development, and used for recreation. However, the Plan does not include a map or indication of what these lands are. - 3.6(a)(5) • The District will support zoning bylaws that enhance tourism activities. - 3.5(b)(6)

Plans	Policy Direction	Strategic Implications
First Nations		

Standing Buffalo Dakota First Nation Community Plan	1. Strengths and issues acknowledge that negative impacts of tourism may cause land degradation.
	
	• The beauty of the land, and its potential for resort development, is acknowledged as a community strength. However, existing overuse of the land base due to cottage and motor boats, and better respect for the environment, should be addressed.
	
	2. Action areas recommend ideas and physical projects that could be leveraged to promote tourism.
	
	• Action Area 1 – Community Building
	  - Traditional community map
	  - Cultural activities
	
	• Action Area 2 – Community Building
	  - Hotel/local accommodation
	  - Ski hill
	  - Training for green building practices
	
	• Action Area 3 – Land and Community Infrastructure
	  - Timeline walking trail
	  - Dakota road names to honour elders
	
	• Action Area 4 – Youth, Fun and Recreation
	  - Community beach, dock and marina
	  - Picnic area
	  - Paul LaSwisse Memorial Road Race
	  - Infrastructure upgrades at culture camp
	  - More ball diamonds
	
	3. Land use mapping identifies important physical, ecological and cultural resources for the community.
	
	  - Culturally significant areas are mapped.
	  - Land suitable for development is mapped.
		• The community acknowledges that the land and its natural beauty is an important community resource. Protection of this resource must come from within the community (develop responsibly and instill an ethic of stewardship), but also from neighbouring municipalities.
		
		• Many of the action area projects could be leveraged to develop and promote the tourism industry on-reserve. Specifically, the interest in training for green building practices could be leveraged to build a hotel or resort and become a model for sustainable tourism in the area.
		
		• Land use maps provide direction about land to be conserved, and land suitable for development. Key natural and cultural features are therefore identified and can be protected.

Pasqua First Nation Community Plan
 	
Historical and systemic physical, social, cultural and economic issues have eroded the community's sense of place and overall quality of life.
 	
The Community Plan identifies six action areas and corresponding kick start projects that build on community strengths to realize its vision for a healthy progressive Nation.
	1. Environment, economics and employment action area includes a tourism component.
	
	• Encourages visitors to contribute to the local economy
	  - Kick Start #1: Powwow Arbor and Committee
	
	• Enhances the community's attractiveness as a destination for visitors
	  - Kick Start #2: Landscaping in the Community Core
	
	• Enhances community destinations
	  - Kick Start #6: Walking Trail
		• The learning centre could include curriculum on tourism training and education (capacity building)
		  - Kick Start #5: Learning Centre

Plans	Policy Direction	Strategic Implications
Municipal		

Rural Municipality of North Qu'Appelle No. 187 – Basic Planning Statement
 	
Demand for residential and recreational land uses is expected to increase, while demand for agricultural land is anticipated to fall.
 	
The Planning Statement balances the need to preserve agricultural land, while recognizing the need to accommodate more residents moving to the area year-round.
	1. Support tourism development through commercial and recreational policies.
	• Encourage ancillary developments to residences or farms and the development of campgrounds and other recreational facilities.
	  - 6.2.2(1)
	  - 6.2.2(2)
	• Locate commercial services for the travelling public near safe highway access or near another recreational use.
	  - 6.2.3(3)
	• Developments must display high visual quality.
	  - 7.2.1(5)
	2. Avoid potentially conflicting land uses.
	• Protect agricultural and environmental areas from unsuitable development.
	  - 5.2.2
	  - 7.2.1(2)
	  - 8.1
		• There is clear commitment to encouraging the development of agri-business by accommodating ancillary commercial developments on farms.
		  - 4.2.1(3)
		  - 6.2.3
		
		• The change in the nature of agricultural practices from home-based farmsteads to intensive agricultural practices may detract from the agri-tourism experiences some visitors seek. The policy of separating intensive agricultural land uses becomes very important in this situation.
		  - 4.2.3
		
		• There are no provisions to establish or create a path and trail system.

Town of Fort Qu'Appelle Draft Official Community Plan – Heritage and Cultural Policy Section	1. Protecting and enhancing heritage and cultural resources is linked to tourism development.
	• The Town is a Participant in the Cultural Resource Use Partnership (CRUP), a voluntary, community-driven initiative to support arts and culture in the region.
	• CRUP guiding principles clearly links culture and heritage to the success of tourism in the region.
	2. Conserve heritage and cultural resources through land use designations + design guidelines.
	  - 4.10.1 - 4.10.11
	  - 4.10.2 - 4.10.14
	  - 4.10.4 - 4.10.17
	3. Promote heritage resources and cultural events to celebrate the area's rich cultural history.
	  - 4.10.3 - 4.10.21
	  - 4.10.5 - 4.10.25
	  - 4.10.6 - 4.10.27
	  - 4.10.13 - 4.10.30
	  - 4.10.19
		• Consider the extension of CRUP membership to other area municipalities. The District of Katepwa is already a member.
		
		• A policy framework that improves a town's sense of place will benefit its appeal as a tourism destination.
		
		• The policies suggest a number of resources and events that could leveraged as "catalytic" events to promote tourism in the area, including:
		
		  - Increased use and celebration of the Qu'Appelle Valley Centre for the Arts (QVCA)
		  - Treaty Four Days and Culture Days
		  - Enhanced cultural programming to attract tourism
		  - "Artists-in-Residence" or "Artists-in-Reserve" programming to showcase cultural understanding

Resort Village of District of Katepwa - Basic Planning Statement
 	
Demand for recreational property is anticipated to increase due to the water quality of Katepwa Lake and proximity to Katepwa Point Provincial Park. However land availability for new development is constrained by lack of accessible shoreline, and environmental risk (slope instability and flood hazard).
 	
The Planning Statement establishes objectives and policies to direct development within the context of these constraints.
	1. Ensure that development respects the low-density residential and resort character of the area.
	  - 3.1(1) + (5)
	  - 3.2(2)
	  - 3.2(4)(a) + (b)
	  - 3.2(5)
	  - 3.2(6)
	  - 3.3(1) + (2)
	2. Ensure that development does not create negative visual, environmental or economic impacts
	  - 3.2(4)(a) + (b)
	  - 3.4
	  - 3.5(1)
	  - 3.7
		• There are no policies specific to the development of a tourism or recreation industry.
		• Residential policies generally promote the development of private vacation properties
		  - 3.2(1) + (2)
		
		• Recreation policies are limited to encouraging maintenance of existing recreation facilities
		  - 3.3(1) + (2)
		
		• Commercial policies do not specify the types of commercial services that would enhance the area as a recreation destination.
		  - 3.5(1), (2) + (3)

2.5. Population Demographics + Growth

Approximately 5,900 people live in the study area, including over 2,100 Aboriginal and Métis living on reserve. The area's population can more than triple between May and September due to seasonal residents and visitors. Demographic trends affect tourism development in the region, in terms of the labour force, development trends and the provision of commercial services.

Older adults comprise the majority of the population across study area municipalities, with approximately 49% being over the age of 60. Population growth in the area varies significantly from one municipality to another. The District of Katepwa has experienced the highest rates of growth in the region, with an increase of 41% between 2006-2011. Conversely, Fort San has experienced a population decline of 13%. The major centre in the region, Fort Qu'Appelle, is growing at a much slower rate than the average for the region, with a population increase of 6%.

The Calling Lakes Planning District anticipates that an ageing population will drive growth in the area. The majority of this growth is likely to be older adults choosing to retire in the region. Specifically, the area has seen a trend toward the conversion of cottages to year-round residences to take advantage of the "cottage" lifestyle in retirement. Some younger families attracted by this lifestyle may also choose the region as a permanent residence, facilitated by more flexible work arrangements and telecommuting options.

Growth rates in these areas are significantly influenced by the availability of land for development. The increased growth in the District of Katepwa is a direct result of 60 new lots/parcels for development created in the last few years. The Town of Fort Qu'Appelle has fewer developable parcels, and is experiencing slower growth as a result.

Consistent with national trends, population growth on First Nations reserves is quite strong. The age distribution on-reserve is much younger than surrounding municipalities, with 53% of the population under the age of 24.

The demographics of the region affect tourism development. The ageing population across municipalities suggests the tourism labour force may experience supply shortages. There is an opportunity for off-reserve employment in the tourism sector for First Nations living in the area to make up labour force gaps, and opportunities for employment on reserves with an increase in aboriginal tourism. The growth of an ageing population also suggests that the area is becoming a popular retirement destination. This trend could strengthen the emerging demand for cottage conversions to year-round residences, or the creation of new destination retirement communities. In the case of new development, the identification of land supply to accommodate growth is an important consideration for municipalities.

The seasonal fluctuation in population also impacts the labour force, and the operation of local businesses and services. At the regional level, there is a need to ensure that residents and visitors are provided with adequate levels

of commercial and business services as the population fluctuates through the year. Seasonal businesses such as farm stands, cafés, and programmed recreation opportunities help provide additional market capacity, however rely on a part-time employment model that may not be feasible or desirable.

Table 2.2. Population Demographics

|	2006	2011	% of change
R.M. of North Qu'Appelle No.187	852	728	-14.6
Town of Fort Qu'Appelle	1,919	2,034	6.0
Village of Lebret	203	218	7.4
Resort Village of B-Say-Tah	206	187	-9.2
Resort Village of Fort San	215	187	-13.0
Resort Village of District of Katepwa	285	403	41.4
Piapot	448	464	3.6
Pasqua	472	546	15.7
Standing Buffalo	446	651	46
Muscowpetung	290	365	25.9
Wa-Pii Moos-Toosis (White Calf)	81	97	19.8
Treaty Four Reserve Grounds	0	10	-
Municipalities	**3,680**	**3,757**	**2**
First Nations	**1,737**	**2,133**	**18.6**
TOTAL	**5,417**	**5,890**	**8.0**
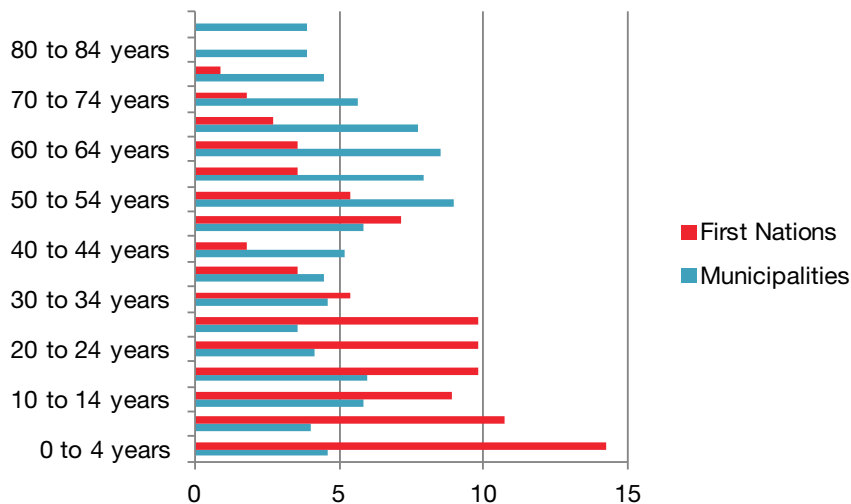
Figure 2.1. Population Age Distribution (% of total population)

(Includes: Town of Fort Qu'Appelle, R.M. of North Qu'Appelle, B-Say-Tah Resort Village, Fort San Resort Village, Village of Lebret, Piapot and Wa-Pii Moostoosis (White Calf))

Table 2.3. Median Income of Families in the Qu'Appelle Valley

	Median Income 2005 All Census Families
R.M. of North Qu'Appelle No.187	$ 72,010
Town of Fort Qu'Appelle	$ 48,116
Resort Village of District of Katepwa	$ 59,264
Piapot	$ 16,139
Pasqua	$ 19,232
Standing Buffalo	$ 16,768
Muscowpetung	$ 25,472
Saskatchewan	$ 58,563

2.6. Economic Context

The economy of the Qu'Appelle Valley is primarily service-based, with a range of recreational and commercial operations as well as agriculture and agricultural-related services. Operations vary in size and are located in municipalities throughout the region.

The Town of Fort Qu'Appelle is the economic and business hub of the region. The Town provides retail, grocery, agriculture, tourism, health care, automotive and marine services. These services include a mix of small, locally-owned and operated commercial and retail businesses, with some small-scape national chain presence. Locally operated businesses are an important part of the Qu'Appelle Valley's economy.

The unemployment rate in the Town of Fort Qu'Appelle is 8%, slightly over the provincial rate of 5.6%. Unemployment in the surrounding municipalities is very low or non-existent. The median income in Fort Qu'Appelle is lower than the provincial average. The highest median income is earned in the rural municipality of North Qu'Appelle and the District of Katepwa.

2.7. Natural Environment Context

The natural environment context describes the ecology and environment of the Qu'Appelle Valley. Climate and habitats are presented, and environmental issues affecting the Qu'Appelle Valley such as climate variability, climate change, flooding, and water quality are discussed. More detailed information on the natural features that support or have the potential to support recreation and tourism opportunities are presented in Section 3.1 Natural Features.

2.7.1. Climate

The Qu'Appelle Valley region has a humid continental climate[1]. Winters are long and cold, with an average temperature of -15.50C in January and continuous snow cover. About 25% of annual precipitation falls as snow. Although most snowfall occurs from November to March, snow also typically occurs in April, May, October, and even September in some years. Summers are short and warm, with an average of 18.30C in July. The four lakes are ice-covered for four to five months each year. Annual precipitation averages 453 mm, with the highest monthly rainfall occurring in June (77 mm) and July (79 mm). The Qu'Appelle Valley is located within one of the sunniest regions of Canada, with over 300 days per year of measurable sunshine in an average year.

2.7.2. Vegetation + Habitat

The Qu'Appelle Valley lies within the Aspen Parkland ecoregion. An ecoregion is a relatively large area of land presenting characteristic combinations of soil, landforms and associated vegetation and wildlife communities. This ecoregion is considered transitional between the Boreal Forest Ecoregion to the north and the grasslands to the south. The region presents a mosaic of trembling aspens, oak groves, mixed tall shrubs and

1 However, areas further upstream in the Qu'Appelle watershed are characterized by a dry subhumid climate

fescue grasslands. On the plateau, flat grassland areas are interspersed with several shallow wetlands and small lakes that provide habitat for waterfowl.

The Aspen Parkland Ecoregion provides a major breeding habitat for waterfowl and includes habitat for white-tailed deer, coyote, snowshoe hare, cottontail, red fox, and bird species such as sharp-tailed grouse and black-billed magpie. Pelicans are also known to nest and fish in the surrounding lakes. With its fertile soil and favourable climate, the region represents some of the most productive soils in the prairies.

2.7.3. Rare Species

The Qu'Appelle Valley region counts some rare wildlife and plants species. The Saskatchewan Conservation Data Centre was consulted for records on rare species in the study area.

Bigmouth Buffalos is the largest of suckers in Saskatchewan and is considered a species of special concern. They are well adapted to the reservoirs of the Qu'Appelle River system which they inhabit. Although there are no recorded observations in the provincial database, they are expected to be found at the bottom of shallow lakes ponds pools of large streams and manmade impoundments where food sources are abundant.

A variety of locally rare plants have been observed, mostly occurring directly in the river valley area. Specimens such as Racemose Milk-vetch, Spiny Milk-vetch, Small Lupine, Beaked-annual Skeleton-weed, Assiniboia Sedge, Geyer onion and Various-glumed Wild Rye are among those observed.

Areas of the Qu'Appelle River Valley have been identified as Migratory Bird Concentration Sites, where a wide diversity of birds, such as pelicans and grebes come to stage, colonize or nest.

2.7.4. Climate Variability + Climate Change

Climate and weather can vary considerably from year to year in the Qu'Appelle Valley. Major droughts and flooding are known to occur. Recent droughts were experienced in 2001 and 2009. In 2001, the total recorded precipitation in the Qu'Appelle Valley was only 175 mm, indicating severe drought conditions. In a longer term context, severe and prolonged droughts have occurred repeatedly across this region in the past. Major droughts appear to have persisted throughout much of the 1500s as well as the mid 1800s (Sauchyn et al., 2002).

Ongoing climate change is highly likely to continue and increase in severity as the 21st century progresses (IPCC, 2007). Over the past 50 years, average temperatures across Canada have increased by approximately 1.2°C, and increases in average temperature of up to 4-5°C in southern Saskatchewan on average are projected by 2060 (Health Canada, 2008). The most pronounced increases have occurred at night and during the winter, consistent with the theory that increasing greenhouse gases in the atmosphere are causing the observed changes. In addition, climate change is expected to increase the frequency and severity of both floods and droughts in Regina (Natural Resources Canada, 2009).

Flood - Katepwa Pelican Point 2011

2.7.5. Hydrology + Flooding

Under natural conditions, the Qu'Appelle River was an intermittent stream, but is now augmented by the presence of the Qu'Appelle Dam. The Calling Lakes include the Katepwa, Mission, Echo and Pasqua Lakes, which are all located in the Lower Qu'Appelle River Watershed.

The hydrologic regime of the Qu'Appelle River at Lumsden is dominated by spring runoff. An annual average hydrograph showing flows in the Qu'Appelle River is shown in Figure 2.2.

The construction of the Katepwa Weir (1888) and the Echo Lake Dam (1941) altered the natural flow of the river and raised the water level of the lakes. Lake levels in the past have varied, and at times the channel between Pasqua Lake and Echo Lake has been impassable to boats due to low water levels, with dry lakebed exposed in some areas. Water control structures were recently designed and installed to address this issue. Other water control structures are present at Pasqua and Echo Lakes to raise and stabilize the water levels in these lakes.

These lakes and the surrounding shorelines are prone to flooding. In 2011, the region experienced a one-in-500-year flood event that caused damage to many lakefront properties. Communities learned from the event and are better prepared to face future flooding events. Many municipalities have established development standards and setbacks to regulate the construction of new buildings in floodway and flood fringe areas. In January of 2013, the Saskatchewan Water Security Agency recommended sandbagging to prevent flooding in anticipation of high water levels. The agency is responsible for watershed planning, and for monitoring lake levels in the Qu'Appelle Valley.
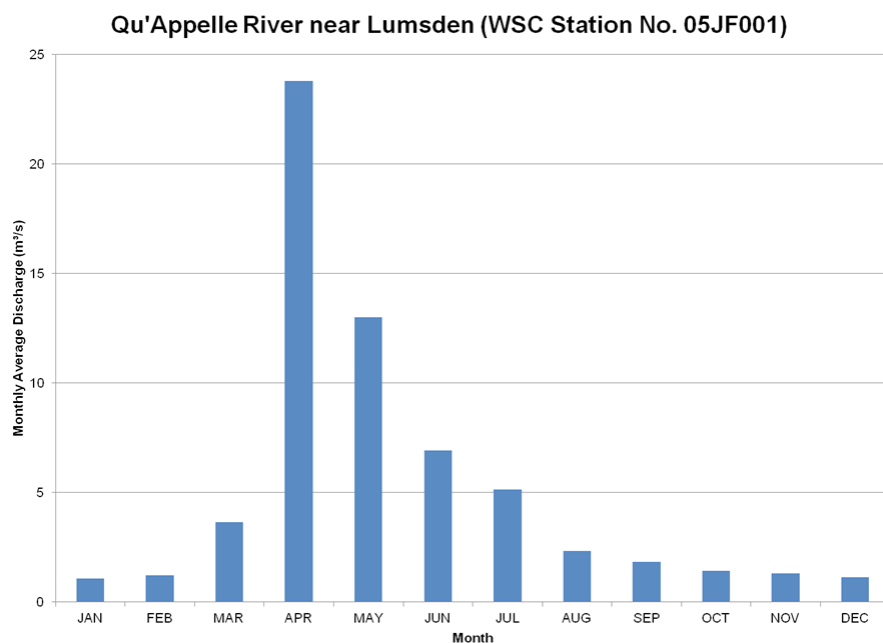

Figure 2.2. Annual Hydrograph for Qu'Appelle River

2.7.6. Water Quality

Davies et al (2006) recently calculated the Canadian Water Quality Index (CWQI)[2] for lakes in the Qu'Appelle River Valley with multi-year data (Figure 2.3). A slight increase in water quality occurs from upstream to downstream through the Calling Lake system. Overall, water quality in Pasqua and Echo Lakes fall into the "Marginal "(45-59) category, which has been defined in the CWQI as "water quality is frequently threatened or impaired; conditions often depart from natural or desirable levels". Water quality in the Mission, and Katepwa lakes fall into the "Fair" water quality category, defined as "water quality is usually protected but occasionally is threatened or impaired; conditions sometimes depart from natural or desirable levels".

One of the major water quality issues in the lakes of the Qu'Appelle Valley is eutrophication and algal blooms. The Qu'Appelle River watershed contains many nutrient-rich soils, which creates naturally high concentrations of nitrogen (N) and phosphorus (P)[3]. In turn, these nutrients drive relatively high productivity of plants and algae. Concentrations of N and P have also increased due to "cultural eutrophication" from upstream human activities, including wastewater discharge, fertilizer application, livestock production, soil erosion and runoff. The eutrophic or "nutrient-rich" conditions of the Qu'Appelle River and the Calling Lakes can lead to algal blooms. During algal blooms, oxygen concentrations can become depleted when large volumes of organic matter decompose, and toxic blue-green algae or Microcystis microorganisms can be present in concentrations that pose health hazards.

