

Kananaskis Whitewater - Economic Impact Assessment - 2024



Kananaskis Whitewater was developed as a world class destination for: river recreation; paddle sport training & competition; surf training & competition; and commercial raft & paddle sports operations. Since its inception in 1984, it has become one of the top destination rivers in Canada and a significant part of the Banff/Canmore/Kananaskis tourism asset mix.

This assessment puts the economic impact of the activities at Kananaskis Whitewater at over 32 million dollars per year. This number is in-line with the overall 2.8 billion of GDP spent on Outdoor Recreation on Crown Land in Alberta, as reported in 2020 by the Tourism Industry Association of Alberta (TIAA 2020). It also matches up with the findings of the Calgary River Users Alliance's assessment of Bow River Recreational (CRUA 2022) Paddlesports are one of the top recreational activities in Alberta with a combined percentage of 35% of Albertans participating in Canoe, Kayak, or Stand-Up-Paddleboard (ARPA 2022). Worldwide surfing has a \$60B economic impact (Surf Anywhere 2023)



Location:

The specific stretch of river mostly parallels highway 40, starting below the Barrier Reservoir and runs through to Seebe, after passing under the TransCanada highway. The river use starts in Bow Valley Provincial Park at Widowmaker Day-Use area, through Canoe Meadows Day-Use & Campground, and then progresses out of the park, down to the convergence with the Bow River at Seebe where the Lower Kananaskis River Users Association (LKRUA) has a lease for river recreation take-out.



Flows:

Kananaskis Whitewater starts below Barrier Reservoir and is subject to flows from the TransAlta power generation unit in accordance to the Licence agreement with the Province of Alberta (1998 Consolidated Agreement). The river is hydro-peaked meaning it goes from 0-1cms for much of the day (season depending), but to a full-flow condition. The normal full-flow from 1984-2023 was 26-32cms (with some variation due to calibration issues). Up to 2023 TransAlta has always provided summer flows mid-day, and in the winter it typically runs during daylight hours. This gave stable flows that all river users could rely on to plan events and daily activities. The Barrier dam generates 13MW/hour.

In the spring there is usually some days over 32cms for short periods of time during freshet. Every 5ish years there have been high water events 50+cms that require maintenance within the river. In 2013 a major flood required near complete reconstruction.

River Construction:

In 1984 Alberta Parks and the Alberta Whitewater Association (AWA) started enhancing the natural features of the river with the intention of creating a training, competition, and recreational area at Canoe Meadows for canoes and kayaks. Since the original build, an additional 10 construction periods ('84, '86, '89, '95, '98, '05, '08, '13, '14, '15, '19, '24[pending]) has built and improved river features from just below widowmaker, to the North edge of the Park downstream of Canoe Meadows. This includes six separate rapids upstream of the Canoe Meadows Racecourse, including the Mountain Wave built by the Alberta River Surfing Association (ARSA).

Each construction period has improved the overall concept, safety and functionality of the area.



Capital investments:

Kananaskis Whitewater is the result of more than \$5million in capital investments from 1984 to 2024. Given the annual economic impact, this return on investment is phenomenal.

Each river construction phase cost between \$200,000 and \$500,000. These have been funded by the Province of Alberta's Community Facility Enhancement Program, donated rock from Lafarge Canada, Federal Disaster Recovery Funding (2013/14/15), the Calgary Foundation, and significant river community funding via events, crowdfunding campaigns and non-profit associations (AWA, ARSA, LKRUA, & other clubs).

On shore, Alberta Parks has consistently improved the day-use and campground infrastructure, with the most recent capital investment of \$5.2million in 2020 (Calgary Herald 2018). This included paving parking lots, a new cookshelter, adding campsites, vault toilets, and a separate commercial put-in loop at Widowmaker. All of the improvements in Kananaskis Parks has made the Bow Valley corridor (Banff to Calgary) a highly sought after place to live, which in turn increases house prices and attracts talent to the area.

Job Creation:

Kananaskis Whitewater generates more than 100 direct jobs in guiding, instruction and coaching. The associated impact through tourism and retail sales will cycle through the local economy.