Although some natural algal blooms reportedly occurred in the Calling Lakes prior to European settlement (Hind 1859; as quoted in Davies et al. 2006), "cultural eutrophication" has likely increased the frequency and intensity of algal blooms. Several scientists, including Dr. Peter Leavitt at the University of Regina, have studied nutrient levels and algal blooms in Pasqua Lake for over a decade. They have applied the techniques of "paleolimnology" to reconstruct historical water quality based on preserved fossil records of microorganisms in sediment cores. These studies have clearly shown that urban and agricultural activities have increased nutrient concentrations in Pasqua Lake over the past 125 years. Algal abundance in Pasqua Lake has increased by approximately 300% since 1880, and a large portion of this was correlated with N influx from urban wastewater.

Water Quality Ranking

Excellent - Water quality is protected with a virtual absence of threat or impairment; conditions very close to natural or pristine levels.

Good - Water quality is protected with only a minor degree of threat or impairment; conditions rarely depart from natural or desirable levels.

Fair - Water quality is usually protected but occasionally threatened or impaired; conditions sometimes depart from natural or desirable levels.

Marginal - Water quality is frequently threatened or impaired; conditions often depart from natural or desirable levels.

Poor - Water quality is almost always threatened or impaired; conditions usually depart from natural or desirable levels.
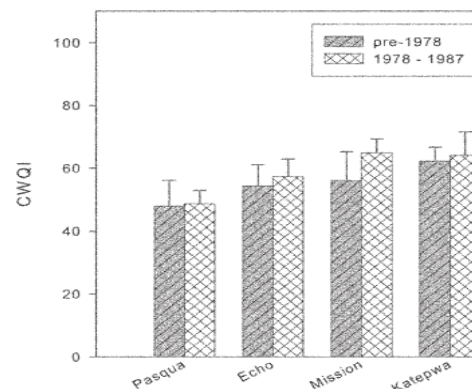
Figure 2.3. Canadian Water Quality Index Values for the Calling Lakes

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2 The CWQI integrates long-term statistical information on pH, dissolved oxygen, chlorophyll A, dissolved solids, nutrients, heavy metals, pesticides, and microbiological water quality criteria into a simple single indicator

3 Algal blooms on the prairies have been linked to both nitrogen (Leavitt et al., 2006) and phosphorus (Schindler et al., 2008). In fact, both these nutrients influence algal blooms in Saskatchewan (Maberly et al., 2002; Elser et al., 1990; Salm et al., 2009).

Algae Bloom, Pasqua Lake

This problem of eutrophication in the Qu'Appelle Valley creates several constraints for tourism and recreation opportunities when algal blooms occur, including:

- Degradation of amenity values

- Odour problems

- Degradation of aquatic habitats and lower species diversity

- Potential for fish kills

- Health concerns if toxic microorganisms such as Microcystis or blue-green algae are present (the Government of Saskatchewan advises the public to avoid swimming in water or drinking any water where blue-green algae blooms are present)

- Periods of hot, sunny weather typically drive high algal productivity and algal blooms, which unfortunately tends to coincide with peak seasonal demand for lake-based tourism and recreation activities

Several new developments with regards to wastewater treatment and watershed planning are underway and may help begin to address the water quality issues in the Qu'Appelle Valley. In 2012, the federal government changed regulations for municipal wastewater treatment standards. Municipalities are required to meet these standards by 2020 and 2030. The provincial government also requires that the City of Regina upgrade its waste water treatment plant by the end of 2016. Furthermore, the Regina plant also needs to be upgraded to meet long-term future growth needs. Much of the planning work for the upgrades was completed by The City of Regina in 2011 and 2012, and construction is scheduled to occur between 2014 and the spring of 2017 (City of Regina, 2013). However, Dr. Peter Leavitt has stated that there will likely be a delay in terms of a water quality response in the lake systems of up to 10 years or more once improvements are made. There are also watershed planning initiatives underway through the Water Security Agency, including the Upper Qu'Appelle River and Wascana Creek Watersheds Source Water Protection Plan and the Lower Qu'Appelle River Watershed Plan.

2.8. Tourism Destination Lifecycle Assessment

Like most products, tourism destinations have a lifecycle. In an article published in 1980, Butler proposed a now widely-accepted model of the lifecycle of a tourist destination. This model describes how a destination starts off slowly with visitor numbers limited by facilities and access. As the destination attracts more visitors, amenities are improved, and visitor numbers grow rapidly towards and sometimes beyond the carrying capacity of the destination. These stages are plotted on a bell curve shown of Figure 2.4.

Understanding this model is essential to recognize that tourism destinations and attractions are not infinite and timeless. Rather, they should be viewed and treated as finite and possibly non-renewable resources. Intrinsic qualities of a tourism destination should be protected and preserved. Development of the destination should be kept within predetermined capacity limits, and its potential competitiveness maintained over the long term.

There is a stage before the decline where the destination stakeholders can intervene and pursue a range of options to reinvigorate the tourism destination. Options could include increasing the capacity, encouraging new markets, or developing new tourism products. The Qu'Appelle Valley Calling Lakes region is considered by many to be at this crucial time.
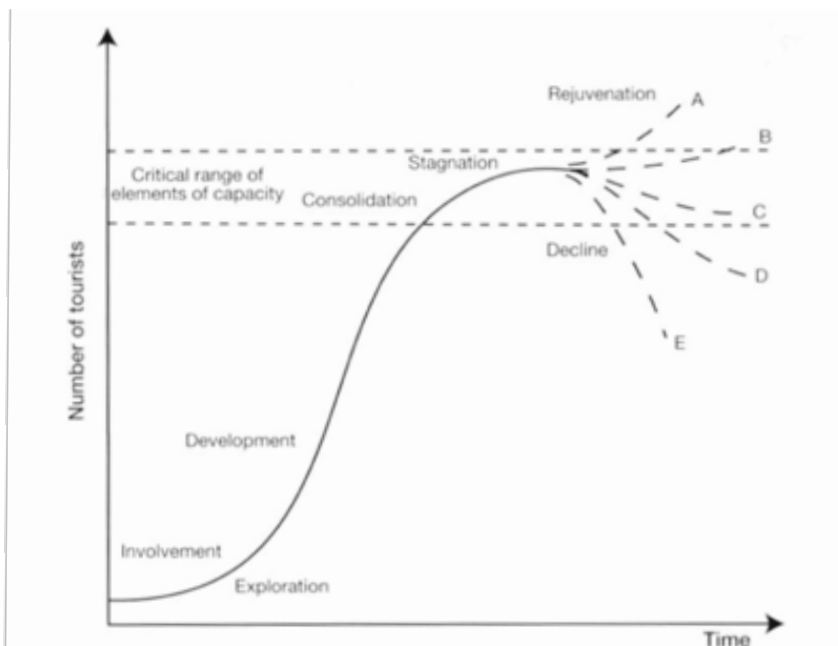

Figure 2.4. Butler's Tourist Area Lifecycle

2.9. Tourism Trends

Trends in the tourism sector can provide an indication of how to plan for long-term tourism strategies. Travel trends were not systematically identified for the Qu'Appelle Valley as part of this project, however major trends have been considered in the development of this plan. The major trends applicable to this project are presented in Table 2.4.

Table 2.4. Tourism Trends

Aboriginal Tourism

Aboriginal tourism empowers Aboriginal peoples to tell their story, and share cultural insights, traditional practices and contemporary concerns with non-Aboriginal visitors. The tourism experience or service is majority-owned or -operated by Aboriginal people and/or in partnership with non-Aboriginal operators. International visitors increasingly seek this type of experience. First Nations in BC have successfully developed an Aboriginal tourism sector which has received significant interest since the 2010 Olympics in Vancouver, BC.

Cultural Tourism

Cultural tourism is a type of travelling where visitors are interested in discovering a region's culture and history. The destination is chosen based on the variety and quality of cultural products and experiences. The history of a place and its people, the architecture, the museums, the performances and arts are elements sought by visitors. Aboriginal tourism is an important segment of cultural tourism.

Ecotourism

Ecotourism is defined as responsible travel to natural areas that conserves the environment while improving the well-being of local residents. Ecotourism principles include minimizing impacts on the environment, building environmental and cultural awareness, providing financial benefits for conservation and strengthening local communities. Aboriginal tourism is also one type of ecotourism.

Adventure Tourism

Adventure tourism, also known as nature-based tourism, involves travelers experiencing the natural environment through a variety of outdoor activities. Activities include experiences that travelers would not normally have the chance to partake. Within this sector, travelers are demanding a greater level of interpretation and education to complement their adventure experiences.

Agri-tourism

Agri-tourism encourages visitors to discover agricultural life first hand. Visitors are exposed to a range of experiences, including farm-stays, working vacations, direct purchasing from farm-stands, guided tours, tasting events or cooking lessons.

Culinary Tourism

Culinary tourism is the pursuit of a unique and memorable eating and drinking experience. Travellers are increasingly seeking a food experience that is connected to the heritage, people and landscape of a geographic area.

Ease of Planning

Travelers are increasingly looking for accessible information to help plan their trips. The internet is the most common platform for finding travel-based information. Group tours, packages, and predefined travel itineraries are very attractive to travelers in search of a destination.

Travel Technology / e-tourism

The application of technology in tourism, whether for vacation-planning or during the vacation, is transforming tourism globally. Tech-related innovations in the travel industry include everything from social media, tourism campaigns, e-booking to apps that act like a tour guide. The use of the Internet allows small businesses to compete internationally, and is a cost-effective mechanism for branding, marketing and expanding tourism service offerings.

3. The Qu'Appelle Valley Tourism Features + Resources

Tourism features and resources are the biophysical, amenity, cultural or historical elements that support, or have the potential to support, one or more recreation and tourism activities. An inventory and analysis of tourism features and resources identifies significant tourism areas in the Qu'Appelle Valley. The inventory considers natural features, scenic resources, aboriginal tourism features, cultural heritage features and the diversity of recreation and tourism settings. Based on these analyses, significant tourism areas are identified and mapped as a starting point for tourism planning in the region.

3.1. Natural Features

The Qu'Appelle Valley's natural features contribute significantly to the high quality of life of its residents and the tourism industry. The scenic resources provided by the landforms, the Calling Lakes, the Qu'Appelle River, and the native vegetation create a strong bond between residents, visitors and nature. These natural features currently support recreation and tourism activities or have the potential to support new tourism opportunities. Natural features are shown on Figure 3.1.

3.1.1. Landforms

The Qu'Appelle Valley is a unique landform in the mostly flat southern Saskatchewan. The deep, scenic valley was formed by a retreating glacier during the last ice age, 14,000 years ago. The valley sides are steeply sloped, featuring grades that range between 25% and 50%. The cooler east or north-facing slopes tend to be forested while the south or west-facing slopes are grasslands. These steep slopes provide stunning views of the valley and great hiking opportunities.

What is special about the Qu'Appelle Valley?

"The sense of place that the region has to the heritage of the province and the historical context to the First nations community not only from the perspective of the past but also in context of today and the future."

"Best kept secret in Saskatchewan. Lots to be discovered."

"First Nations and Metis relationship to the region both before and after the Treaty signing."

"Forty minutes from two thirds of the Saskatchewan population and an International Airport."

"Beautiful historic location, unlike open prairie, but close to Regina and the Trans Canada Highway."

+
Answers from Stakeholders

Landforms

Canoeing on the Qu'Appelle River

Fishing on the Calling Lakes

Katepwa Point Provincial Park

3.1.2. Water Bodies

Calling Lakes

The Calling Lakes, known to locals and frequent visitors, as the "fishing lakes", offer great recreation and tourism opportunities. Recreation on the lake includes fishing, boating and swimming in summer; and ice-skating, ice-fishing, cross-country skiing and snowmobiling in winter. Beaches and boat launches provide access to the lakes, and are well-used by residents and visitors. True to name, fishing is one of the most popular activities on the lake. The Walleye Cup, an annual fishing tournament drawing participants from across North America, was held in the Calling Lakes until recently.

Qu'Appelle River

The Qu'Appelle River flows from Lake Diefenbaker in southwestern Saskatchewan to join the Assiniboine River in Manitoba near the village of St. Lazare. The river is known as one of Saskatchewan's best kept paddling secrets among enthusiastic paddlers. The river is easy to navigate, however winds can be challenging. The river affords a scenic vantage of the region, and flows through many changing landscapes such as grassy banks, gradual to steep clay banks, crop field and forest. There are currently no designated facilities along the Qu'Appelle River for this activity.

Streams

Multiple permanent and intermittent streams drain into the valley. Currently there are no facilities that provide access to these streams. A networked trail system that connects the valley to the plateau alongside stream beds may be a future recreation opportunity.

Wetland Complexes

Each side of the Qu'Appelle Valley features a large wetland complex. Located on the plateaus, these kettle lakes and prairie pothole formations provide critical ecological infrastructure that support wildlife habitat and drainage functions. These complexes do not currently support any recreation or tourism activities and are located on private land.

3.1.3. Vegetation

Native vegetation is scattered throughout the valley, however most large patches of native, untouched vegetation are located on First Nations reserves. Approximately 20 km of shoreline remain untouched or natural along Pasqua Lake on the Pasqua and Muscowpetung reserves.

Native vegetation is characterized by trembling aspen tree and oak grove tree stands (deciduous forest), sparse coniferous forest, mixed tall shrubs (shrubland), and intermittent fescue grasslands. Species include spear grass, wheat grass, chockecherry, snowberry, rose and wolf willow. Vegetated coulees are also present throughout the area along steep valley slopes.

Legend

Study Area
Extented Study Area

Land Cover

Wetland
Grassland
Shrubland
Coniferous Forest
Deciduous Forest
Other Forest

Water Body
Watercourse
Protection / Conservation
Slopes > 15%

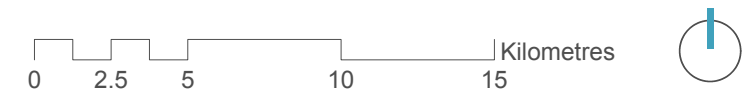Kilometres
0   2.5   5   10   15
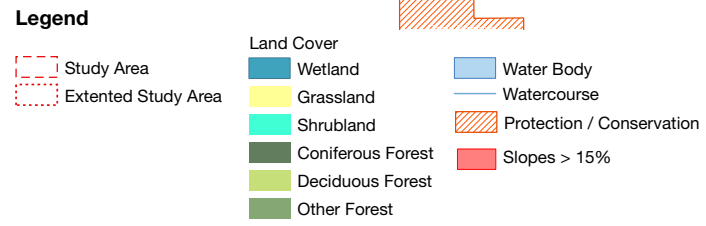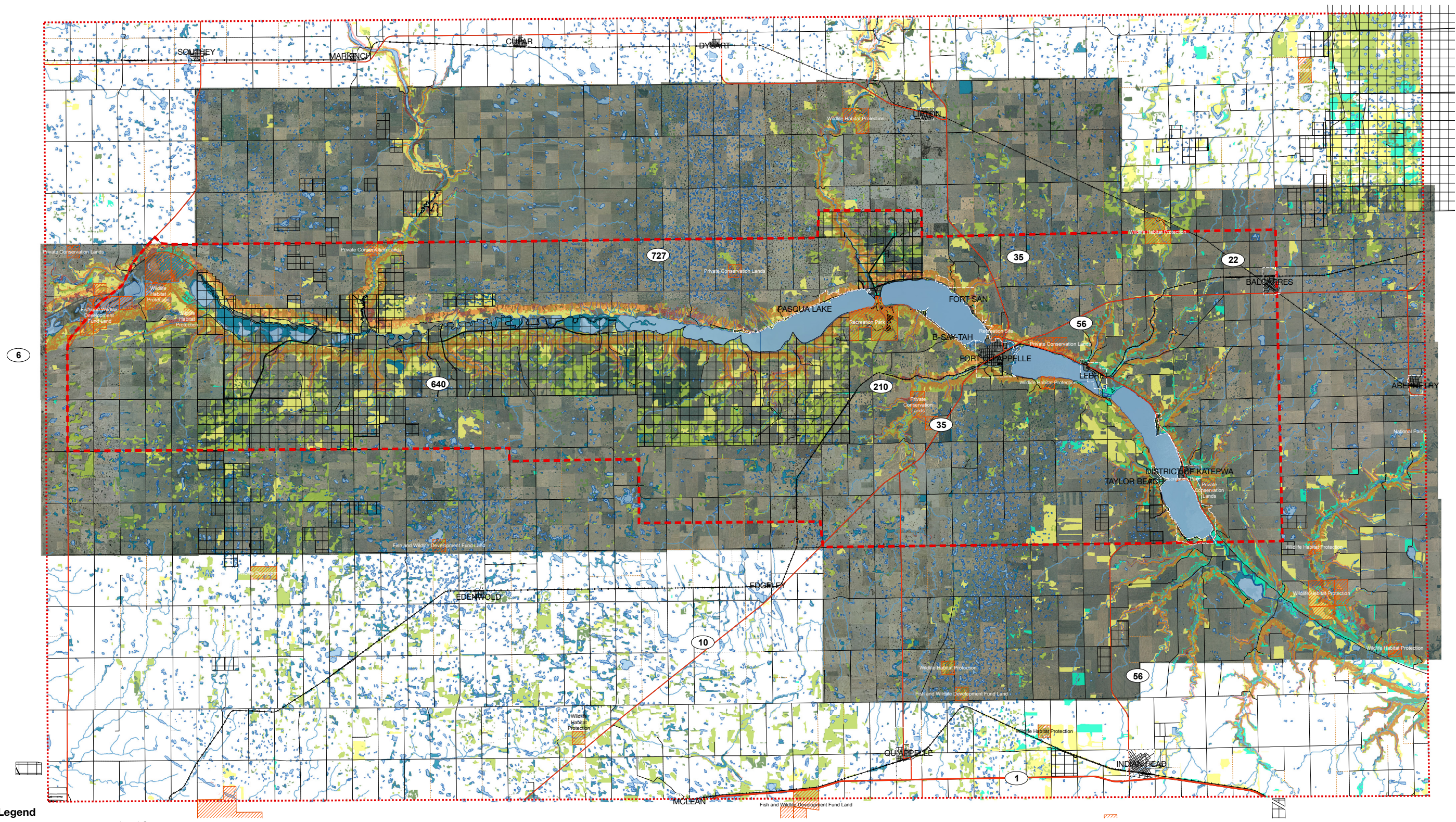
Figure 3.1. Natural Features

3.1.4. Conservation + Protected Areas

Protected sites are located throughout the study area. The level of protection for each site ranges from private conservation lands to areas designated for wildlife habitat protection, and provincial parks. A relatively large area of protected and private conservation lands is located in the western portion of the extended study area, just east of Highway 6, and a large park is located west of B-Say-Tah. Smaller conservation areas are spread around the lakes. With the exception of the provincial parks, these areas do not currently support low intensity recreation and tourism activities.

3.2. Scenic Resources

The scenery of the Qu'Appelle Valley is one of the region's most distinctive and important assets. While determining the scenic quality of a given area is highly subjective, several studies have demonstrated that public perception of a landscape's inherent scenic quality generally correlates with the presence or obstruction of certain landscape features, such as water bodies and shorelines, important cultural features, vegetation pattern and composition, as well as measures of distance and visibility that frame significant views (Purcell & Lamb 1998, Junker & Buchecker 2008, Garre et al. 2009, Herbst et al. 2009, and British Columbia Ministry of Forests1996 & 1997).

In the interest of understanding the scenic resource, its value and effective management strategies, it is useful to categorize the landscape into defined units based on overall character or type. According to the USDA Forest Service Scenery Management System (SMS), landscape character Units "give an area its visual and cultural image, and consist of a combination of physical, biological, and cultural attributes that make each landscape identifiable or unique" (USDA Forest Service 1994).

The visual landscape units defined for the Qu'Appelle Valley have been assessed to determine their overarching landscape character, scenic quality and integrity, and visual sensitivity as a basis for tourism opportunities identification and potential scenic protection policies and measures.

- Landscape character is primarily based on similarities in landform, vegetation, cultural features, and water features and is described in terms of the line, form, color, texture, and composition that define a landscape.

- Scenic quality/integrity is a measure of a landscape's scenic quality in terms of its natural wholeness or intactness with regards to human intervention effects.

- Visual sensitivity is a measure of how visible an area is based on the distance from an observer, as well as particular human values associated with a given landscape. Visual sensitivity is usually highest where major corridors and recreation/tourism features offer high elevation viewpoints and/or open vistas. Water bodies, streams, and shorelines are also highly visually sensitive features.

3.2.1. Visual Landscape Units

The landscapes of the Qu'Appelle Valley can be classified into eight different units, based primarily on similarities in topography, vegetation, or land use. Units have been evaluated for their inherent scenic quality and to determine tourism development opportunities and constraints based on unique biophysical characteristics. Figure 3.2 shows the landscape units.

Since the landscape can be a combination of many different vegetation types, land uses, or slopes that occur in small patches, the landscape units presented below represent a coarse grain view of the landscape, and are only approximate.

- Kettle lakes and prairie potholes
- Coulees
- Forested lakefront slopes
- Sand pits
- Mesic river valley / Qu'Appelle River valley
- Parkland lowland
- Parkland plateaus
- Developed nodes

Kettle lakes and prairie potholes
Landscape Character- Flat grassland area marked by several shallow wetlands and small lakes.
Scenic Quality and Integrity- High
Visual Sensitivity- Low due to distance from major roads

Coulees
Landscape Character- Medium to steeply sloping ravines with north facing slopes covered by trees and shrubs.
Scenic Quality and Integrity- High
Visual Sensitivity- High due to high elevation viewpoints and open vistas

Forested Waterfront Slopes
Landscape Character- Steeply sloped area along the shoreline vegetated with shrubs and trees.
Scenic Quality and Integrity- Very High
Visual Sensitivity- High due to open vistas

Sand Pits
Landscape Character- Flat, sandy deltas at the water's edge; frequently sites of development.
Scenic Quality and Integrity- Very High
Visual Sensitivity- High due to development potential and visibility

Mesic River Valley
Landscape Character- Moderately sloped to flat area covered by trees, shrubs, ephemeral wetlands, and agriculture.
Scenic Quality and Integrity- High
Visual Sensitivity- Low due to limited road access

+
Ketlle Lakes and Prairie Potholes

+
Coulees

+
Forested Waterfront Slopes

+
Sand Pits

Parkland Lowland
Landscape Character- Mixture of grassland, scattered stands of trees and shrubs, and agriculture. Roads pass through as access corridors to Fort Qu'Appelle and other developed nodes.
Scenic Quality and Integrity- Moderate
Visual Sensitivity- High due to agricultural land use along major roads

Parkland Plateau
Landscape Character- Flat upland area characterized by a mix of grassland, shrubs, and kettle lakes. Roads pass through as access corridors to Fort Qu'Appelle and other developed nodes.
Scenic Quality and Integrity- High
Visual Sensitivity- High along major roads

Development Nodes
Landscape Character- Developed centers of human settlement situated as nodes along the lakefront.
Scenic Quality and Integrity- Moderate
Visual Sensitivity- Very High due to development potential and use volume.

3.2.2. Scenic Corridors

Road scenery refers to the adjacent roadside environment and is very important in a tourism experience as it contributes to the first impression of a destination. These linear corridors do not necessarily belong to any particular landscape unit as they pass through several landscape units. These scenic corridors have high levels of visual sensitivity due to their use, volume and function as important access corridors into the region. Scenic corridors are mostly affected by roadside signage, development and other amenities that may directly enter into the view of a travelling car. Figure 3.3 identifies the scenic corridors.

3.2.3. Visibility

Visibility refers to the overall landscape view, or viewshed, that can be seen from a particular vantage point. Corridors and lakes were chosen as vantage points as they experience the highest visitor levels. Similar to the scenic corridor, these views are important in a tourism experience as they are the overall representation of the landscape. Many of the areas are very sensitive as they can be seen from multiple locations. Views are most affected by physical development that is inconsistent with the visual and cultural image of a particular landscape. Figure 3.5 shows that the waterfront slopes are highly visible from the lakes. Visibility from the scenic corridors, as shown on Figure 3.4, is quite different due to the flat topography.
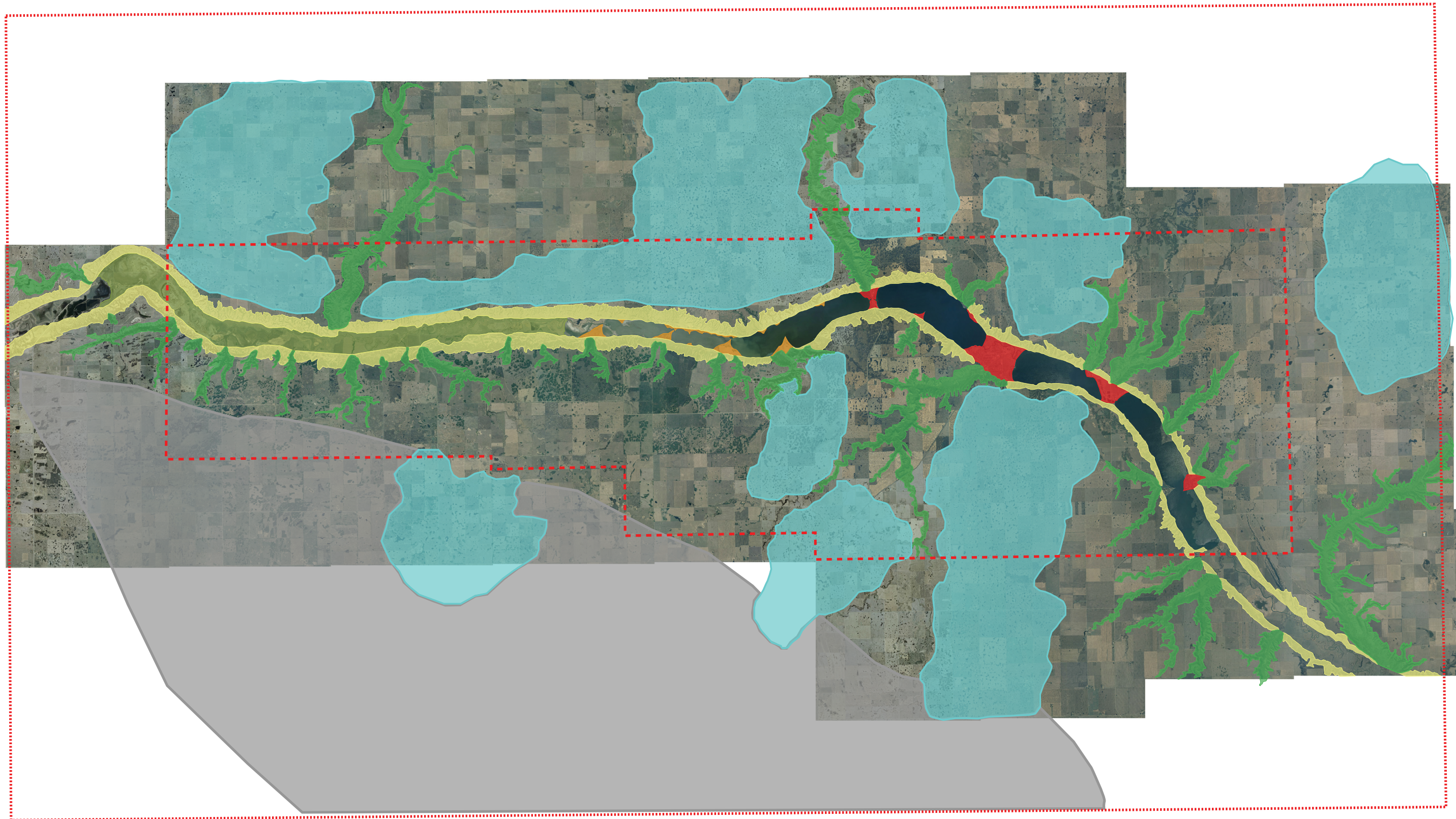
Legend

⬛ Parkland plateau	🟩 Coulees
⬜ Parkland lowlands	🟥 Developed nodes
🟦 Kettle lakes and prairie potholes	🟧 Sand pits
🟩 Mesic river valley	- - - Study boundary
🟨 Foresed lakefront slopes	····· Extended study boundary

Kilometres
0   2.5   5   10

Figure 3.2. Visual Landscape Units

Figure 3.3. Scenic Corridors

Legend:
- Scenic Corridors
- Study Area
- Urban Area
- First Nation Reserve
- Parks + Protected Area

Map labels: Star Blanket, Okanese, Peepeeksis, Fairy Hill, Standing Buffalo, Balcarres, Fort San, Pasqua Lake, Echo Lake, Abernethy, Echo Valley Provincial Park, B-Say-Tah, White Calf Lake Lands, Piapot, Muscowpetung, Fort Qu'Appelle, Village of Lebret, Pasqua, Mission Lake, Sandy Beach, District of Katepwa, Taylor Beach, Carry the Kettle, R.M. North Qu'Appelle, Katepwa South, Edenwold, Edgeley, Qu'Appelle, Indian Head, Trans-Canada Highway

Figure 3.5. Visibility From Lakes

Legend
Low or None
Medium
High
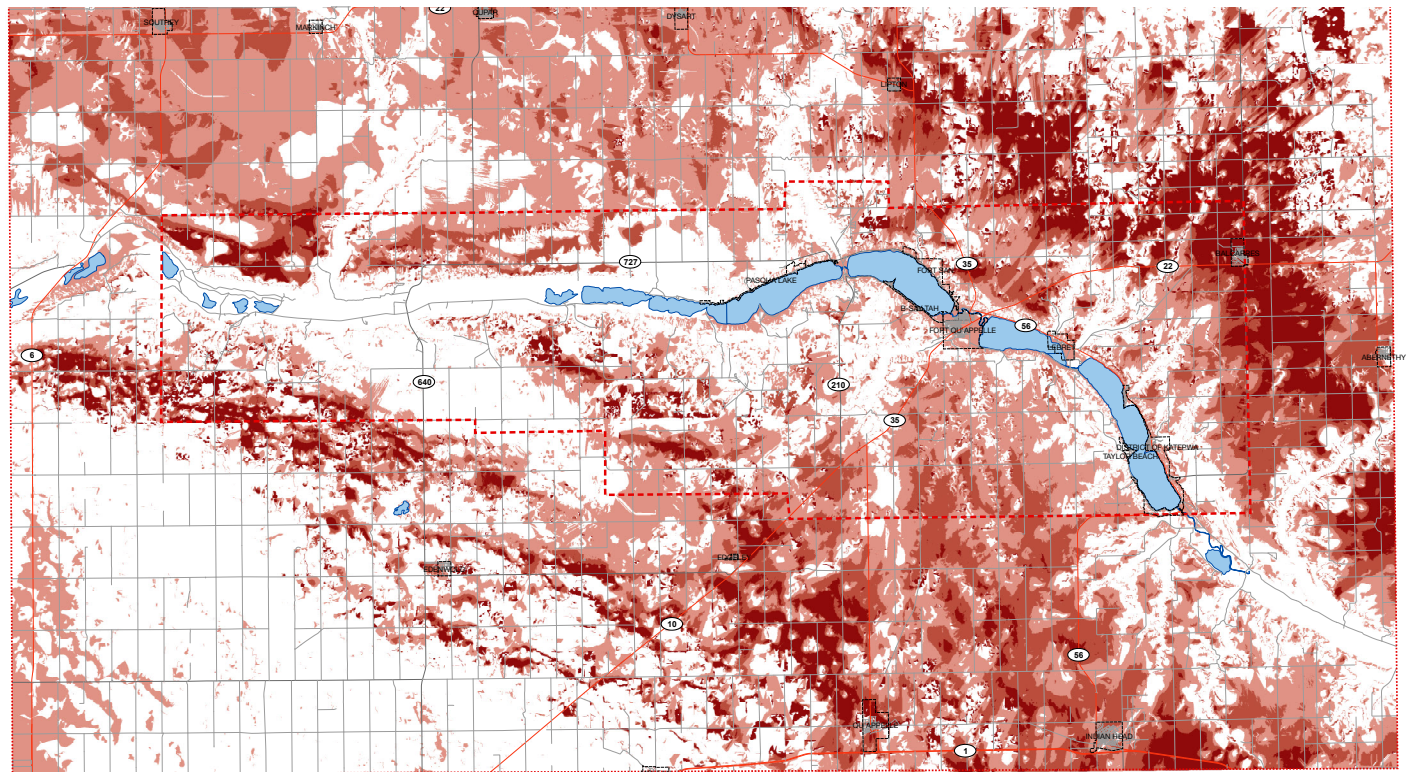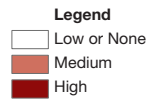
Figure 3.4. Visibility From Scenic Corridors

Legend
Low or None
Medium
High
Very High

+
Treaty Four Monument

+
Standing Buffalo Indian Powwow

+
Hudson's Bay Company Store

+
Grand Trunk Pacific Railway Station

3.3. Aboriginal Tourism Features

Aboriginal tourism features in the Qu'Appelle Valley include cultural events, monuments and facilities. A total of three powwows are held in the region, attracting visitors from Regina and beyond. In terms of facilities currently supporting tourism activities, the region counts two powwow grounds, the Treaty Four Governance Centre, the Treaty Four monument, the Wapiimoostoosis TeePee Camp/B&B and the Takoza Tipi Camp. In addition, some local museums showcase First Nations artifacts, such as the Fort Qu'Appelle Museum.

Table 3.1. Aboriginal Tourism Features in the Qu'Appelle Valley

Events	Monuments/Facilities
Standing Buffalo Indian Powwow	Treaty Four Monument
Treaty Four Celebration and Powwow	Treaty Four Powwow Grounds
Carry the Kettle Indian Powwow	Treaty Four Governance Centre
Piapot Cree Indian Powwow	Wapiimoostoosis TeePee Camp/B&B
	Takoza Tipi Camp
	First Nations artifacts in local museums

The number of aboriginal tourism features is low given the high proportion of aboriginal peoples living in the Qu'Appelle Valley. Currently, the powwow celebrations are the most well-known events. These events are marketed and advertised in the Aboriginal Tourism Guide published by Tourism Saskatchewan.

3.4. Cultural Heritage Features

Cultural heritage comprises built and intangible elements. Built heritage includes historic buildings and places while intangible culture focuses on elements that cannot be touched, such as song, music, legends, skills, crafts, and the other parts of culture that can be recorded.

3.4.1. Built Heritage

The Qu'Appelle Valley counts much evidence of its rich history. Built heritage in the region includes buildings and sites that showcase architectural, historical, cultural, archaeological, paleontological, and aesthetic value. Heritage designations under the *Provincial Heritage Property Act* or at a federal level explicitly recognize the value of these places. The region features 10 heritage buildings or sites that are protected at municipal, provincial and national levels. A list of designated built heritage is provided in Table 3.2.

Table 3.2. Heritage Buildings and Sites

Heritage Building and Site	Location	Type of Recognition	Current Use
Fort Qu'Appelle National Historic Site of Canada	Fort Qu'Appelle	National Historic Site of Canada	Museum
1897 Hudson Bay Company Store	Fort Qu'Appelle	Provincial Heritage Property	Business offices
Old Central School	Fort Qu'Appelle	Municipal Heritage Property	Qu'Appelle Valley Centre for the Arts
Indian Hospital	Fort Qu'Appelle	Federal Heritage Building	When this report was produced, the building was planned for demolition. Opportunities for interpretation on the history of the site are currently being explored.
Grand Trunk Pacific Railway station	Fort Qu'Appelle	Municipal Heritage Property	Fort Qu'Appelle Visitor Centre
Fort Qu'Appelle Sanatorium (Echo Valley Conference Centre)	Fort San	Municipal Heritage Property	Pending
Sacred Heart Parish, Rectory and The Stations of the Cross	Lebret	Municipal Heritage Property	Religious
All Saints Anglican Church	Katepwa Beach	Municipal Heritage Property	Religious
Touchwood Hills Trail Provincial Historic Site	Lipton (North of Fort Qu'Appelle)	Provincial Historic Site	Historic Site – Tourism Attraction
Government Building	Fort Qu'Appelle		Bank, Pasqua Economic Development, and other business offices

Heritage sensitive sites

There is a significant amount of land throughout the study area that is considered as heritage sensitive areas but has not been designated as heritage property. (Figure 3.6) The heritage sensitive data (Parks, Culture and Sport, Government of Saskatchewan) provides a powerful planning tool to municipalities as the protection of these sensitive sites has become an accepted step in the development review process.
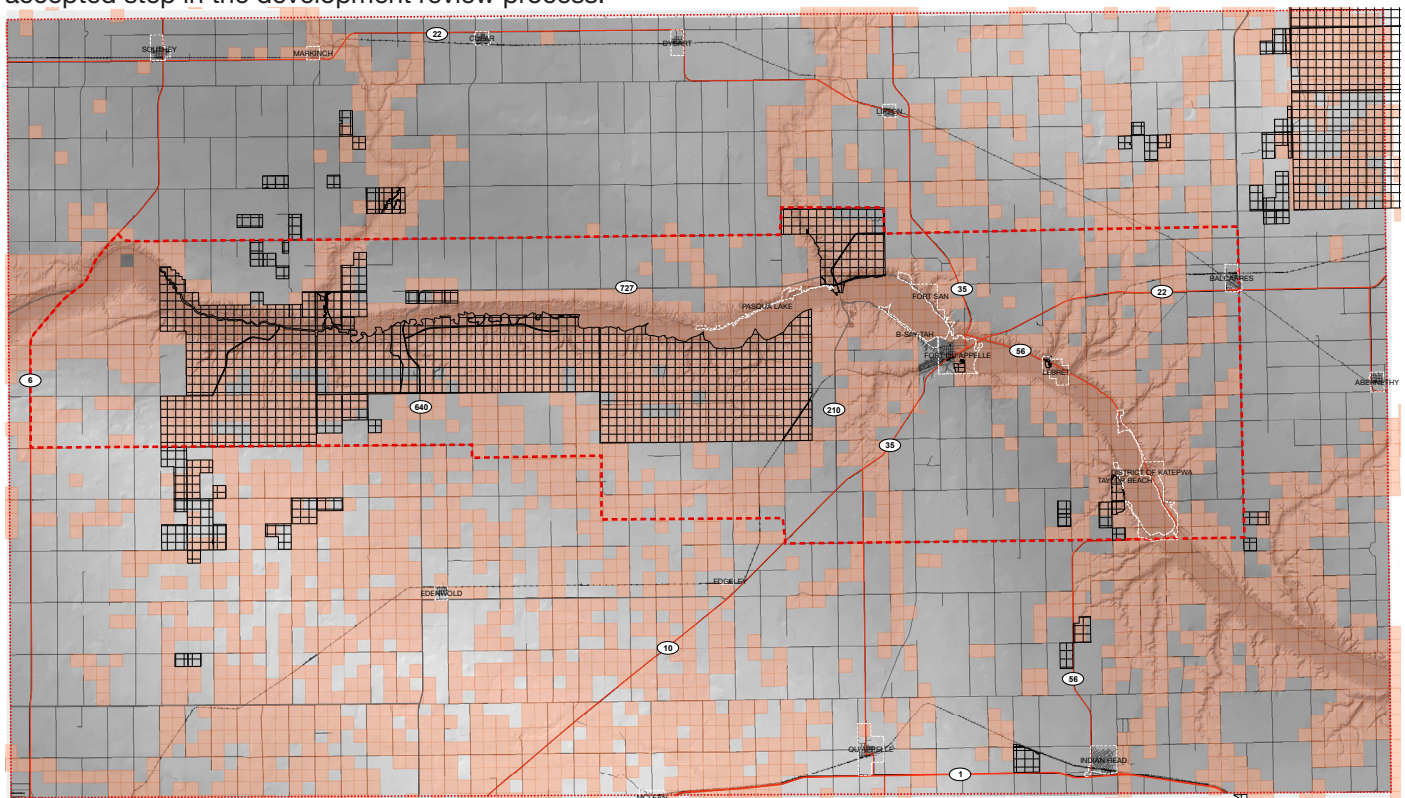
Figure 3.6. Heritage Sensitive Sites

Legend
Heritage Sensitive Sites
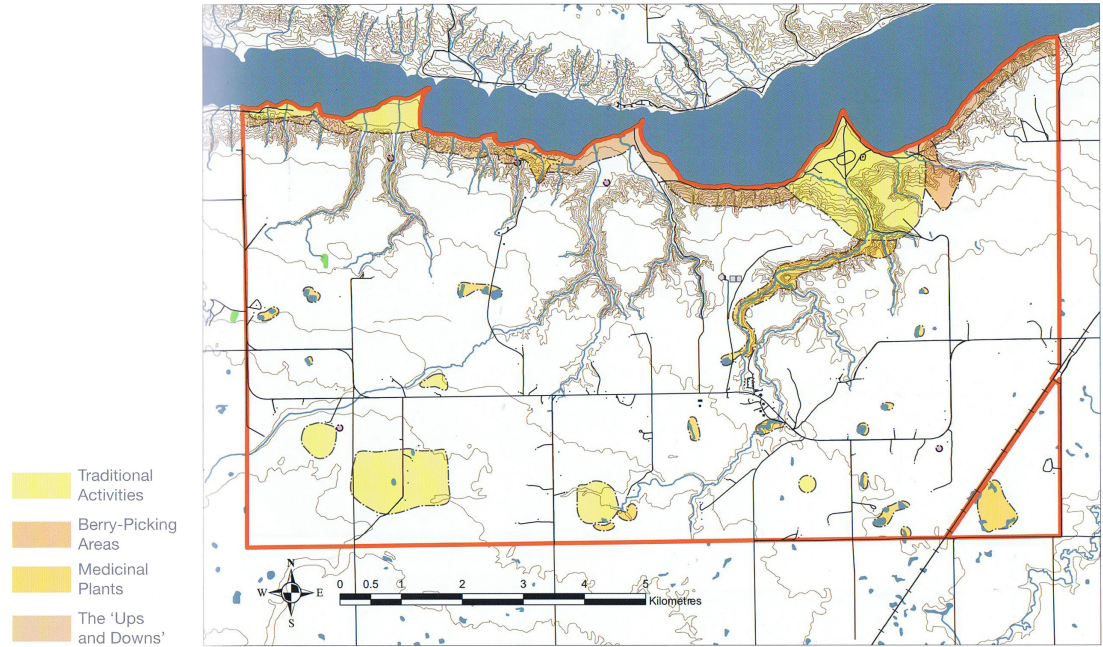
Figure 3.7. Culturally Sensitive Areas - Pasqua First Nation Reserve
Source: Cities & Environment Unit, 2009.