River Users:

Kananaskis Whitewater is visited by diverse groups of Albertans and non-Albertan tourists. Between all users it is estimated that at least 26,600 individuals spend 43,900 user days on the river.

- The commercial raft companies report 20,000 individuals per year
- 300 people participated in 600 user days of Commercial paddlesport and swiftwater rescue courses
- In paddlesports and surf there is a breakdown of Keeners (20 trips per year), Regulars (5 trips per year), and one-off visitors (once per year)
- 200 Keeners; 3300 Regulars; 2200 One-off
- 600 event specific trips

The consistent message heard through surveys and letters is that mental and physical well-being are the main reasons that people participate in whitewater activities. While the majority of participants visit between April and October, there is a surprising amount of recreational paddle and surf activity between November and March. The river never freezes over (due to daily on/off) and the ever reliable Chinooks allow river use year-round.



Annual Economic Impact Breakdown:

In this section is the breakdown of the \$32,000,000 annual impact.

Kananaskis Pass

Since June 2021 Kananaskis Parks users have paid \$15/day or \$90/year for a 'K-Pass', which goes into Parks' operating budget. We estimate that \$316,500 is contributed by river users annually.

- Most of the Raft clients park outside the park and bus in, so no K-Pass fees are paid.
- Commercial paddlesport clients contribute around \$9000
- Recreational and competitive paddlers make up \$264,000
- Surfing contributes \$34,500
- Event participants contribute and additional \$9000

Commercial Trip or Course

Commercial rafting and paddlesport instruction/guiding has a direct input of over \$3million dollars. *based on numbers from the businesses

- Rafting revenue - \$3,000,000
- Commercial paddlesport and swiftwater rescue training - \$105,000+

Associated photos & swag

Commercial operators report selling around \$60,000 in photos and trip related swag.

Transportation

Getting to and from the area has a significant cost. Aiming to just attribute travel directly related to river use, the total is \$3,691,678.

- Commercial clients - \$1,442,000
- Paddlesports - \$2,205,000
- Surf - \$409,500
- Events - \$31,5000

Food

Food related to the daily activities on the river for all participants equals \$1,721,000. This cost is largely a fixed cost per person, but where they spend that money affects local businesses in the Bow corridor.

Accommodations

A large purpose for destination development is to encourage people to stay in an area longer. In this case accommodations for river activities totals 1.4million.

- Commercial raft and paddlesports - \$1,262,000
 - Businesses report a large percentage of out of country visitors
- Paddlesports & Surf - \$93,500
- Canoe Meadows Campground - \$45,000

Recreational Equipment

Equipment for river sports is a significant expense for most river users. A total of 21.8 million dollars is spent on related gear.

- Raft – Fairly cheap per person ~\$1million
- Commercial paddlesports \$1.2million
- Recreational and competitive paddlesports – \$18.8million (3-6000/per)
- Surf - \$1million



Current (2024) situation

Kananaskis Whitewater's economy has grown into a strong vibrant community. Up to 2013 the flow conditions were very stable. After 2013 TransAlta and the Province of Alberta entered into a flood mitigation agreement whereby the Province gave TransAlta \$5million per year to maintain system reservoirs at predetermined low levels during flood season. The flood agreement has resulted in higher spring flows, which will require more frequent repair work and/or more robust features.

In 2024 the drought conditions meant that the Province needed further support from TransAlta, so they provided an additional \$2.5million/yr.

2024 saw two major factors affect Kananaskis Whitewater. Solar and wind have taken up a large portion of energy production during the day, causing prices in the unregulated energy market to increase in the evenings and night. TransAlta saw significant restructuring in late 2023, which has led it to focus solely on market factors for its scheduling. This led to flow scheduling that did not meet commercial or recreational needs, and it put all of the summer events (including the National Whitewater Championships) in jeopardy. The minister of Environment Rebecca Schulz had to step in and order TransAlta to provide consistent daily flows as well as event flows. This was done under the drought mitigation agreement and consistent with the clauses in the Dam License that allows the Minister to direct flows (Province of Alberta 1998).

Future risks or opportunities include: further climate change (amount of water and timing of freshet); dam infrastructure stability; dam operator's flow management; commercial operations; new sports or disciplines.