Legend (Figure 3.7):
- Traditional Activities
- Berry-Picking Areas
- Medicinal Plants
- The 'Ups and Downs'

Legend (Figure 3.8):
- Cultural Areas
- Burial Sites
- Sweet Grass
- Buffalo Pasture
- Waterbody
- Watercourse
- Reserve Boundary
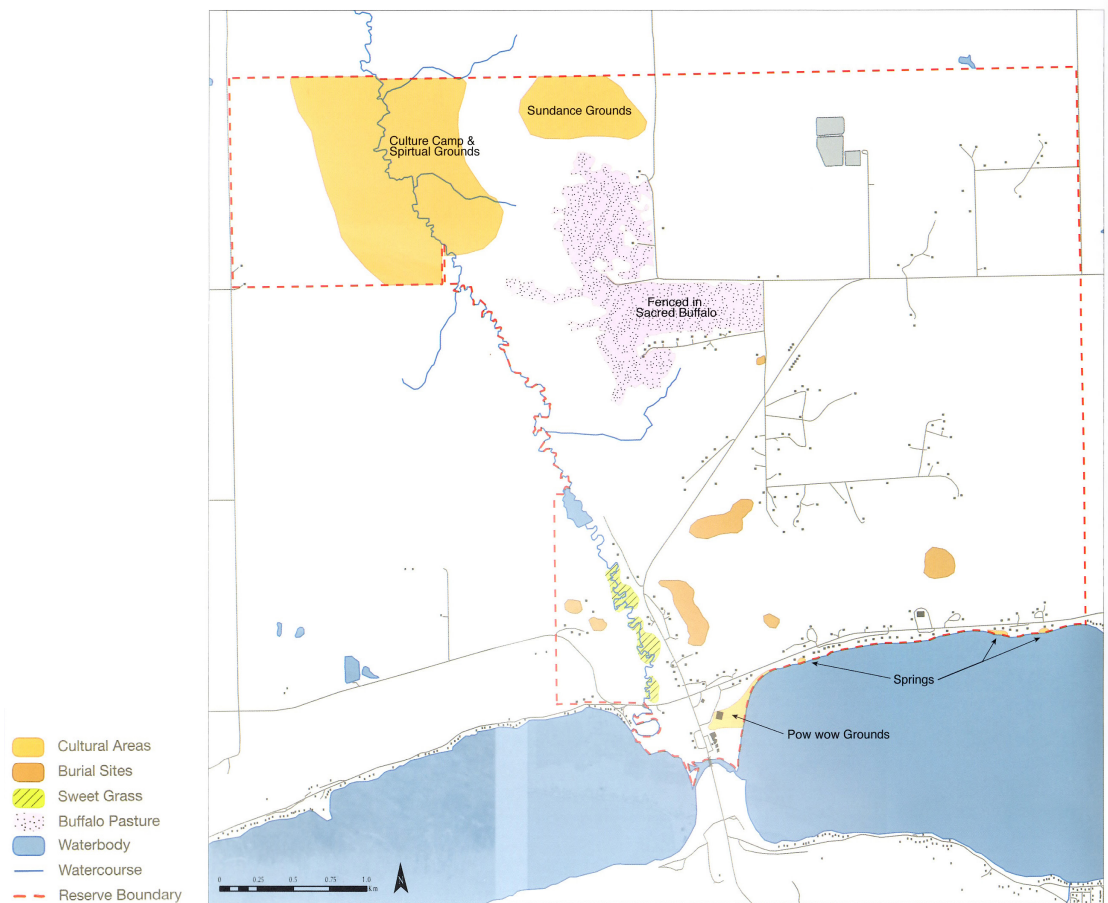
Figure 3.8. Culturally Sensitive Areas - Standing Buffalo First Nation Reserve
Source: Cities & Environment Unit, 2010.

Culturally Significant Areas

Many areas in First Nation communities are considered special. These areas are used for traditional cultural and learning activities such as dance, culture camps, hunting, berry-picking, and the harvesting of medicinal plants and should be respected and protected. Tourism activities will not be acceptable in all these areas, but some sites might present opportunities. Pasqua and Standing Buffalo First Nations have mapped these areas as part of the development of their community plans. (Figure 3.7 and 3.8)

3.4.2. Intangible Heritage

The cultural history of the First Nations in the Qu'Appelle Valley is most richly captured by oral tradition. The stories, cultural values, rituals and celebrations that have been passed down through generations are recognized as "intangible heritage", those cultural processes that are experienced as a moment and not physically represented as a built or natural artifact. The best known intangible heritage feature in the Qu'Appelle Valley is the powwow, an event where aboriginal people meet to dance, sing, socialize, and honor their culture.

Consultation with First Nations emphasizes the importance of celebrating these intangible features and finding new and innovative ways to share their stories. An approach to sharing intangible heritage is to emphasize that cultural learning is ongoing, a series of extended moments that build and shape each other as a living process. An excellent example is the very name "Qu'Appelle", inspired by a Cree saying that at once describes the place and gives it a storied name. A second approach is to find representative vignettes of intangible cultural moments such as photos, recordings and installations of oral traditions. The song "Qu'Appelle Valley, Saskatchewan" by Buffy Sainte-Marie is a powerful example of how the meaning of a place is shaped and rooted in cultural tradition.

"You can travel all alone, or you can come with me" – Qu'Appelle Valley, Saskatchewan, song by Buffy Sainte-Marie
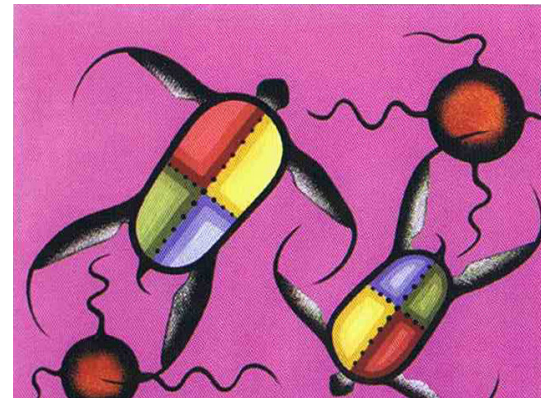
+
Celebrating Friendship by Richard Riel Dubois

+
Indian Powwow in Qu'Appelle Valley

+
Hunting

Trans Canada Trail, Katepwa

Lebret Sacred Church

Fort San

3.5. Recreation + Tourism Features Database

An inventory of recreation and tourism features provides a comprehensive list and a spatial understanding of the biophysical, amenity, cultural and historical features that support recreation and tourism activities. The database has been assembled according to the methodology described below, and verified for completeness by stakeholders. The results and an assessment analysis based the data is also presented.

3.5.1. Mapping + Database Methods

Tourism Saskatchewan provided the base data, geographic information that spatially referenced the type and location of features, and contact information. The information was compiled into a comprehensive database, which was supplemented and checked by Internet research and the careful review of tourism guides. Feedback from stakeholders was gathered during a stakeholder workshop and with the use of an innovative online tool editor.

The database is structured into 12 categories and is comprised of three types of shapes (point, polygon, line). The significance of the recreation and tourism features were evaluated using a rating system based on six ratings: scarcity, sensitivity, uniqueness, usage intensity, activity attraction and accessibility.

3.5.2. Inventory

A total of 115 features were captured in the study area, with an additional 43 in the extended study area. The recreation and tourism features count is listed in Table 3.3. Figure 3.9 presents the distribution of the recreation and tourism features while Figure 3.10 presents the features in the communities of Fort Qu'Appelle, Katepwa and Lebret.

Table 3.3. Recreation + Tourism Features Inventory

Categories	# of Features		
	Study Area	Extended Study Area	Total
Routes (points)	17	11	28
Routes (lines)			
Accommodations (points)	19	7	26
Cultural (points)	9	6	15
Sports Facilities (points)	20	1	21
Landform (points)	2	-	2
Water Features (areas)	4	-	4
Vegetation (areas)	-	-	-
Wildlife (areas)	-	-	-
Historical (points)	11	3	14
Archeological/Palaeontological (points)	0	1	1
Recreation/Tourism Areas (areas)	-	-	-
General Tourism (points)	33	14	47
Total	**115**	**43**	**158**

3.5.2.1. Accommodations

A total of 20 accommodations establishments were identified. To gain a better sense of accommodation supply, an inventory of the type of accommodation and number of rooms, beds, cabins or sites was prepared. Results of the inventory are shown in Table 3.4.

Analysis of the inventory suggests that:

- While there is some diversity of accommodation in the region, there is an absence of a major hotel/conference centre and four-season resort.
- Some establishments are outdated.
- There is a large number of camping facilities, however demand for the facilities is high.
- Online capacity is not well developed, and it is difficult to make reservations and find information on the Internet.

+
Echo Valley Provincial Park Campground

+
Caslte Bed and Breakfast, Fort Qu'Appelle

+
Valley Centre Cabins, Fort Qu'Appelle

Table 3.4. Accommodations

Accommodations	Rooms	Beds	Cabins	Sites
Hotel/Motel/B&B				
BraeBurn Inn	9			
B-Say-Tah Point Bed & Breakfast	2			
Calling Lakes Inn	-			
Castle Bed & Breakfast	1			
Country Squire Inn	22			
Hillcrest Inn	11			
Katepwa Beach Resort Hotel	5			
Cabin				
Sunday Log Cabins			4	
Valley Centre Cabin Rentals			4	
Other private cabins			5	
Campground				
Echo Valley Provincial Park				310
Fort Qu'Appelle Campground				84
Katepwa RV Park Ltd. (private)				-
South Katepwa RV Park				45
Wapiimoostoosis TeePee Camp/B&B				-
Camp/Retreat Centre				
Calling Lakes Centre	25	54		
Camp Lutherland	14	70		
Camp Monahan		56		
Orthodox Christian Centre		50		
Takoza Tipi Camp				
TOTAL	**89**	**230**	**13**	**439**

3.5.2.2. Recreation + Tourism Events

The Qu'Appelle Valley hosts a series of events that attracts tourists from the region and beyond. Table 3.5 presents a list of these events. A total of 20 events are held in the region throughout the year, with the majority being summer events. The most notable events are the Treaty Four Celebrations and powwows. The majority of events are related to sports, recreation and fair/exhibition.

Table 3.5. Events

Typical Time of Year	Events	Location	Culinary	Culture/History	Fair/Exhibition	First Nation/Métis	Performing Arts	Sporting/ Recreation	Visual Arts/Craft	Western
February	Winter Festival	Fort Qu'Appelle						X		
March	Sasktel Jibfest Snowboard competition at the Mission Ridge Winter Park	Fort Qu'Appelle						X		
March	Katepwa and District Lions Club Ice Fishing Derby	Katepwa Beach						X		
May	Clearview Arena High School Rodeo	Fort Qu'Appelle						X		X
May	Fort Qu'Appelle Lions Echo Lake Road Race – Canadian Road Races Series	Fort Qu'Appelle						X		
May	Zombie Prep Camp	Katepwa	X		X		X	X	X	
June	Angler & Young Angler Walleye Championship Tournament (suspended)	Fort Qu'Appelle						X		
July	Qu'Appelle Valley Artists Show & Sale	Lebret			X				X	
July	Peepeekisis Firt Nation Traditional Powwow	Peepeekisis First Nation			X	X				
July	Abernethy Agricultural Fair & Exhibition	Aberrnethy			X					X
August	Standing Buffalo Dakota First Nation Powwow	Fort Qu'Appelle				X	X			
August	Saskatchewan Team Roping Association Finals	Fort Qu'Appelle						X		
August	Midsummer's Art Festival	Fort Qu'Appelle			X				X	
August	Creekside Country Gathering	Qu'Appelle						X		X
August	Motherwell Homestead NHS Reaping Hope – Binging + Stooking	Abernethy		X	X			X	X	
August	Piapot Cree Indian Powwow	Piapot				x	X			
August-September	Fort Qu'Appelle Walleye Tournament	Fort Qu'Appelle (Katepwa Point Provincial Park)						X		
September	Motherwell Homestead NHS Harvesting the Legacy – Threshing	Abernethy		X	X			X		
September	Balcarres Threshing Day	Balcarres		X						
September	Treaty 4 Celebrations and Powwow	Fort Qu'Appelle				X	X			
October	Craft and Trade Show and Sale	Balcarres			X				X	

SOUTHEY
MARKINCH
CUPAR
DYSART
LIPTON
BALCARRES
PASQUA LAKE
FORT SAN
B-SAY-TAH
FORT QU'APPELLE
LEBRET
ABERNETHY
DISTRICT OF KATEPWA
TAYLOR BEACH
EDENWOLD
EDGELEY
QU'APPELLE
INDIAN HEAD

Legend

- ● Accommodation Features
- ● Archaeological Features
- ● Cultural Features
- ● Facility Features
- ● General Tourism Features
- ● Historical Features
- ● Landform Features
- ● Route Features
- ● Water Features
- — Routes
- — Scenic Drive
- – – Mixed Multi-useTrail
- ▱ Water Feature
- ▭ Study Area
- ▭ Extended Study Area
- — Major Highways
- — Other Roads
- ╀ Railway
- ▨ Parks
- ▨ First Nations Reserve
- ▨ Municipal Boundaries
- ▨ Waterbodies

0 1 2 4 6 8 10 km.

The Qu'Appelle Valley INTEGRATED TOURISM STRATEGY

Figure 3.9. Recreation + Tourism Features Inventory

The Qu'Appelle Valley Integrated Tourism Strategy |

FORT QU'APPELLE

Fort Qu'Appelle Campground
Echo Lake Beach
Echo Lake Boat Launch
Valley Centre Cabins
Golf 4 Cancer
Hillcrest Outfitters
Hillcrest Inn
Snowmobile Fuel Site
Winter Festival
Mid Summer's Art Festival
Stop 3
Old Fort Qu'Appelle Hospital
Fort Qu'Appelle National Historic Site of Canada
Castle Bed and Breakfast
Fort Qu'Appelle Museum
Triple C Trailer Court
Bistro Off Broadway
Farmer's Market
Ming's Garden
Manny's Donair & Ice Cream Shop
Valley Bake & Coffee Shop
Fort Qu'Appelle Curling Rink
Snowmobile Fuel Site
Fort Qu'Appelle Rexentre
Fort Qu'Appelle Skateboard Park
Fort Qu'Appelle Tennis Court
Qu'Appelle Valley Centre for the Arts
Fort Qu'Appelle Pottery and Art Gallery
Fort Qu'Appelle Baseball Diamonds
Fort Qu'Appelle Football Field
The Prairie Winds Art Gallery
Fort Qu'Appelle Tourism Information Centre
Country Squire Inn
Grand Trunk Pacific Railway Station
BraeBurn Inn
Treaty Four Governance Centre
Treaty Four Pow Wow Grounds
Mission Ridge Winter Park
SaskTel Jibfest

LEBRET

Wapiimoostoosis TeePee Camp/B&B
Hilltop Memorial Chapel
Lebret Arena
White Calf Gym and Bingo Hall
The Little Glass Hut
Calling Lakes Inn
Sacred Heart Church
Lebret Museum
Qu'Appelle Valley Artist Show & Sale

DISTRICT OF KATEPWA

Katepwa Point Provincial Park
Katepwa RV Park Ltd.
Rocco's Beach Store
Katepwa Beach Resort Hotel
Sunday Log Cabins
Katepwa Point Provincial Park Day Use Area
Legends Are Made At Katepwa Ventures Rentals
Katepwa Boat Launch
Fort Qu'Appelle Walleye Tournament
Stop 6
Katepwa Point Provincial Park Beach

Figure 3.10. Recreation + Tourism Features Inventory (Fort Qu'Appelle, Katepwa and Lebret)

3.5.3. Tours + Packages

Internet research was undertaken to identify tours and packages available in the area. A total of five tours and packages were identified. Stakeholders further suggested that several self-guided tours exist, but are not currently marketed. Tours and packages currently being marketed are listed in Table 3.6.

Table 3.6. Tours + Packages

Packages	Tours
The Fall Colours of the Qu'Appelle Valley Roundtrip from Winnipeg or Portage La Prairie with overnight in Melville (4 days-3 nights) Provided by Rail Travel Tour www.railtraveltours.com	**Qu'Appelle Valley Cycling Tours** Two self-guided circuits: • Echo Valley – Motherwell Homestead Tour (88 km return) • Echo-Katepwa Tour (90 km return) www.saskcycling.ca
Sundays Log Cabins Play & Stay Package One night of accommodation and one 18-hole round of golf Information provided on Tourism Saskatchewan website	**Qu'Appelle Valley Snowmobile Tour** Circuits based on an organized event held in 2009
	Geolog Tour Self guided tour to discover the unique geology of the region. Maps and information are provided on the Geolog Tour website. Tour developed by the Centre for Mathematics, Science and Technology Education of the University of Regina, www.cmste.uregina.ca

3.5.4. Recreation + Tourism Features Significance Assessment

The significance of the recreation and tourism features compiled in the inventory was assessed using six criteria: scarcity, sensitivity, uniqueness, usage intensity, activity attraction and accessibility.

Scarcity: Scarcity is a relative measure of the occurrence of the feature type.

Sensitivity: Sensitivity is a subjective rating of the relative vulnerability of the feature to alteration or destruction caused by landscape change from disturbance, development, or over-use.

Uniqueness: Uniqueness is a subjective rating of the distinctiveness or unusual characteristics of a feature from others of the same type.

Usage Intensity: Usage Intensity is a subjective estimate of the relative level of recreation and tourism use of a feature compared to other features of the same type.

Activity Attraction: Activity Attraction is an estimate of the current attraction capability of a feature.

Accessibility: Accessibility is a subjective rating of the nature and ease of access to the feature.

The significance assessment strengthens the understanding of recreation and tourism features in the Qu'Appelle Valley as whole. The assessment indicates that features are generally highly used, suggesting that a large number of people are visiting the same features. Similarly, more than half the features have a high to moderate activity attraction. Features are easily accessible, however a number of them are highly or very highly sensitive. These findings are consistent with rates of scarcity and uniqueness. Many tourism features are common across the region, with only a small number of scarce features that differentiate the tourism market. Similarly, the majority of features exhibit a low level of uniqueness, with only a few that are very highly unique or highly unique such as Fort San or the Treaty Four monument and grounds.

The analysis identifies two potential opportunities that are addressed in more detail in Chapter 5. First, ensure that the supply of highly used features is strong enough to support demand, and undertake measures to increase supply if necessary. A corollary is to ensure that sensitive features are not negatively impacted by high rates of visitation or use. Second is the opportunity to develop new niche markets to take advantage of scarce and highly unique features.
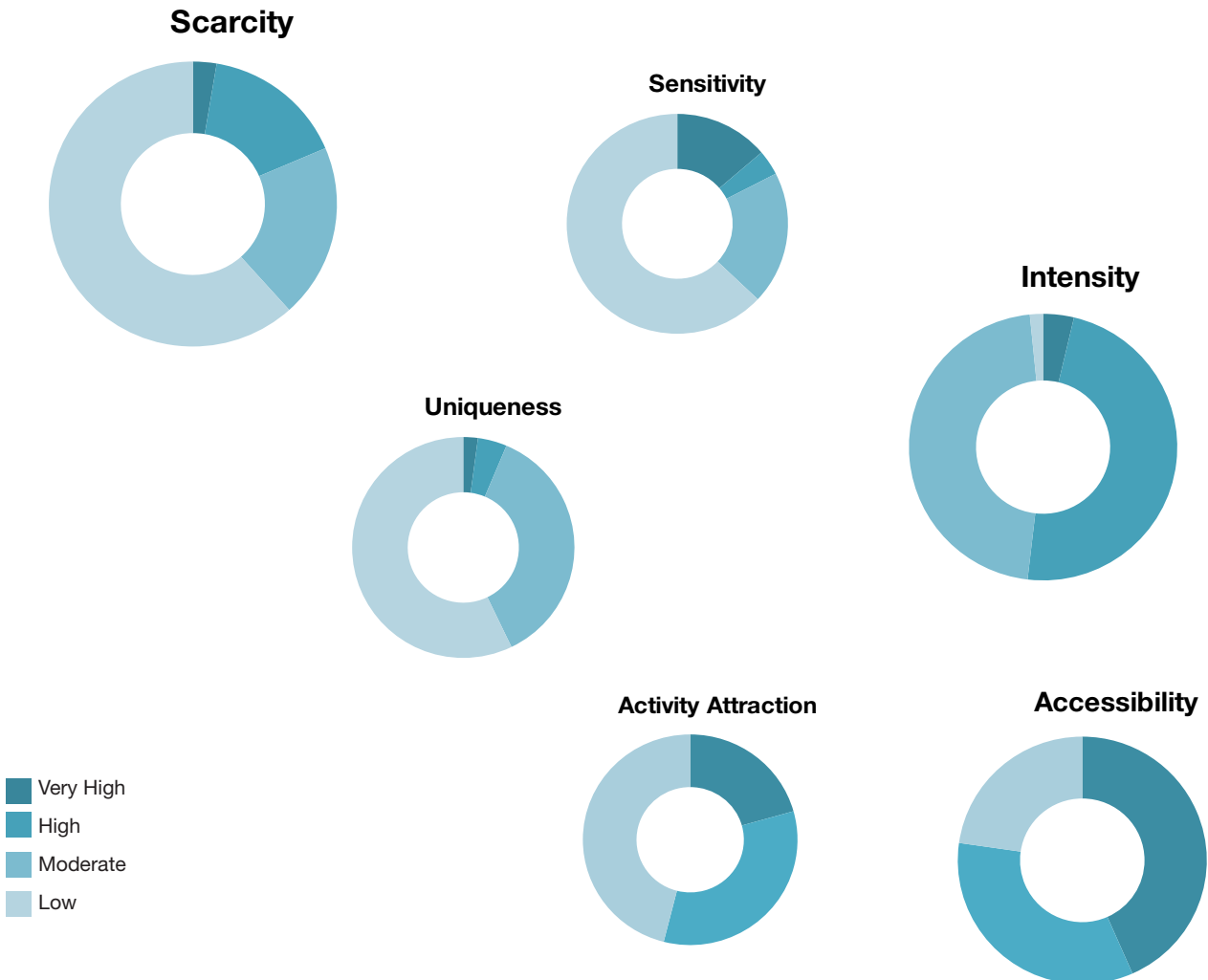
Scarcity

Sensitivity

Intensity

Uniqueness

Very High

High

Moderate

Low

Activity Attraction

Accessibility

Figure 3.11. Recreation + Tourism Features Significance Assessment

3.6. Recreation + Tourism Opportunity Spectrum

A recreation and tourism setting is the context in which activities occur. Settings are influenced by the spectrum of remoteness, naturalness, social and managerial characteristics of an area and play a significant role in a recreation or tourism experience. For instance, camping in a front-country location with motorized access, high usage intensity and relatively modified landscapes provides for a very different visitor experience than camping in a backcountry location that is remote and challenging to access, affords few comfort amenities, low volumes of use and a near natural landscape.

Methodologies exist to map the diversity of settings. The Recreation and Tourism Opportunity Spectrum (ROS) is a mapping method which employs objective and quantifiable measures to delimit the recreation settings. It uses a classification system in which conditions that differentiate between recreation and tourism settings, such as accessibility, the degree of development, and the presence of management and other visitors are organized along a spectrum. At one end of the spectrum are settings that are highly developed, with lots of facilities, relatively high numbers of visitors, and visible presence of management. At the other end, there is very little or no development, little management presence, and very few encounters with other visitors as illustrated in Figure 3.12.

The mapping of the settings in the Qu'Appelle Valley revealed that there is little variation due to road access and agricultural lands that provide long range views. A few pockets of front-country settings lie within the First Nations reserves of Pasqua, Muscowpetung and Piapot due to higher presence of tree stands. Some areas of mid-country settings were identified in the extended study area in the First Nation reserve of Okanese and Peepeeksis.

Each recreation and tourism setting found in the Qu'Appelle Valley region is defined below, and its spatial distribution is illustrated in Figure 3.13.

Mid-country - Setting III - Setting III represents landscapes that are modified to a small degree, accessible by motorized vehicles (via unimproved roads or trails) supportive of both motorized and non-motorized recreation and tourism activities. Evidence and interaction with other visitors and management controls exist, however they are limited. This setting affords the visitor a lessened sense of isolation from civilization and a moderate degree of risk and personal challenge.

Front-country - Setting IV - This is a relatively natural appearing setting; a higher degree of human modifications may exist but, for the most part, blend with the surroundings. Recreation and tourism infrastructure and management controls may be evident, as could be resource development activities. The area is easily accessible and evidence and interaction with other visitors is common. Motorized and non-motorized activities can occur. This setting affords visitors fewer opportunities to experience solitude.

Front-country - Setting V - Setting V represents a substantially modified landscape with obvious development and resource use. These landscapes typically surround population centers and may involve intensive agriculture

and ranching operations; they also represent areas of high intensity resource development. Recreation and tourism infrastructure and management controls are common and desired. Motorized and non-motorized activities occur. Evidence and interaction with other visitors and management is frequent. Visitors may experience some modern conveniences and a feeling of security from personal risk.

Developed - Setting V1 - This setting is dominated by human development. Recreation and tourism infrastructure and management controls are extensive, elaborate, and desired. Large numbers of users are expected and the sights and sounds of others dominate. The visitor may experience numerous modern conveniences, interaction with management in manicured environments and a feeling of high security from personal risk.

These pockets of mid-country and front-country present opportunities for activities in which a higher level of remoteness and isolation is desired such as horseback riding and camping. Results of the ROS analysis can be used in land-use planning decision to maintain a diversity of setting for example.

Backcountry		Mid-country	Front-country		Developed
Setting I	Setting II	Setting III	Setting IV	Setting V	Setting VI

Recreation + Tourism Opportunity Spectrum

Figure 3.12. Recreation + Tourism Opportunity Spectrum
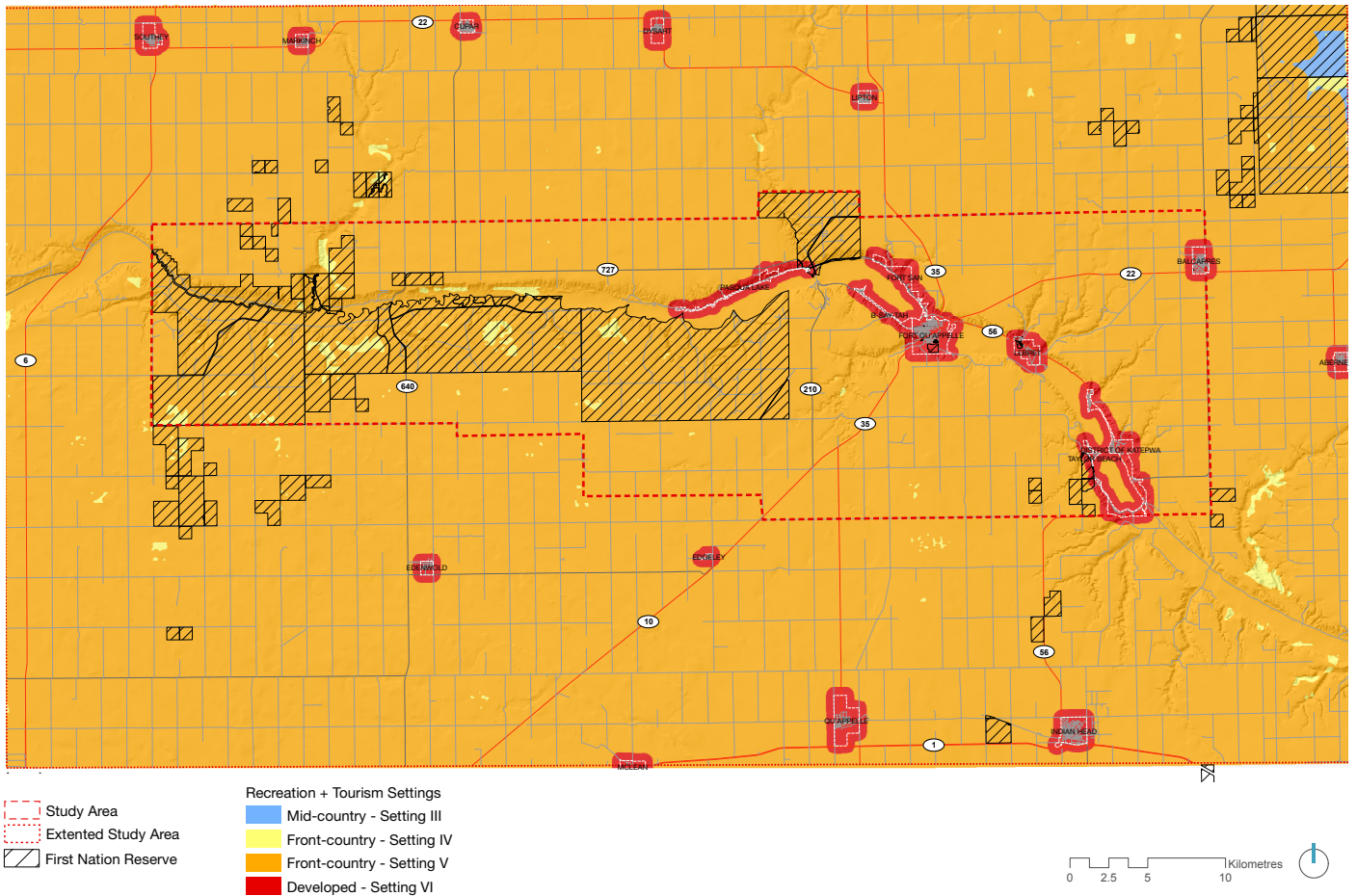
Figure 3.13. Recreation + Tourism Setting Opportunity Spectrum

Legend:
- Study Area
- Extented Study Area
- First Nation Reserve

Recreation + Tourism Settings
- Mid-country - Setting III
- Front-country - Setting IV
- Front-country - Setting V
- Developed - Setting VI

3.7. Significant Tourism Areas

The significant tourism areas within the Qu'Appelle Valley, from a supply-side perspective, were identified by integrating the results of the analysis. These areas include locations that currently support dynamic tourism activities and areas that have the potential to support tourism activities and contribute to the success of the Qu'Appelle Valley as a tourism destination. Significant tourism areas within the study area are presented in Table 3.7 and Figure 3.14.

Table 3.7. Significant Tourism Areas

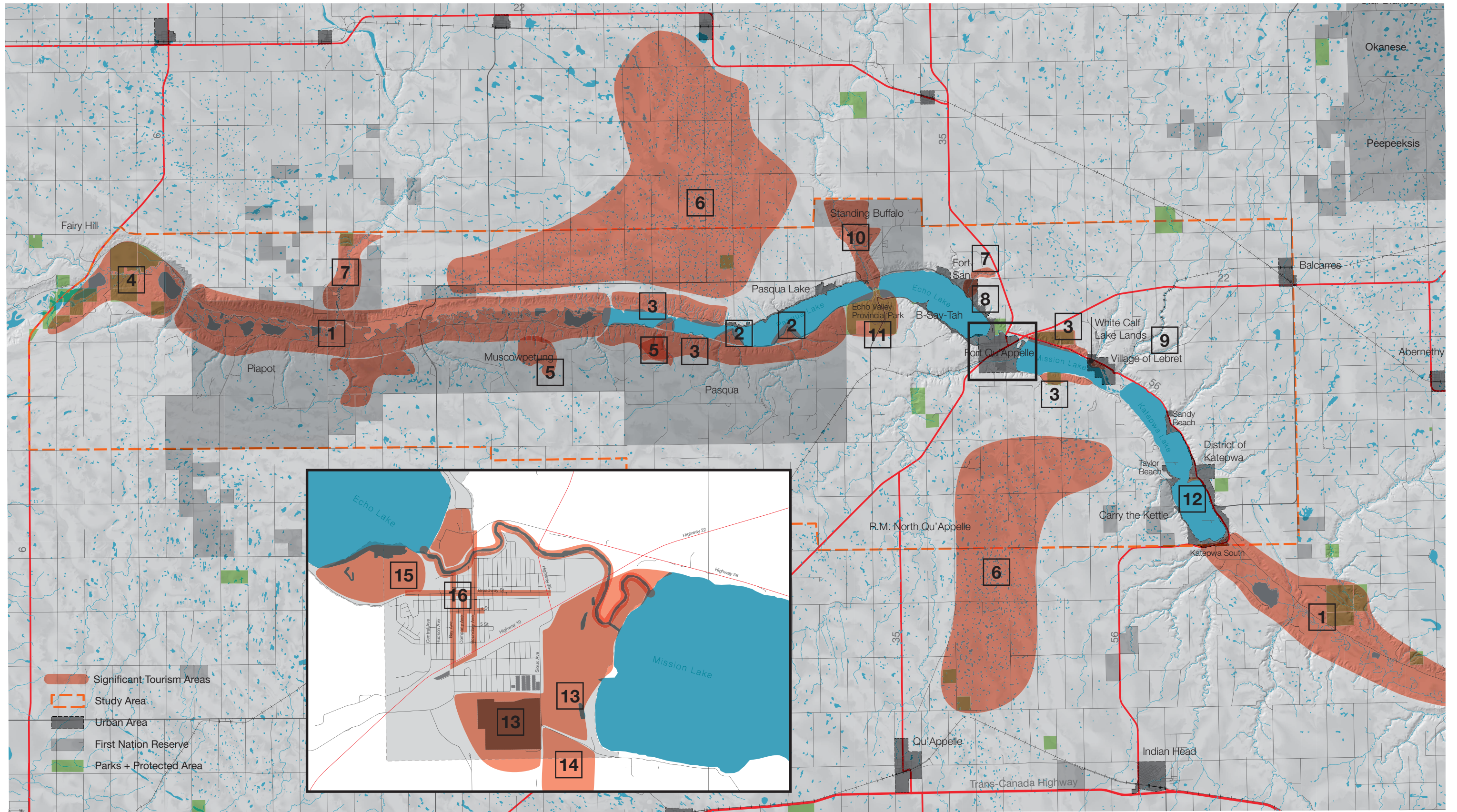| Significant Tourism Areas	Why?
1. Qu'Appelle River Valley corridor (refer to mesic river valley landscape unit)	• Important ecological infrastructure • Potential for recreational trails and blue way
2. Sand pits on First Nation reserve lands (Asham's Point, Leader's Point and Antipas Point) (refer to sand pit landscape unit)	• Culturally significant areas (traditional activities) • Flat topography can support a certain level of development without affecting the landscape • Lakefront lands
3. Forested lakefront slopes (refer to landscape units)	• The forested lakefront slopes provide the background landscape of the valley and should be protected from development • Slopes > 15% unsuitable for development • Potential for recreational trails
4. Wildlife habitat protected areas (east of Highway 6)	• Important ecological infrastructure • Potential for wildlife watching and interpretation
5. Mid-country setting on First Nation reserve lands (refer to recreation and tourism opportunity spectrum)	• These areas have a greater potential to provide a sense of remoteness
6. Kettle lakes and prairie potholes (refer to landscape units)	• Important ecological infrastructure • Potential for nature-based tourism (hunting, wildlife watching, etc.)
7. Coulees (refer to landscape units)	• Important ecological infrastructure • Slopes > 15% unsuitable for development • Potential for recreational trails to access the plateau
8. Fort San (historical buildings and site)	• Historic buildings and site • Potential for resort development • Proximity to water access
9. White Calf Lake Lands and the Village of Lebret	• First Nation reserve and village with a rich history • First Nation reserve land can support a certain level of development without affecting the landscape • Lakefront land • Land serviced • Existing amenities and services in the Village of Lebret
10. Standing Buffalo lakeshore lands along Highway 56 and coulee	• Culturally significant areas (traditional activities) • Community hub • Powwow celebration ground • Lakefront Lands • Proximity to the Echo Valley Provincial Park
11. Echo Valley Provincial Park	• Very high activity attraction • Existing facilities • Water access (beach + boat launch)
12. Katepwa Point Provincial Park and adjacent commercial lands	• Very high activity attraction • Existing facilities • Water access (beach + boat launch) • Proximity to commercial zoning
13. Treaty Four Governance Centre and Powwow Ground, and adjacent lands	• Important cultural event site • Lakefront lands • Proximity to Treaty Four Governance Centre
14. Mission Ridge Winter Park and adjacent lands	• Closest ski hill to Regina • Scarce feature • Proximity of lakefront lands • Potential to provide four seasons activities
15. Indian Hospital historic building and adjacent lands	• Indian Hospital designated heritage building • Lakefront land • Proximity to main street downtown • Important ecological infrastructure (adjacent lands)
16. Downtown Fort Qu'Appelle	• Main street with commercial retail stores and services • Concentration of historic buildings and sites • Museum and art centre • Lakefront lands and the Qu'Appelle River • Proximity to campground • Streets connecting to tourism features

Figure 3.14. Significant Tourism Areas

Legend:
- Significant Tourism Areas
- Study Area
- Urban Area
- First Nation Reserve
- Parks + Protected Area

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4. Tourism Market Analysis

A high level tourism market analysis was undertaken, including an overview of the tourism sector, the visitation and visitation spend, in the Qu'Appelle region and beyond, the current national and international market, and Aboriginal tourism market. This chapter concludes with a competitive advantage analysis.

4.1. Market Overview

Globally, the tourism sector is one of the largest and fastest-growing economic sectors in the world, with over a billion international travellers spending more than $1 trillion. According to the World Tourism Organization (UNWTO) long term forecast *Tourism Towards 2030,* international tourist arrivals worldwide is projected to increase by 3.3% a year from 2010 to 2030 to reach 1.8 billion by 2030*.

The top ten ranking of destinations in 2012 was the United States, Spain, France, China, Italy, Macau (China), Germany, United Kingdom, Hong Kong (China), and Australia (UNWTO, 2013). In 2011, Canada received 16 million travellers and was ranked 18th on the list of international tourist arrivals. The top ten rankings in international tourism expenditure was China, Germany, United States, Russia Federation, France, Canada, Japan Australia, and Italy.

In Canada, the tourism sector is one of the country's largest service sectors, representing more of Canada's gross domestic product (GDP) than agriculture, forestry and fisheries combined. Tourism makes up $78.8 billion of Canada's economic activity and is responsible for the creation of 603,400 jobs distributed across the country (TIAC, 2012). Canada's tourism industry consists of the following service industries: transportation services, hospitality services, and attractions.

In Saskatchewan, one in every nine workers (58,000 people) is employed in tourism-related jobs. The tourism sector itself is the fastest growing sector in Saskatchewan and currently ranks fourth among all industries. Of particular interest to this initiative, the majority of tourism-related employment and tourism businesses and events occur outside of the province's major cities of Regina and Saskatoon.

4.1.1. Visitation + Visitation Spending

During 2011, 1.3 million Saskatchewan residents, other Canadians, and visitors from the United States and overseas travelled in South East Saskatchewan. The overnight and same-day trips, and tourism activities by these visitors generated $103.7 million in consumer spending. In 2011, there were approximately 2,494 people employed in tourism-related industries living in the Regina Qu'Appelle Valley (Tourism Saskatchewan, 2012).

Visitation in the Regina Qu'Appelle Valley region is not specifically tracked. The most relevant data for the total Canadian visit to the Qu'Appelle Valley Calling Lakes region is the statistics from Census Division 6, from which Regina's number were removed. In 2011, the total Canadian visits and visitor spending in the Census Division 6 (excluding Regina) were:

- Total visits (same day and overnight or longer): 480,000
- Overnight or longer visits: 120,000
- Total visitor spending (same day and overnight or longer) $19.1 million
- Overnight or longer visitor spending $8.2 million

Visitation to the Provincial Parks and camping permits to Echo Valley Provincial Park (Table 4.1) are tracked. These estimates are relevant to the Qu'Appelle Valley ITS as the Provincial Parks are key attractions in the study area.

- Echo Valley Provincial Park (2011): 131,772 visits
- Katepwa Point Provincial Park (2011): 102,000 visits

Table 4.1. Camping permit days in Echo Valley Provincial Parks in 2011

	2011	% Change 2011 from 5-yr Average
Regular	3,308	-1.6
Reservation	9,714	65.1
Monthly	300	-64.0
Seasonal	12,650	0.4
Self Registration	592	236.9
School/Youth Group	697	-54.1
Total	27,261	11.9

4.2. Market

The primary tourism markets for Saskatchewan are residents from: Saskatchewan, Alberta, British Columbia, Manitoba, the United States, and overseas. In 2011, Saskatchewan had 11.5 million visits to and within the province and generated more than $2 billion in expenditures.[1] Saskatchewan residents accounted for the majority of visits and total expenditures, responsible for 69% of overnight or longer visits.[2] Alberta residents accounted for 15% of visits, followed by other Canadians, primarily from British Columbia and Manitoba. The number of international visitors to Saskatchewan was 198,400, of which 146,000 were U.S. residents. Overseas residents accounted for 1% of overnight visits and 4% of overnight expenditures.

The primary drivers for Saskatchewan residents to undertake overnight or longer visits are generally outdoor-oriented. Undisputedly, the province's biggest tourism attractions are its lakes and provincial parks. Popular tourist activities include: camping, fishing, hiking, and boating.

The majority of U.S. tourists who visit Saskatchewan are drawn to the province to hunt or fish. The other key reason for visiting the province is as a pass-through visitor, visiting Saskatchewan as part of a Western Canada or Alaska trip. The largest markets, of U.S. residents, are West North Central states, Mountain states, and East North Central states.

In relation to oversea visitors, the key driver for visiting Saskatchewan is to participate in a unique outdoor experience such as guest ranches and northern canoeing. The primary overseas market, of tourists visiting Saskatchewan, is Europe, especially the United Kingdom and Germany.

4.2.1. International Market

In 2012, Canada received 16 million international overnight visitors, up 1.7% over 2011. Spending by visitor increased by 2.3% to $12.3 billion, as they stayed longer and spent more per trip (CTC, 2012). To no surprise, the most popular period for tourists to visit Canada is during the summer months.

The Canadian Tourism Commission (CTC) identifies the following countries as key overseas markets: Americas (Mexico and Brazil), Europe (the United Kingdom (UK), Germany and France), Asia (China, India, Japan and South Korea) and Australia. While Germany, the United States, Australia and the U.K. may be considered, traditionally, Canada's strongest markets, China and India are emerging markets. It is important to emphasize that The United States is by far the Canadian tourism industry's largest customer. The dominant driver for choosing Canada as a tourism destination is nature.
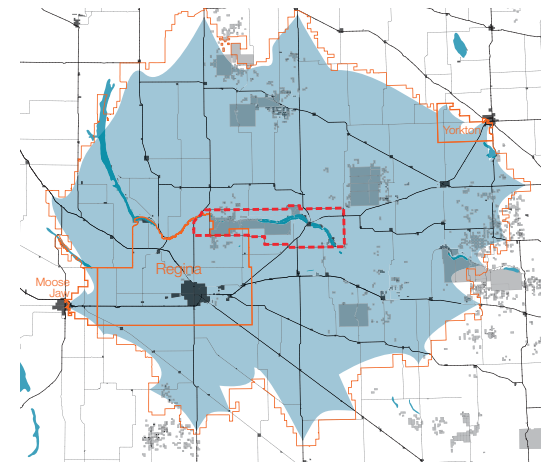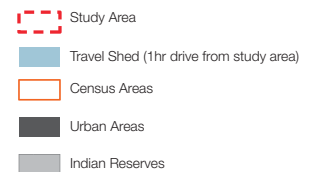

Figure 4.1. Travel Shed

- Study Area
- Travel Shed (1hr drive from study area)
- Census Areas
- Urban Areas
- Indian Reserves

Census Areas	2011 Population
Regina	210,556
Yorkton	5,115
Moose Jaw	1,717
Others	48,383
TOTAL	**265,771**

The travel shed represents the area within an hour drive from the study area. Approximately 260,000 people live within an hour of the Qu'Appelle Valley Calling Lakes region.