Further agreements will need to be developed in order to secure the long-term stability of Kananaskis Whitewater's economy.



Summary:

Kananaskis Whitewater has been developed with relatively low capital investment, when compared to the significant \$32 million annual economic impact. A diverse and vibrant river community has created an amazing partnership with the Province of Alberta and Alberta Parks to create and maintain this Tourism and Sport asset. Further policy will need to be developed to continue to improve water management, river access, and long-term solutions for river recreation in Kananaskis and Alberta as a whole.

**Authors & Contributors**

W. Michael Holroyd – Executive Director – Alberta Whitewater Association

Peter Crowe-Swords – Calgary River Users Alliance

Neil Egsgard – Alberta River Surfing Association

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Kananaskis Whitewater Economic Impact - Yearly

	# people	Trips ea	Total User days	K-Pass		Course/Trip cost		Photos/ Associated swag		Transport Mileage		Food		Gear needed		Accomodation		Total
Commercial																		
Raft	20,000	1	20,000	\$ -	\$ -	\$ 150.00	\$ 3,000,000	\$ 3	\$ 60,000	\$ 140	\$ 1,400,000	\$ 50	\$ 1,000,000	\$ 50	\$ 1,000,000	\$ 250	\$ 1,250,000	\$ 7,710,643
Paddle	300	2	600	\$ 15.00	\$ 9,000	\$ 350.00	\$ 105,000	\$ -	\$ -	\$ 140	\$ 42,000	\$ 30	\$ 18,000	\$ 4,000	\$ 1,200,000	\$ 200	\$ 12,000	\$ 1,390,720
Paddle rec/comp																		
Keeners	100	20	2,000	\$ 90.00	\$ 9,000	\$ -	\$ -	\$ -	\$ -	\$ 105	\$ 210,000	\$ 20	\$ 40,000	\$ 6,000	\$ 600,000	\$ -	\$ -	\$ 865,125
Regulars	3000	5	15,000	\$ 15.00	\$ 225,000	\$ -	\$ -	\$ -	\$ -	\$ 105	\$ 1,575,000	\$ 30	\$ 450,000	\$ 4,000	\$ 12,000,000	\$ 100	\$ 75,000	\$ 14,329,235
One-off further	2000	1	2,000	\$ 15.00	\$ 30,000	\$ -	\$ -	\$ -	\$ -	\$ 420	\$ 420,000	\$ 50	\$ 100,000	\$ 3,000	\$ 6,000,000	\$ 100	\$ 10,000	\$ 6,563,570
Surf rec/comp																		
Keeners	100	20	2,000	\$ 90.00	\$ 9,000	\$ -	\$ -	\$ -	\$ -	\$ 105	\$ 210,000	\$ 20	\$ 40,000	\$ 2,500	\$ 250,000	\$ -	\$ -	\$ 511,625
Regulars	300	5	1,500	\$ 15.00	\$ 22,500	\$ -	\$ -	\$ -	\$ -	\$ 105	\$ 157,500	\$ 30	\$ 45,000	\$ 1,500	\$ 450,000	\$ 100	\$ 7,500	\$ 684,235
One-off further	200	1	200	\$ 15.00	\$ 3,000	\$ -	\$ -	\$ -	\$ -	\$ 420	\$ 84,000	\$ 50	\$ 10,000	\$ 1,500	\$ 300,000	\$ 100	\$ 1,000	\$ 400,070
Events (all users)																		
Events (all users)	600	1	600	\$ 15.00	\$ 9,000	\$ 100.00	\$ 60,000	\$ -	\$ -	\$ 105	\$ 31,500	\$ 30	\$ 18,000	\$ -	\$ -	\$ -	\$ -	\$ 118,735
Campground																		
Campground																	\$ 45,000	\$ 45,000
TOTAL	26,600.00		43,900		\$ 316,500		\$ 3,165,000		\$ 60,000		\$ 4,130,000		\$ 1,721,000		\$ 21,800,000		\$ 1,400,500	\$ 32,593,000
	# people		Total User days		K-Pass		Course/Trip cost		Photos/ associated swag		Transport Mileage		Food		Gear needed		Accomodation	Total