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1 Tourism Highlights. Tourism Saskatchewan
2 Saskatchewan residents accounted for 85% of total visits (same day and overnight or longer).
Saskatchewan residents accounted for 73% of total expenditures (same day and overnight or longer).

4.2.2. Aboriginal Tourism Market

In undertaking a high-level market analysis of the potential for Aboriginal tourism for the Qu'Appelle Valley Calling Lakes region, any reference to Aboriginal tourism assumes that the Aboriginal tourism product includes all tourism related businesses that offer an Aboriginal themed experience.

In Canada, Aboriginal Tourism is a $750 million industry (UNBC, 2007). At a national level the CTC has identified Aboriginal tourism as one of six strategic issues with potentially significant implications for Canada's tourism industry. Aboriginal tourism is complementary to the worldwide perception of Canada as a destination for tourists wanting interact with nature.

A recent CTC survey concluded that the U.K., Germany and particularly France are all strong markets for Aboriginal tourism in Canada.[3] As a tourism product, Aboriginal tourism experience, while valued, is not viewed as a trigger to visit Canada but as a value added experience. Tourists usually investigate information on Aboriginal tourism when they are at the destination. The most popular source media are the Internet, word of mouth, and magazines.

In terms of preferred product parameters, European Aboriginal experience seekers are very clear that they want authentic cultural, outdoor activities in nature. Some of the highlighted Aboriginal tourism experiences include arts and crafts (viewing and making), dancing and drumming ceremonies, powwows, local cuisine and traditional subsistence activities (fishing, hunting, trapping, gathering, use of medicinal plants). Good precedents for the Qu'Appelle Valley Calling Lakes region to learn from are Moccasin Trail Tours (www.moccasintrailsadventures.com), and The Great Spirit Circle Trail (www.circletrail.com), as both enterprises profess to offer authentic, Aboriginal experiences based on the geography, history and culture of the First Nations inhabitants.

The profile of tourists looking to participate in Aboriginal tourism experiences is generally believed to be: mature, affluent, well-educated couples that want to experience a sense of discovery.

British Columbia is currently the most advanced/developed Aboriginal tourism market. This development can be attributed to a number of factors, beginning with the high concentration of First Nations resources, the advent of the 2010 Winter Olympics in Vancouver, and the contributions of the Aboriginal Tourism Association of British Columbia (ATABC). An estimated 3.7 million tourists, in 2010, experienced some form of Aboriginal tourism when visiting B.C.[4] Saskatchewan's Aboriginal tourism sector is not as developed as that of British Columbia's. The Aboriginal Tourism Association of Saskatchewan, once charged with a similar mandate to that of ATABC, has been disbanded.

3 Aboriginal Tourism Opportunities for Canada, U.K., Germany, France. The market for Aboriginal tourism in these countries is substantial: France, 85%; Germany, 72%; The U.K., 46% (Percentage of potential travellers to Canada interested in Canadian Aboriginal products).
4 Simon Fraser University's Centre for Tourism Policy and Research

4.3. Existing Marketing Strategies

The Qu'Appelle Valley Calling Lakes region covers multiple jurisdictions and therefore multiple marketing initiatives. The following brandings and messages are currently used to promote the Qu'Appelle Valley and/or a specific area of the Qu'Appelle Valley:

- Tourism Saskatchewan: Unexpected landscapes under sunny skies (South East Region)
- Calling Lakes Planning District : 4 Lakes, 4 Seasons, 4 Everyone
- The Town of Fort Qu'Appelle: Slow Down, Enjoy the Valley!
- The Village of Lebret: Welcome to Paradise

These branding initiatives do not include important elements the Qu'Appelle Valley has to offer in term of history and culture, and highlights a need for a common brand strategy. This consistency will promote integrity of the Qu'Appelle Valley through a unified message.

4.4. Competitive Advantages

A competitive advantage analysis identifies the potential differences between tourism destinations that would draw from the same visitor pool. The tourism destinations selected to assess the competitive advantage of the Qu'Appelle Valley are Regina Beach and surrounding areas and Lake Diefenbaker. The information is organized around seven topics (Table 4.2). These topics are:

- Natural environment
- Access + infrastructure
- Features, products + facilities
- Hospitality + capacity
- Marketing
- Business + services

Table 4.2. Qu'Appelle Valley Tourism Destination Competitive Advantage

	Qu'Appelle Valley Calling Lakes Region Advantages (Approximately 1,200 km²)	Regina Beach (and Last Mountain Lake area) (Regina Beach - Approximately 3 km²)	Lake Diefenbaker (Approximately 17,400 km²)	Assessment
Natural Environment	• The Qu'Appelle Valley contains rolling parkland with a large proportion of undisturbed landscape, native vegetation and high quality wildlife habitats. The region's unique geology contains natural and cultural landscapes of high value. The Qu'Appelle Valley is rich in history and culture.	• Regina Beach, a resort village, has been a summer destination since the early 1900s and has one of the best beaches in all of Southern Saskatchewan.	• It's a very big lake with almost 800 km of shoreline. • Lake Diefenbaker is the most popular angling waterbody in Saskatchewan (1995 Sport Fishing Survey, SERM) with some of the highest concentrations of game fish in the province.	The natural environment of the Qu'Appelle Valley Calling Lakes region is exceptional. The natural landscapes provide the region with a unique opportunity to differentiate itself from other tourism destinations.
Access + Infrastructure	• 70 km (1 hr.) NE of Regina	• 45 km (40 min.) NW of Regina	• 270 km (3 hrs.) NW of Regina	The transportation infrastructure of The Qu'Appelle Valley Calling Lakes region can be improved upon to include a complete road network around the four lakes. Ideally, this network would be able to accommodate tour buses. The Qu'Appelle Valley Calling Lakes region has need for a tourist hub or gathering space. While Fort Qu'Appelle is the acknowledged hub of the region, the town itself is not organized in a way that supports a programmed visitor's experience. Highway 10 passes through on the outskirts of the town and there is very little signage to bring visitors into the town itself. The tourism information booth, the Grand Trunk Pacific Railway Station, is difficult to identify and does little to encourage travellers to stop in Fort Qu'Appelle. The town of Fort Qu'Appelle is rightly undertaking a mainstreet revitalization project that should place emphasis on the visitor's complete experience, starting with improved signage and wayfinding system.
Features, Products + Facilities	**Cultural + Historical Features** • Many historic buildings and sites • Qu'Appelle Valley Centre for the Arts	**Cultural + Historical Features** • Lakeside Heritage Museum • Last Mountain Lake Cultural Centre	**Cultural + Historical Features** • Goodwin House Interpretive Centre (Saskatchewan Landing Provincial Park) • The SkyTrail project at Outlook • F.T. Museum (Riverhurst) • Museums and galleries	The region is hard pressed to promote itself as a golf destination, as the two courses, Katepwa Beach Golf Club and Echo Ridge Golf Course, are both nine-hole golf courses. As a boating destination, The Qu'Appelle Valley Calling Lakes region is at a disadvantage to Regina Beach and Lake Diefenbaker, as there is no full service marina. As a fishing destination, Lake Diefenbaker is widely regarded as the most popular angling waterbody in Saskatchewan. The Lake Diefenbaker region annually hosts three major fishing derbies: The Lake Diefenbaker Walleye Classic, Saskatchewan Landing International, and the Riverhurst Walleye Classic. The Qu'Appelle Valley Walleye Cup International Tournament, once part of a Walleye Trail tournament, has been suspended indefinitely.

Qu'Appelle Valley Calling Lakes Region Advantages (Approximately 1,200 km²)	Regina Beach (and Last Mountain Lake area) (Regina Beach - Approximately 3 km²)	Lake Diefenbaker (Approximately 17,400 km²)	Assessment
Recreation + Tourism Features • Provincial Parks (PP) (2): Echo Valley PP and Katepwa Point PP • Golf Courses (2): Echo Ridge Golf Course (nine hole course), Katepwa Beach Golf Club (nine hole course) • Boat launches: Echo Lake PP, Katepwa Point PP, Fort Qu'Appelle Campground • Ravine Adventures **Features not found in Competition** • Saskatchewan Fish Culture Station • The Mission Ridge Winter Park • Trans Canada Trail • Race Track (Lebret) **Events not found in Competition** • Qu'Appelle Valley Centre for the Arts Midsummer's Arts Festival • First Nations powwows (4) • Treaty Four Celebrations • Fort Qu'Appelle Lions Echo Lake Road Race (20 km) **Activities** • Summer: swimming, boating, fishing, hiking, biking, golfing and camping • Winter: downhill skiing, cross-country skiing, snowmobiling, skating and ice fishing	**Recreation + Tourism Features** • Provincial Park: Regina Beach Recreation Site • Other Provincial Parks in the region: Rowan's Ravine PP, and Last Mountain Historic Park • Last Mountain Lake National Wildlife Area (Bird Sanctuary) (N of Last Mountain Lake) • Golf Course (1): Regina Beach Golf Course (nine hole) • Marina (1): Regina Beach Yacht Club **Features not found in Competition** • R Bar B Riding Stables and Go Karts **Events not found in Competition** • Regina Beach Triathlon • Regina Beach Lions Walleye Classic **Activities** • Summer: swimming, boating, fishing, hiking, biking, golfing, and camping • Winter: snowmobiling, cross-country skiing, and ice fishing	**Recreation + Tourism Features** • Provincial Parks: Danielson PP, Douglas PP, Saskatchewan Landing PP • Regional Parks: Palliser Regional Park, Prairie Lake Regional Park • Golf Courses (6): Sage View Golf Resort (Palliser Regiona Park), Sask Landing Golf Resort (Saskatchewan Landing PP), and the Harbour Golf Club & Resort (Elbow), Riverview Golf Club (Outlook), Davidson Golf and Country Club, and Dakota Dunes Golf Links (18 hole) ("Best New Canadian Course" in 2005 by Gold Digest) • Marinas (3): Lakeside Marina, Village of Elbow; Anchor Marine, Saskatchewan Landing PP; Rustys Coulee, Palliser Regional Park • Boat launches: Cabri Regional Park, Prairie Lake Regional Park, Hitchcock Bay, Coteau Beach, Danielson Provincial Park, Douglas Provincial Park **Features not found in Competition** • Dakota Dunes Casino and Entertainment Centre • Lake Diefenbaker Cycling Tour (Tourism Saskatchewan) • Trans Canada Trail/SkyTrail walking bridge **Events not found in Competition** • Three major fishing derbies: The Lake Diefenbaker Walleye Classic, Saskatchewan Landing International, and the Riverhurst Walleye Classic • First Nation powwow (1): Dakota Dunes • Whitecap Sports Days • Agricultural exhibitions **Activities** • Summer: swimming, boating, fishing, hiking, biking, golfing and camping • Winter: cross-country skiing, ice-fishing	As a beach destination, Regina Beach holds a distinct advantage over The Qu'Appelle Valley Calling Lakes region. Apart from the quality of the beach, and its long history as Regina's beach, the town promotes itself as being a resort village; where one can visit the beach and then walk main street, buy jewelry at Rudy's Regina Beach, and stop for lunch at the Blue Bird Café, famous for its fish and chips. Last Mountain trails, which run alongside the lake at Regina Beach, are also promoted as being accessible and in close proximity to the beach itself. While the Resort Village of Katepwa has a number of the same attributes as Regina Beach, it is twice the distance from Regina and, as a result, is not as conducive to day trips.

Qu'Appelle Valley Calling Lakes Region Advantages (Approximately 1,200 km²)	Regina Beach (and Last Mountain Lake area) (Regina Beach - Approximately 3 km²)	Lake Diefenbaker (Approximately 17,400 km²)	Assessment
Restaurants and Diners (not chain) • Sandpipers Restaurant / Main Beach Bar and Grill (Katepwa Beach) • Off Broadway Bistro (Fort Qu'Appelle), Valley Bake and Coffee Shop (Fort Qu'Appelle)	**Restaurants and Diners (not chain)** • Blue Bird Café (famous fish and chips) • The WaterFront Beach Bar and Grill • Palmeras Restaurant	**Restaurants and Diners (not chain)** • Restaurants in Elbow, Provincial Parks and surrounding municipalities • Fine dining	The Qu'Appelle Valley Calling Lakes region has a number of accommodation options, in contrast to Regina Beach. Unfortunately, there are no condo rentals or high-end accommodations to draw tourists to the region. The existing accommodations are adequate for visitors passing through the region but, with the exception of the camps or small conference centres, they do not serve as resort destinations.
Hotels, Motels, Cabin Rentals, B&Bs, and Inns • The BraeBurn Inn (Fort-Qu'Appelle), Katepwa Beach Resort Hotel, Hillcrest Motel (Fort Qu'Appelle), Country Squire Inn (Fort Qu'Appelle) • B-Say-Tah Point B&B, Castle B&B (Fort Qu'Appelle) • Sunday's Log Cabins (Katepwa Beach), Valley Centre Cabin Rentals (Fort Qu'Appelle)	**Hotels, Motels, Cabin Rentals, B&Bs, and Inns** • Last Mountain Getaways (Cabin rentals)	**Hotels, Motels, Cabin Rentals, B&Bs, and Inns** • Hitchcock's Hideaway – Cabins, Camping, and Conference facilities, Sunset Suite and Elbow Hotel - Elbow, Elbow Harbour Golf Resort – R.V. Camping and Cabin rentals, Mainstay Inn – Hotel and Motel Resort facility, Sarah's Cove Condo Rentals – Condo facility featuring a swimming pool, and surrounding municipalities • 175-room hotel to be connected to the Dakota Dunes Casino and Entertainment Centre	
Camps and Conference Centres • 5 camps and/or retreat centres • The Calling Lakes Centre (north shore of Echo Lake), Orthodox Christian Centre (B-Say-Tah), Camp Lutherland, Katepwa Lake Camp, Camp Monahan (Katepwa Lake)	**Camps and Conference Centres** • No information on the Internet	**Camps and Conference Centres** • Mainstay Inn offers craft retreats • Hitchcock's Hideaway	
RV Parks and Camping • Over 400 campsites (5 campgrounds) • Provincial Park campground: Echo Valley PP • Other campgrounds: Town of Fort Qu'Appelle Campground, and South Katepwa RV Park, Katepwa RV Park, and Wapiimoostoosis TeePee Camp	**RV Parks and Camping** • No information on total campsites (3 campgrounds) • Regina Beach Campground • The Happy Camper (30 sites) • Butlers Campground	**RV Parks and Camping** • Over 1,000 campsites (7 campgrounds) • Provincial Park campgrounds: Danielson PP, Douglas PP, and Saskatchewan Landing PP • Other Campgrounds: Palliser Regional Park, Prairie Lake Regional Park, and Outlook Regional Park	

	Qu'Appelle Valley Calling Lakes Region Advantages (Approximately 1,200 km²)	Regina Beach (and Last Mountain Lake area) (Regina Beach - Approximately 3 km²)	Lake Diefenbaker (Approximately 17,400 km²)	Assessment
Marketing	**Marketing Tools** • Website: The Calling Lakes Qu'Appelle Valley Region (www.4callinglakes.ca) **Target Markets** • Outdoor Enthusiasts, Artists, Cottage Renters and Owners, Commuters and Retirees **Positioning / Brand** • "4 Lakes, 4 Seasons, 4 Everyone" • Four Season family destination experience with recreational, cultural and heritage opportunities. • Saskatchewan's Summer Paradise: Beautiful Beaches, Stunning Shore Line's, Breathtaking Wildlife and Wilderness • "Recreational Mecca" • Retirement Destination **Competitive Differentiation** • Unique history and cultural assets of the region • Mission Ridge Winter Park	**Marketing Tools** • Website: Town of Regina Beach (www.reginabeach.ca) **Target Markets** • Beach Enthusiasts, Cottage Renters and Owners, Commuters and Retirees **Positioning / Brand** • Regina Beach, The South Shore Saskatchewan • A Day at the Beach • A family vacation tradition since the early 1900's • Resort Village **Competitive Differentiation** • The Regina Beach Recreation Site is situated in the resort town of Regina Beach (Mainstreet experience) • Regina Beach Yacht Club	**Marketing Tools** • Website: Lake Diefenbaker Tourism (facebook, Twitter, Pinterest, YouTube) (www.lakediefenbakertourism.com) • Lake Diefenbaker Tourism Guide **Target Markets** • Outdoor Enthusiasts and Beach Enthusiasts **Positioning / Brand** • "Lake Diefenbaker, Jump In" • Big Lake **Competitive Differentiation** • Dakota Dunes Casino and Entertainment Centre • Dakota Dunes Golf Links (18 hole course) • Most popular angling waterbody in Saskatchewan • Lake Diefenbaker Yacht Club	One of the ways in which the region is presently being branded is as a "Recreational Mecca", promoting the region's existing infrastructure for outdoor recreation. The highlighted summer activities include: swimming, boating, fishing, and golfing. The highlighted winter activities include: downhill skiing, cross-country skiing, snowmobiling, and ice fishing. Only downhill skiing, with the Mission Ridge Winter Park, is a product offering unique to The Qu'Appelle Valley Calling Lakes region. Additionally, the two provincial parks located in the region, Echo Valley Provincial Park, and Katepwa Point Provincial Park provide The Qu'Appelle Valley Calling Lakes region with an overnight/camping experience advantage over Regina Beach. Another way in which the region is being promoted is through the slogan "4 Lakes, 4 Seasons, 4 Everyone". While this slogan provides an effective rallying point from a governance perspective, it is not effective for marketing the region's attractions, other than to promote the fact that there are four lakes and that it's a year-round destination.
Business + Services	**Visitor Services** • Fort Qu'Appelle Visitor Information Centre **Commercial Gift and Retail** • Fort Qu'Appelle: Fort Qu'Appelle Pottery and Art Gallery, Jany's Gift's & Creamery, Lebret Antiques & Collectibles • Lebret: The Little Glass Hut **Tourism Organization** • No designated organization	**Visitor Services** • No Visitor Information Centre **Commercial Gift and Retail** • Rudy's Regina Beach **Tourism Organization** • No designated organization	**Visitor Services** • Four Visitor Information Centres in the region **Commercial Gift and Retail** • No information on Website **Tourism Organization** • Lake Diefenbaker Tourism • Lake Diefenbaker Tourism Destination Area Plan (June 2008) • Co-operative marketing and promotional strategies, including memberships and participation with Lake Diefenbaker Tourism, West Central Tourism Region, Tourism Saskatoon and Tourism Saskatchewan	

Qu'Appelle Valley Calling Lakes Region Advantages (Approximately 1,200 km²)	Regina Beach (and Last Mountain Lake area) (Regina Beach - Approximately 3 km²)	Lake Diefenbaker (Approximately 17,400 km²)	Assessment
Municipal Government • The Calling Lakes Planning District Commission and its members • The Calling Lakes District Plan (Draft 2012)	**Municipal Government** • Town of Regina Beach • Town of Regina Beach Basic Planning Statement (2005)	**Municipal Government** • Waterwolf Planning District and its members • Waterwolf Growth Management Plan 2025	The cultural history and the natural attributes of the valley make it uniquely suited to support the development of aboriginal tourism focused on cultural and heritage experiences, as well as nature. In The Qu'Appelle Valley Calling Lakes region, with the right infrastructure, visitors could experience several aspects of Aboriginal culture including arts and crafts (viewing and making), dancing and drumming ceremonies, pow-wows, and traditional subsistence activities (fishing, hunting, trapping, and gathering). While Lake Diefenbaker has the successful Dakota Dunes Golf Links and the Dakota Dunes Casino, located on Whitecap Dakota reserve near Saskatoon, which is to be expanded to include a 161-room hotel, the facility is marketed as a destination resort for the region, not a cultural or nature based experience. There does not appear to be any aboriginal tourism products in Regina Beach.
First Nation • FHQTC and its members	**First Nation** • Lake Mountain Lake Indian Reserve is located SW of Regina Beach	**First Nation** • Whitecap Dakota First Nation (WDFN) is the only First Nation located in the Lake Diefenbaker destination area. Tourism development at WDFN is guided by a Land Use Plan and Master Plan for the development of the Dakota Dunes Destination Resort.	

Governance

5. Strengths, Weaknesses, Opportunities + Threats Analysis

A strengths, weaknesses, opportunities and threats analysis (SWOT) is a tool for understanding the tourism destination and its environment. The SWOT analysis provides a complete picture of the tourism situation in the Qu'Appelle Valley Calling Lakes region. The analysis is informed by stakeholder surveys and analysis. The SWOT analysis is presented in Table 5.1.

Table 5.1. SWOT Analysis

Topics	Strengths	Weaknesses
Natural Environment	• Natural + cultural landscapes of high value • Large proportion of undisturbed landscape + native vegetation • Unique geology • High quality wildlife habitats • Four lakes with great fishing opportunities • One of the sunniest region in Canada	• Uncontrolled development along scenic corridors • Poor water quality, especially during summer months • Lack of architectural control policies • Long and cold winters
Access + Infrastructure	• Proximity to Regina and international airport (1 hr) • Proximity to Highway 1 (15-25 min) • Proximity to CN Railway station at Melville (45 min) • Daily passenger transportation (STC) (Regina-Fort Qu'Appelle-Lebret) • Municipal interest in developing an interconnected network of trails and paths	• Improvements on Highway 10 are necessary to improve safety • No designated bicycle trails • Few walking trails and pathways • No proper waste water and stormwater management • Lack of public/passenger transportation • Lack of transportation coordination during major events • Lack of taxi service
Features, Products + Facilities	• Rich history and culture • Many heritage buildings and sites • Many cultural activities (pottery, summer art festival, Powwow, etc.) • Some unique and scarce recreation and tourism features • Echo Valley Provincial Park – one of the largest provincial park campgrounds in SK • Local and provincial events • Ski hill	• Low quality of some beaches • Low supply of year round recreational and tourism opportunities • Scattered features, no clusters • Lack of family-friendly activities • Difficult navigation between the lakes • Lack of winter and shoulder season products
Hospitality + Management Capacity	• Good supply of campgrounds and existing supply of accommodation stock	• Supply of accommodation does not match demand • Low diversity of accommodation types • Dated accommodations • Lack of a comprehensive resort • Lack of hotel + convention centre • Lack of family friendly accommodations • Supply of campsites does not match demand • Lack of sustained training
Marketing	• Calling Lake Planning District oversight • Aboriginal tourism marketing through Tourism Saskatchewan	• No destination marketing organization • No Aboriginal Tourism association • Lack of a common brand or consistency • Lack of integration of First Nations • Lack of tourism data specific to the Qu'Appelle Valley - Calling Lakes region • Low amount of tours and packages • Slow uptake of innovative Internet marketing techniques
Businesses + Services	• Vibrant communities providing multiple services • Access to internet, a radio station and newspaper delivery (local and from Regina) • Fort Qu'Appelle Visitor Information Centre	• Wi-Fi not widely accessible • Scattered assets each focused on its own clientele and not working together • Lack of downtown revitalization • Limited range of retail • Little variety in food and beverage services and little featuring local food/culture
Governance	• Strong policy framework for tourism development in the Calling Lakes Planning District Official Plan • Strong policy framework for heritage and cultural preservation in the Town of Fort Qu'Appelle - Draft Official Community Plan	• Multiple authorities with poor communication capacity • Municipalities may lack the capacity or planning tools to implement policies that strengthen tourism in their communities

Opportunities	Threats	Topics
• Nature-based tourism products • Eco-tourism products • Wildlife viewing • Green labels and certifications • Design and architectural guidelines	• Water quality degradation • Long recovery time for water quality • Flooding • Slope instability • Loss of habitats • Loss of sense of place - what makes the Calling Lakes Region special • Overdevelopment	**Natural Environment**

• Passenger transportation
• Active transportation
• Coordination of transportation for major events
	• Macroeconomics factors such as:
	  - exchange rates
	  - rising fuel costs
	  - economic downturn
	• Provincial jurisdiction of highways
		Access + Infrastructure

• Growth in cultural tourism, aboriginal tourism, agro-tourism and ecotourism, and adventure tourism
• Potential for new tourism products and facilities:
  - marina and boat rentals
  - swimming pools
  - championship golf course
  - theme tours or tourism circuits
  - front/mid-country activities (mountain biking/hiking trails, camping, etc)
  - interpretation (settlement history and First Nations in the valley)
  - interpretation activities (centre/museum, pavilion)
	• Cost of development
	• Competition
		Features, Products + Facilities

• Potential for accommodation development (Four seasons resort, full range of overnight accommodations (1-4 stars)) • Potential for transforming the Indian Hospital and Fort San into a accommodation/multi-purpose centre • Potential for aboriginal tourism accommodation • Green labels and certifications • Update accommodation establishments	• Competition • Ageing population	**Hospitality + Management Capacity**
• Build a unique brand for the Qu'Appelle Valley • Use of apps and social media • Tourism product packages • Suggested travel itineraries	• Insufficient support (no marketing organization, no financial support, human resources, etc.)	**Marketing**
• Business networking and clustering • Use of Internet (online booking + marketing) • Wi-Fi accessible in public places	• High business taxes • Lack of cooperation between businesses and a fragmented approach to business development	**Businesses + Services**
• Planning tools available to guide tourism development, preserve cultural heritage, preserve and enhance natural and urban landscape (zoning by-law, overlay district, etc) • Unite municipal governments	• Community resistance to change • Lack of leadership • No financial support from provincial/federal government	**Governance**

6. Aboriginal Tourism Opportunities in the Qu'Appelle Valley

Aboriginal tourism in the Qu'Appelle Valley is at an early stage of development. Considering the market for this type of tourism, aboriginal tourism development opportunities in the Qu'Appelle Valley are then significant. To begin the evaluation of this potential, surveys were sent to stakeholders. Results are presented in Section 6.1 and aboriginal tourism development opportunities with potential locations are listed in Section 6.2.

6.1. Aboriginal Tourism Survey Results

The purpose of the survey was to determine the status of Aboriginal tourism in the Qu'Appelle Valley and the opportunities to further develop this sector. Table 6.1 presents the highlights of the results.

Table 6.1. Aboriginal Tourism Survey Highlights

Benefits	Impacts	Constraints	Threats
• Community pride • Economic development and employment • Sustaining lifestyle	• Trespassing, damage to property • More transportation issues	• Financial support • Leadership (lack of motivation/interest) • In-fight	• First Nation members might not welcome Tourism development within the communities • Low wages for people interested in working in the industry • Loss of interest due to lack of financial support and unkept promises

A list of potential tourism products were submitted and evaluated by the stakeholders. Products were evaluated from having a significant potential to no potential. Results are described below:

Significant potential	Moderate potential	Moderate to low potential
• Aboriginal interpretation centres/tours • Aboriginal accommodation services • Aboriginal food services • Outdoor adventure activities /tours	• Aboriginal festivals, live performance • Aboriginal art galleries/crafts	• Traditional outdoor activities (hunting, trapping, etc.)

According to the stakeholders, priorities for Aboriginal tourism product development should be:

- Aboriginal accommodation/camp
- Aboriginal food services
- Aboriginal interpretation/guide
- Aboriginal performance, art/crafts, story telling
- Outdoor activities (canoeing, riding, games, dances)

6.2. Aboriginal Tourism Development Opportunities

Aboriginal tourism development opportunities in the Qu'Appelle Valley were identified by combining the results of the surveys with the analysis. These opportunities are summarized in Table 6.2. This list represents a wide array of opportunities for aboriginal tourism within the Qu'Appelle Valley. Engaging and empowering First Nations in the development of tourism products is an essential condition to providing authentic visitor experiences that respect the rights, culture, resources and knowledge of the host community that do not fall into stereotypes.

Challenges in the development of Aboriginal tourism products are significant. It can include such things as community approval processes, lack of community awareness of tourism industry, restricted access to land and financial resources, and gaps in human resource and capacity. Strategies to overcome some of these challenges are discussed in Chapter 8. Tourism Strategies.

Table 6.2. Aboriginal Tourism Development Opportunities

Aboriginal Tourism Product Type	Concept/Examples	Potential Locations
Cultural Features + Activities		
Interpretive Centre/ Museum/Art Centre and/or Gallery	The type of interpretation facilities could vary from an interpretive centre/museum to a small scale interpretation pavilion with self-guided displays depending on funding. Aboriginal art from local artist can be showcased in a designated art centre/gallery, or in partnership with an accommodation establishment or other cultural venues. Examples: • NK'MIP Desert Cultural Centre, Osoyoos, BC • First Nations Garden, Montreal, QC (interpretive pavilion and garden) • Skwachays Healing Lodge, Vancouver, BC	• Standing Buffalo First Nation Reserve (Community Hub/Powwow Grounds) • Treaty Four Governance Centre and Powwow Grounds • Could be combined with an accommodation establishment (example: Hôtel-Musée Premières Nations, Wendake, QC) • Could be in partnership with the Qu'Appelle Valley Centre for the Arts.
Healing/Wellness Experience	Activities to learn about aboriginal spirituality and traditional medicine. Hands-on workshop type format to help prepare medicinal products.	• In partnership with an interpretive centre/ museum, a traditional village, tipi camp or other accommodation establishments
Crafting Traditional Products	Activities to learn about traditional craft such as weaving, beadings, and tipi-making.	• In partnership with an interpretive centre/ museum, a traditional village, tipi camp or other accommodation establishments
Culinary Experience	Interactive experience where visitors learn traditional food preparation and share a meal. Example: • Bannock & Berries, The Great Spirit Circle Trail, Manitoulin Island – Sagamok Region, ON	• First Nation Reserves • Could be combined with accommodation establishment
Traditional Village / Heritage Park	Site that demonstrate traditional village or camp and traditional activities. Examples: • Xatsull Heritage Village, McLeese Lake, BC • Wanuskewin Heritage Park, Saskatoon, SK	• Treaty Four Government Centre and Powwow Grounds • Could be combined with an interpretive centre/museum, and tipi camp accommodation

Aboriginal Tourism Product Type	Concept/Examples	Potential Locations
Adventure Experiences		
Horseback Riding Tours	Guided horseback riding tours to discover the natural beauty of the Valley. Tours can be expanded to include overnight in tipis or tents.	• First Nation reserves of Pasqua, Muscowpetung, and Piapot • Qu'Appelle River Valley
Canoe Tours	Guided canoe tours on the Qu'Appelle River and Pasqua Lake or multi-day guided canoe trips with overnight in traditional tipis or tent along the river. Example: • T'ashii Paddle School, Tofino, BC	• Qu'Appelle River, Pasqua Lake and adjacent lands on First Nation reserves
Fishing Trips	Guided fishing trips on the Calling Lakes, combined with meal preparation and traditional feast. Example: Moccasin Trails Adventures, ON	• Calling Lakes • First Nation reserves • Lakefront lands
Living off the Land Experience	Immersion in a multi-day experience where participant are living off the land utilizing traditional techniques such as trapping and fishing.	• First Nations reserves providing a level of remoteness. (Front-country Setting IV) • First Nation reserves of Pasqua, Muscowpetung, and Piapot
Wildlife Watching	Guided tours to observe wildlife in their natural habitats from an aboriginal perspective.	• First Nations reserves • Wildlife habitat protected areas (east of highway 6)
Winter Oriented Experiences		
Snowshoeing cross-country skiing, and/or dog sledding Tours	Guided snowshoeing and/or cross-country skiing tours. The tours could also be part of a multi-days trip combined with winter camping or cabin-to-cabin format.	• Could be offered as an activity based at an accommodation establishment such as an ecolodge or resort
Accommodations		
Ecolodge	Lodge developed and managed in an environmentally and culturally sensitive manner. Principles include working with the community in the planning and design phases, minimizing impacts on the environment, and using vernacular architecture languages. Example: • Cree Village Ecolodge, Moose Factory, ON	• First Nations reserves providing a level of remoteness. (Front-country Setting IV) • Lands with waterfront access • Sand pits (refer to landscape units)
Traditional Tipi Camp	Camping in traditional tipis. Camping could be of an ''all-inclusive'' type, providing all required equipment (furniture, bedding, etc.) Activities organized for guests could include bone fire with storytelling. Example: • Sundance Lodges, Kananaskis Village, AB	• First Nations reserves providing a level of remoteness. (Front-country Setting IV) • Lands with waterfront access • Sand pits (refer to landscape units)
First Nation Resort	A First Nation Resort would have a higher capacity and diversity of accommodations than an ecolodge and should provide more convenient access. The resort should provide a wide range of recreational and relaxing activities and potential for a conference centre. Example: • NK'MIP Resort, Osoyoos, BC	• Lands with waterfront access • Sand pits (refer to landscape units) • White Calf Lake Lands
Restaurants		
Aboriginal inspired food restaurant	Restaurant featuring Aboriginal inspired food. Dishes would ideally feature local products. Restaurant could work in partnership with community gardens to source vegetables. Example: • La Traite Restaurant, Hôtel-Musée Premières Nations, Wendake, QC	• In an Aboriginal tourism accommodation establishment

Aboriginal Tourism Product Type	Concept/Examples	Potential Locations
Tours + Excursions		
Historical Tours	Guided tours with interpretation on the history of the First Nations in the Qu'Appelle Valley.	• Qu'Appelle Valley
Boat Tours	Guided boat tours on the Calling Lakes with interpretation on the history of the First Nation in the Qu'Appelle Valley. Examples: • Takaya Tours, Cates Park, BC	• Pasqua, Echo and Mission Lakes
Ethnobotanical and Herbology Tours	Guided tours to learn about traditional medicine plants. Tours could be completed by hands-on workshops. Example: • Medicine Walk, The Great Spirit Circle Trail, Manitoulin Island – Sagamok Region, ON	• In areas where traditional medicine plants are harvested
Guided Hikes	Guided interpretive hike with interpretation on the history of the First Nations, stories, etc.	• First Nation Reserves • Forested slopes
Cycling Tours	Guided cycling tours with interpretation on the history of the First Nations, stories, etc. Example: • Demiwe Cycling Tour, The Great Spirit Circle Trail, Manitoulin Island – Sagamok Region, ON	• Trans Canada Trail • First Nation Reserves

7. A Vision for Tourism in the Qu'Appelle Valley

Quality of life in the Qu'Appelle Valley is produced from a rich cultural history and deep connection to the valley landscape. This connection to place is highly valued by residents and stakeholders, and must be preserved as the valley develops. The vision, principles and objectives for tourism development in the Qu'Appelle Valley are based on the analytical results undertaken for this study. This vision is a starting point for tourism development, and recognizes that both residents and visitors benefit from tourism activities that are economically viable and that enhance local prosperity, community well-being and environmental protection.

7.1. Tourism Vision Statement

A vision has been identified with stakeholders to define the direction of tourism development in the Qu'Appelle Valley Calling Lakes region.

> *The Qu'Appelle Valley Calling Lakes region delivers outstanding, year-round experiences that respect the environment, celebrate culture and enrich quality of life for visitors and residents alike. Highly valued landscapes are protected, local economies are strengthened and all area communities prosper.*

7.2. Tourism Guiding Principles

Guiding principles establish a framework for decision-making about tourism development in the Qu'Appelle Valley. Tourism strategies, and all policies and actions undertaken to implement them, should align with these principles.

Respect nature. Negative environmental impacts are minimized. Tourism development is in harmony with and inspired by nature. The high quality of the Qu'Appelle Valley landscape is maintained and enhanced as a tourism resource.

Honour and celebrate culture. Tourism development respects aboriginal rights, traditions and culture. First Nations are empowered in the development of tourism opportunities. Aspects of local cultural heritage and distinctiveness are incorporated into various elements of visitor experience.

Remember history. There are many opportunities to showcase and interpret the history of the Qu'Appelle Valley. Heritage resources, including sites, landmarks and architecture, are preserved and constitute tourism opportunities.

Cluster rather than disseminate. Encourage clusters and networking of businesses. Individual operators work together in order to create an environment that tourists want to visit. Clusters of tourism attractions are more efficient for development, visitor use and operational management.

7.3. Tourism Objectives

Objectives define the desired outcomes for tourism development in the Qu'Appelle Valley. 18 objectives are identified, organized in seven distinct topic areas.

Table 7.1. Tourism Objectives

Topics	Objectives
Natural Environment	1. Maintain and improve the ecological and scenic integrity of the valley landscapes. 2. Maintain and improve ecological infrastructure that contributes to soil protection, water quality, riparian health and biodiversity. 3. Increase understanding and enjoyment of the Qu'Appelle Valley's regional ecology.
Access + Infrastructure	4. Improve tourism mobility infrastructure including walking, biking, public/private transportation, and driving. 5. Improve the quality of the public realm. 6. Promote appropriate waste water treatment at both the local and regional scale to enhance water quality.
Features, Products + Facilities	7. Develop a diverse range of tourism opportunities that will attract and benefit a broad group of users. 8. Increase aboriginal tourism. 9. Increase cultural tourism. 10. Improve the seasonal distribution of visitation and increase year round tourism employment opportunities.
Hospitality + Management Capacity	11. Provide quality and diversity of accommodations. 12. Develop a high quality well trained local labor force.
Marketing	13. Improve marketing in order to increase visitation and expenditures in the Qu'Appelle Valley Calling Lakes region.
Businesses + Services	14. Foster the development of new tourism businesses, help existing businesses grow, and improve the profitability of tourism operations. 15. Develop and enhance services and amenities that benefit both residents and tourists. 16. Contribute to the local economy.
Governance	17. Ensure local government and First Nations policies and programs support a strong, profitable and innovative tourism industry. 18. Engage and empower First Nations in planning and decision making about the management and future development of tourism products.

8. Qu'Appelle Valley Tourism Strategies

The Qu'Appelle Valley tourism strategies are organized around seven topics and 18 objectives. In total, 44 strategies are identified. The Qu'Appelle Valley Tourism Strategy Map supports the overall strategies by locating elements in the study area. Strategies will be evaluated, prioritized and detailed in the next stages of the project. Strategies are presented in Table 8.1 and in Figure 8.1.

Aboriginal Node

Gateway - Highway 56

Recreation Corridor

Nature-Based Tourism Area

The Qu'Appelle Valley Tourism Strategies map is composed of six main elements:

Nodes: Nodes are areas where recreation/tourism features, products, facilities and services are clustered. They are typically located in a settlement.

Aboriginal Tourism Nodes: The aboriginal tourism nodes are similar to the nodes but have a strong aboriginal identity.

Scenic corridors: The scenic corridors are the main access roads to the nodes. These corridors are visually sensitive as they contribute to the first impression of the region and the sense of place.

Gateways: Gateways are located along scenic corridors and contribute to the sense of arrival.

Recreation corridors: Recreation corridors are multi-purpose trails which provide recreational, interpretation and transportation opportunities.

Natured-Based Tourism Areas: Natured-based tourism areas are areas presenting opportunities for the practice of recreational activities directly related to natural attractions such as wildlife watching, canoeing, hiking, horseback riding, etc.
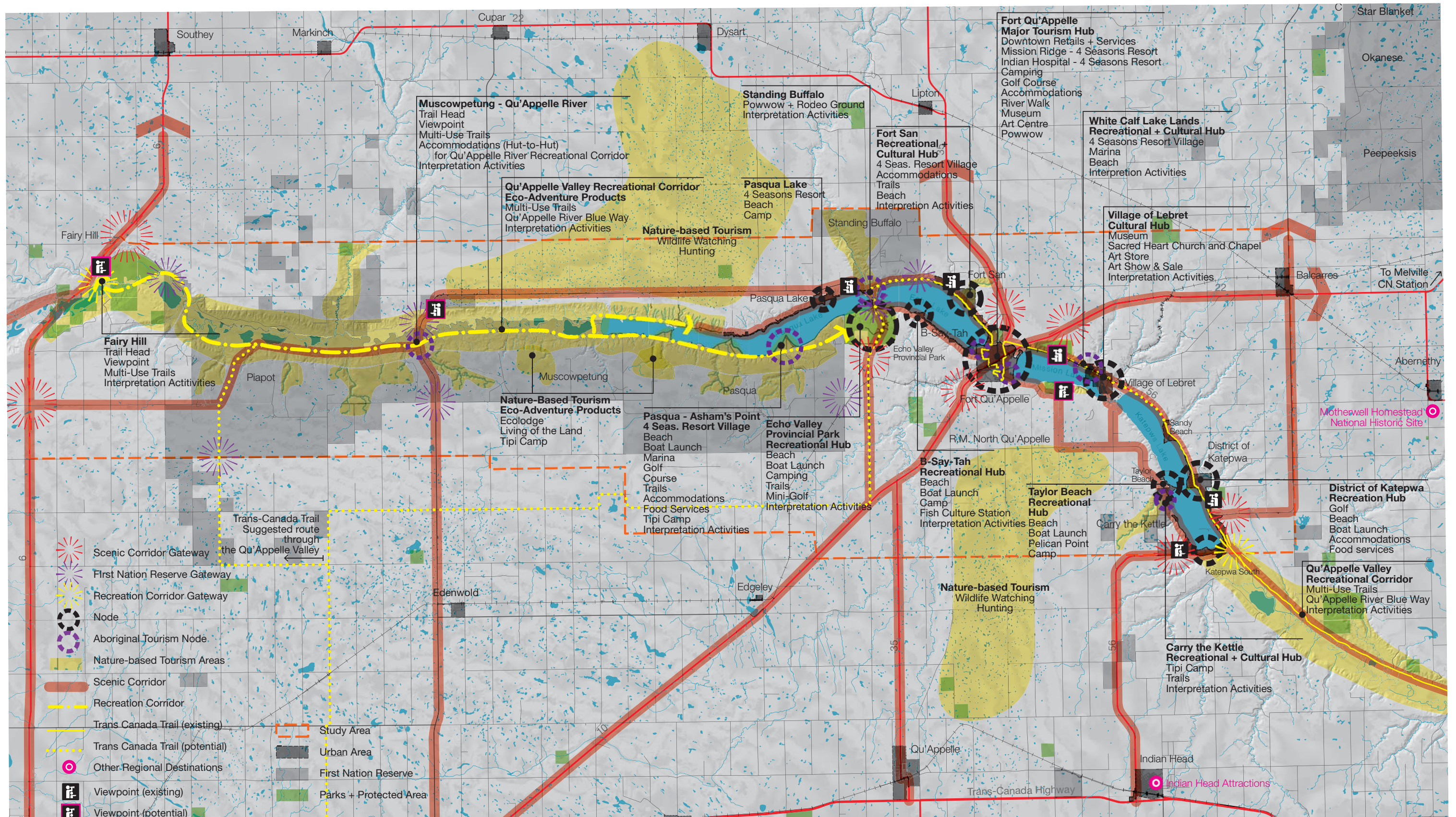
Fort Qu'Appelle
Major Tourism Hub
Downtown Retails + Services
Mission Ridge - 4 Seasons Resort
Indian Hospital - 4 Seasons Resort
Camping
Golf Course
Accommodations
River Walk
Museum
Art Centre
Powwow

Standing Buffalo
Powwow + Rodeo Ground
Interpretation Activities

White Calf Lake Lands
Recreational + Cultural Hub
4 Seasons Resort Village
Marina
Beach
Interpretion Activities

Muscowpetung - Qu'Appelle River
Trail Head
Viewpoint
Multi-Use Trails
Accommodations (Hut-to-Hut)
   for Qu'Appelle River Recreational Corridor
Interpretation Activities

Fort San
Recreational +
Cultural Hub
4 Seas. Resort Village
Accommodations
Trails
Beach
Interpretation Activities

Qu'Appelle Valley Recreational Corridor
Eco-Adventure Products
Multi-Use Trails
Qu'Appelle River Blue Way
Interpretation Activities

Pasqua Lake
4 Seasons Resort
Beach
Camp

Nature-based Tourism
Wildlife Watching
Hunting

Village of Lebret
Cultural Hub
Museum
Sacred Heart Church and Chapel
Art Store
Art Show & Sale
Interpretation Activities

Fairy Hill
Trail Head
Viewpoint
Multi-Use Trails
Interpretation Actitivities

Nature-Based Tourism
Eco-Adventure Products
Ecolodge
Living of the Land
Tipi Camp

Pasqua - Asham's Point
4 Seas. Resort Village
Beach
Boat Launch
Marina
Golf
Course
Trails
Accommodations
Food Services
Tipi Camp
Interpretation Activities

Echo Valley
Provincial Park
Recreational Hub
Beach
Boat Launch
Camping
Trails
Mini-Golf
Interpretation Activities

Motherwell Homestead
National Historic Site

R.M. North Qu'Appelle

B-Say-Tah
Recreational Hub
Beach
Boat Launch
Camp
Fish Culture Station
Interpretation Activities

Taylor Beach
Recreational
Hub
Beach
Boat Launch
Pelican Point
Camp

District of Katepwa
Recreation Hub
Golf
Beach
Boat Launch
Accommodations
Food services

Nature-based Tourism
Wildlife Watching
Hunting

Qu'Appelle Valley
Recreational Corridor
Multi-Use Trails
Qu'Appelle River Blue Way
Interpretation Activities

Carry the Kettle
Recreational + Cultural Hub
Tipi Camp
Trails
Interpretation Activities

Trans-Canada Trail
Suggested route
   through
the Qu'Appelle Valley

Indian Head Attractions

Legend:
Scenic Corridor Gateway
First Nation Reserve Gateway
Recreation Corridor Gateway
Node
Aboriginal Tourism Node
Nature-based Tourism Areas
Scenic Corridor
Recreation Corridor
Trans Canada Trail (existing)
Trans Canada Trail (potential)
Other Regional Destinations
Viewpoint (existing)
Viewpoint (potential)
Study Area
Urban Area
First Nation Reserve
Parks + Protected Area

Figure 8.1. Tourism Strategies

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Table 8.1. Tourism Strategies

Objective # 1	Maintain and improve the ecological and scenic integrity of the valley landscapes.
Strategy 1.	Explore the possibility of integrating the scenic corridors into the Calling Lakes District Plan and develop design guidelines for new development within scenic corridors including signage guidelines. (Refer to 3.1(a)(6) of CLDP) and Figure 3.3 Scenic Corridors). Scenic corridors, access corridors, are visually sensitive. The identification of these corridors and specific policies that apply can help municipalities to evaluate proposals and make recommendations to ensure the protection and enhancement of the landscape.
Strategy 2.	Identify improvements required at each of the gateways including landscaping and signage. Gateways are located along scenic corridors and contribute to the sense of arrival. The Tourism Strategies map (Figure 8.1) identifies the location of these gateways. Landscaping and signage can improve these important entry points in the valley and enhance visitor experience.
Objective # 2	Maintain and improve ecological infrastructure that contributes to soil protection, water quality, riparian health and biodiversity.
Strategy 3.	Explore the possibilities of adding low impact development strategies to stormwater management in municipal bylaws as part of landscape standards. (Refer to 3.6(b)(1)(b) and (d) of CLDP)
Strategy 4.	Work with the Lower Qu'Appelle and Upper Qu'Appelle Stewardship Group and stakeholders to ensure the sustainability of the lakes and surrounding water systems. e.g., stakeholders would include agricultural producers, industry, upstream municipalities, scientists, etc.
Strategy 5.	Develop a program to conserve and/or revegetate riparian areas in residential / lakeside cabin areas.
Objective # 3	Increase understanding and enjoyment of the Qu'Appelle Valley ecology.
Strategy 6.	Promote the Geolog Tour developed by the University of Saskatchewan. Brochures and/or an application of the Geolog Tour can be developed and distributed to visitors.
Strategy 7.	Develop interpretive signage and programs on the Qu'Appelle Valley ecology.

Natural Environment Strategies
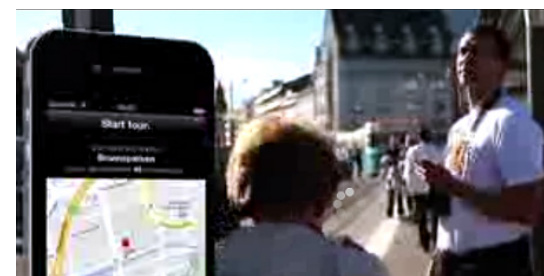

+

Aboriginal Public Art | Gateway Element

+

Rain Garden

+

Riparian revegetation | Community Activity

+

Interpretive Tours

+

Interpretive Tour Application

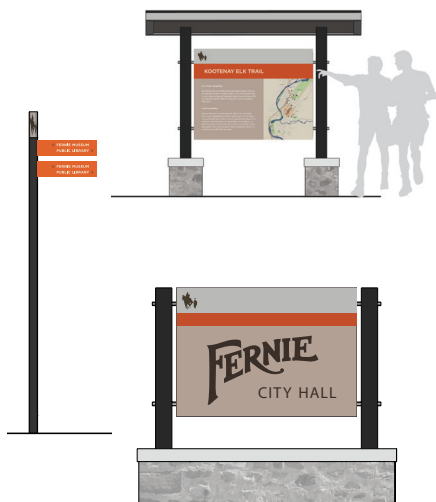# Access + Infrastructure Strategies

+
Ski Bus

+
Street Festival

+
Annual Parade

+
Comprehensive Signage Strategy

Objective #4	Improve tourism mobility infrastructure including walking, biking, public/private transportation, and driving.
Strategy 8.	**Work with the Area Transportation Planning to identify improvements required to the Highways in the region.** Highway 10 and scenic corridors that loop around the Calling Lakes should be upgraded and maintained to a high standard. Improvements include: passing lanes on Highway 10, pavement and shoulders for roads around the lakes to improve safety for cyclists.
Strategy 9.	**Develop a trail master plan which includes a recreational corridor along the Qu'Appelle Valley as the backbone of the trail system.** The plan should identify trails on Municipal Reserve lands (Refer to 3.2(b)(5)(g) of CLDP). The trail network should connect communities to tourism attractions and services.
Strategy 10.	**Work with passenger transportation providers to ensure tourists and residents demand are both met and negative impacts of traffic during major events are minimized.** The region is predominantly automobile oriented tourism destination. Taxi services can fulfill a need for transportation within the Qu'Appelle Valley. Coordination with passenger transportation providers during major events can prevent negative traffic impacts by providing shuttle services.

Objective # 5	Improve the quality of the public realm and urban landscape.
Strategy 11.	**Continue Downtown revitalization efforts in the Town of Fort Qu'Appelle.** A dynamic downtown with quality public realm is attractive to visitors. The Town of Fort Qu'Appelle should continue its effort to revitalize Broadway Street. Main Street program provides valuable information to help in the revitalization process. Strategies could include activities such as an art market or a street festival, and improvements to the public realm and streetscape such as street trees, public art, signage and furniture.
Strategy 12.	**Identify areas that could be defined as an architectural control district within the five communities and develop architectural and signage guidelines.** (Refer to 3.3 (b)(7)(a) of CLDP) The Significant Tourism Areas map provides information to identify these districts. Identification of urban areas within the Town of Fort Qu'Appelle should be coordinated with the development of the revitalization strategy.
Strategy 13.	**Develop signage guidelines for all nodes.**
Strategy 14.	**Work with CRUP (Cultural Resource Use Partnership) on the development of cultural initiatives and a Cultural Plan.** Ensure that the First Nations are involved in the development of cultural initiatives and that public art, especially aboriginal public art, is promoted. Interpretive programs should also be considered in the development of the Plan.

Objective #6	Promote appropriate waste water treatment at both the local and regional scale to enhance water quality.
Strategy 15.	**Develop a strategy for ensuring that individual residents and businesses have the proper liquid waste disposal system in place.**

Objective #7	Develop a diverse range of tourism opportunities that will attract and benefit a broader group of users.
Strategy 16.	**Explore the possibility of identifying lands best suited for recreation in the Calling Lakes District Plan.** (Refer to 3.6(a)(5) of the CLDP). Significant tourism areas mapped in this study provide information to identify and map these lands.
Strategy 17.	**Develop a recreational corridor/blue way in the Qu'Appelle River Valley favorable to mid-country and front-country recreational activities.** The recreational corridor can be developed using a mix of existing roads and trails and the development of new trails. This long corridor, combined with accommodations (camping and/or hut), will be suitable for adventurers for both summer (cycling, mountain biking, canoeing, hiking) and winter activities (snowshoeing, cross-country skiing). Work with Saskatchewan Trails Association to explore the possibility of aligning a section of the Trans Canada Trail in the recreation corridor.
Strategy 18.	**Improve existing viewpoints and develop additional viewpoints at Mission Lake and along scenic corridors to appreciate the scenic Qu'Appelle Valley.** Viewpoints along the scenic corridors that loop around the Calling Lakes will provide amenities for drivers and cyclists touring the lakes. This activity could be promoted as the "Tour of Calling Lakes".

Objective #8	Increase aboriginal tourism.
Strategy 19.	**Evaluate the feasibility and prioritize aboriginal tourism development opportunities identified in this study.** This study presents a series of Aboriginal tourism opportunities that are nature/land based supported. Some of the highlighted Aboriginal tourism experiences include arts and crafts (viewing and making), dancing and drumming ceremonies, powwows, local cuisine and traditional subsistence activities (fishing, hunting, trapping, gathering, use of medicinal plants). These opportunities should be evaluated by First Nations in terms of feasibility, acceptability and community support.
Strategy 20.	**Organize an event to share and capture aboriginal stories and legends (e.i. Word Fest).** Event should be captured on video/audio to be conserved digitally and used for other cultural facilities/events. This event can bring awareness on Aboriginal tourism in the Qu'Appelle Valley. The event could be held on National Aboriginal Day.
Strategy 21.	**Develop a signage strategy to include the name of places in First Nation traditional languages or the common names as known by First Nations.** Signage throughout the region can feature native languages on equal footing with English. A good precedent is the Sea to Sky road in British Columbia.

Objective #9	Increase cultural tourism.
Strategy 22.	**Work with CRUP on the development of cultural initiatives with a focus on cultural tourism.** Develop cultural programs and initiatives to boost cultural tourism such as land art and art installations festivals and live performances. The scenic landscape of the valley is the perfect background to host land art festivals.
Strategy 23.	**Develop partnerships with local museums and artists and other cultural associations.** Approach museums in Regina to develop "off-site" cultural programs, including Aboriginal theme cultural programs.

Features, Products + Facilities Strategies

Credit: Plania, CLD Matapédia - Les Plateaux

Route des Belvédères | Matapédia QC

Aboriginal Shared Stories

Aboriginal Signage Strategy

Land Art

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Family Ski Getaway

The perfect one night, family winter vacation package with Cook
Your Own Breakfast groceries delivered to your room. You can hit
the slopes with two adult tri-area ski passes and soak up the

\+
Winter Tourism Packages

\+
Skating Nuit Blanche

\+
Family Skating

Objective #10	Improve the seasonal distribution of visitation and increase year round tourism employment opportunities.
Strategy 24.	**Develop winter packages including activities and products such as ski passes, museums entrances, Winter Festival tickets, and accommodation.**
	Explore the possibility to promote these packages with Tourism Saskatchewan.
Strategy 25.	**Continue to host the Winter Festival in Fort Qu'Appelle and expand marketing.**
Strategy 26.	**Develop additional unique winter experiences.**
	Activities could include skating on the lakes (long circuit with lanterns), cross-country skiing throughout the Valley with huts (Qu'Appelle Valley recreational corridor). Winter activities with an aboriginal tourism theme experience should be encouraged, such as snowshoeing circuit and night in tipi, winter camping, etc.

Objective #11	**Provide quality and diversity of accommodations.**

Strategy 27. **Explore the opportunity of developing an aboriginal accommodation establishment type, such as an ecolodge, a hotel-museum and/or teepee camping.**
Refer to Table 6.2. Aboriginal Tourism Development Opportunities for a list of opportunities.

Strategy 28. **Explore opportunities to develop a four season resort. Potential locations include:**

- **Mission Ridge Winter Park (ski-in, ski-out)**
The location of Mission Ridge Winter Park and nature of this facility offer a unique opportunity to develop a four season resort village. A range of accommodation options could be envisioned such as time share condos, hotel, etc. Complementary activities to winter skiing could be developed such as mountain biking.

- **Pasqua – Asham's Point and White Calf Lake Lands**
These locations offer a unique opportunity to develop a four season resort with a focus on Aboriginal tourism experiences.

- **Fort San**
Existing historical buildings and the proximity of the lake could offer a unique resort experience.

Strategy 29. **Explore the possibility of developing glamping opportunities in existing campgrounds or in future campground sites.**
Glamping refers to a luxury type of outdoor accommodation that is usually all furnished (bed and bedding, dishes, BBQ, etc). Glamping offer opportunities for non-initiated to experiment camping in a more comfortable setting and can expand the range of clientele. (e.g. Otentiks at Prince Albert National Park)

Objective #12	**Develop a high quality well trained local labor force.**

Strategy 30. **Explore the need and possibility of having an industry-specific workshop offered by Saskatchewan Educational Tourism Council.**
Contact Saskatchewan Tourism Education Council for training tools and available courses.
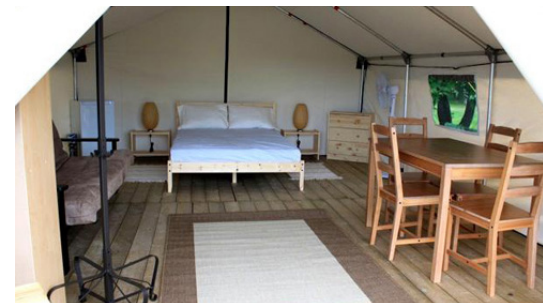
Hospitality + Management Capacity Strategies

+
Hotel-Musée Premières Nations | Wendake QC

+
Cree Village Ecolodge | Moose Factory ON
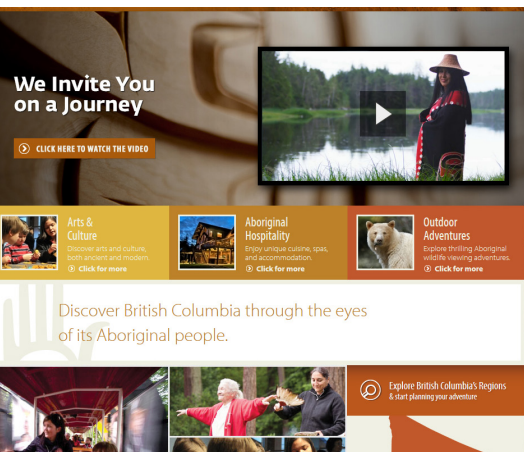

+
Glamping

Marketing Strategies

Tipi Fishing Camp

Canadian Badlands Branding

Aboriginal Tourism Association
of British Columbia

Objective #13	Improve marketing in order to increase visitation and expenditures in the Qu'Appelle Valley Calling Lakes region.

Strategy 31. Confirm key markets and tourist profiles.

Additional research is required to collectively clearly define key markets and targeted tourist profiles. The findings of this study highlight two specific segments of tourism products with highest development potential:

- Cultural tourism

- Aboriginal tourism based on the geography, history and culture of the First Nations inhabitants

Strategy 32. Create a marketing plan for the Qu'Appelle Valley Calling Lakes tourism destination.

Marketing strategy should be staged to ensure a balance between product offering and the marketing of that offering.

Strategy 33. Create a unique and common brand image for the Qu'Appelle Valley Calling Lakes tourism destination.

A brand is more than a logo… it's a unique feeling about a destination, based on the emotional perception of its core assets (landscape, culture, attractions, etc...).

Objective #14	**Foster the development of new tourism businesses, help existing businesses grow, and improve the profitability of tourism operations.**

Strategy 34. **Create an independent, non-profit organization to enhance and grow the Qu'Appelle Valley Calling Lakes region tourism products and marketing activities.**

This organization should be charged with the responsibility for the overall tourism destination development and marketing functions. The organization should be composed of municipal representatives and First Nations to combine efforts.

Strategy 35. **Develop networking activities to bring tourism industries together and create a business cluster.**

Networking initiative could include such as lunch and learn, breakfast conference, etc.

Objective #15	**Develop and enhance services and amenities that benefit both residents and tourists.**

Strategy 36. **Develop a wireless program.**

Free wireless attracts people to come to and linger at venues offering this service. Wireless should be provided in commercial nodes and public areas. Businesses should be encouraged to provide this service to its clients.

Objective #16	**Contribute to the local economy.**

Strategy 37. **Promote "buying local".**

The importance of supporting the businesses in the Qu'Appelle Valley should be promoted within the communities and visitors to ensure economic vitality. Promoting "buying local" is consistent with revitalization strategy undertaking by the Town of Fort Qu'Appelle.

Strategy 38. **Promote local products in businesses.**

Encourage businesses to use and promote each other's products and services. For instance, First Nation arts can be featured in accommodation and food service establishments, bakery products can be served in other food services establishments, etc.

Businesses + Services Strategies

+
Lunch and Learn

+
Wireless Access

+
Buying Local Campains

+
Local Arts Featured in Accommodation and Food Service Establishment

Governance Strategies

Saskatchewan Tourism Education
Council Programs

Objective #17	Ensure local government and First Nations policies and programs support a strong, profitable and innovative tourism industry.
Strategy 39.	**Identify protected viewsheds and scenic corridors in municipal planning documents.** Viewsheds are recognized in most municipal plans as critical to supporting the tourism industry, however are not mapped or given additional policy or regulatory protection. Viewsheds and scenic corridors that are sensitive to development should be identified and protected. Policies could include development restrictions or architectural design guidelines to ensure development complements the surrounding landscape.
Strategy 40.	**Share mapping resources with municipalities.** Several comprehensive maps were developed through Stage 1 of the ITS. Work with municipal governments and First Nations to identify any mapping resources such as recreation corridor analysis that could be developed or enhanced to support planning documents and policies.
Strategy 41.	**Work with First Nations to adopt visions and goals related to tourism.** To develop an Aboriginal tourism sector, tourism development in First Nations should reflect community aspirations and strengths.
Objective #18	Engage and empower First Nations in planning and decision making about the management and future development of tourism products.
Strategy 42.	**Identify community champions that have the capacity to leverage aboriginal tourism development in their communities.**
Strategy 43.	**Identify programs required to build capacity and provide training for the First Nations to develop aboriginal tourism products.** Programs can include: business planning, feasibility analysis, tourism skills training, cultural interpretation training, front-line services training, etc.

9. Conclusion

The Qu'Appelle Valley Calling Lakes region has a number of natural and cultural assets that enable the region to differentiate itself from other tourism destinations in Saskatchewan. Tourism is an important sector in the region's economy, but weaknesses and threats could affect the destination's competitiveness. Without proper planning and management, increased tourism use could place undue pressure on existing infrastructure, communities and natural resources and therefore, threaten the very reasons that visitors are attracted to the region.

The Qu'Appelle Valley ITS identifies a series of recommendations to guide tourism development in the Qu'Appelle Valley Calling Lakes region. These recommendations were developed following an integrated approach to tourism development that considers the social and economic life of communities and the overall environmental context.

The first stage of the Qu'Appelle Valley ITS project developed a regional strategy that generated synergies between the stakeholders. This collaboration as well as continued commitment from the stakeholders is necessary to move forward with the next project stages.

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B. Stakeholders

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SARM	Robin Baxter
SARM	Dana Schmalz
Tourism Saskatchewan	Denise Stroeder, Tourism Industry Specialist
Town of Fort Qu'Appelle	Darrell Webster, Chief Administrative
Town of Fort Qu'Appelle	Ron Osika, Mayor
The Village of Lebret	Gwen Lowe
The Village of Lebret	Ken Lovatt
The Village of Lebret	Kelly Dodd
Resort Village of B Say Tah	Denis Palmiere
Star Blanket Economic Development	Lynda Big Knife
Pasqua First Nations	Bev. Chicoose
T/4 Heritage Project	Del Pasqua
T/4 Heritage Project	Phil Anaquod
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Heritage Saskatchewan	Jack Walton
Nicor Group	Lindsay Torrie
Saskatchewan Bed & Breakfast Association	Bryan Tudor
BraeBurn Inn	Pieter van der Breggen
Katepwa Hotel	John McKenzie
Fort Qu'Appelle Campground	Fort Qu'Appelle
Motherwell Homestead National Historic Park	Sheldon Matsalla
SaskCulture	Paul Gingras
Lower Qu'Appelle Watershed Stewards	Stephanie Peesker
Water Security Agency	James Hood
Zombie Prep Camp	Matt Drackett
Mission Ridge Winter Park	Don Williams
Echo Valley Provincial Park	Dallas Chorneyko
Ravine Adventures - Kids Snow Fun Days	Elli Biery
City of Regina	Liberty Brears
City of Regina	Jeff Erbach
Community Residents	
	Gus Vandepolder
	Metchild Morin
	Connie Chaplin

The Qu'Appelle Valley **INTEGRATED TOURISM STRATEGY**

O2 PLANNING + DESIGN

FHQ Tribal Council