



Canmore's Health and Wellness Sector Profile

Executive Summary and Conclusion



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Executive Summary

That as you ought not to attempt to cure the eyes without the head, or the head without the body, so neither ought you attempt to cure the body without the soul. Plato (427 BC
– 347 BC)

After six months of in-depth interviews, substantial secondary research, meetings with key community health and wellness leaders, and presentations to stakeholders within the Canmore community, the extensive Phase 1 of Canmore’s three-phase Health and Wellness Project is now completed with the submission of this final report.

As health and wellness is an emerging industry, findings suggest that Canmore has exceptional potential to become a world leader as a ‘healthy community.’ Through strategic planning and community support Canmore could potentially brand and market itself as a health and wellness destination. Its unique mountain environment naturally makes Canmore an ideal place for healthy living—and healing. By expanding into ‘wellness,’ Canmore can more effectively connect both residents and visitors with both existing and new health and wellness assets.

Healthy community development can be strategically cultivated through business development and incubation of the health and wellness industry. Rather than competing against tourism and resort development, two of Canmore’s existing economic engines, health and wellness can be integrated into all of the community’s existing economic drivers and sectors as well as the community’s programs and services. The goal here would not be to compete for market share, but to have existing sectors broaden their scope to include health and wellness in their agendas. The key, however, to Canmore’s success in this initiative will be the networking and linking of different economic sectors within the community as well as businesses, service providers, and other community initiatives and programs.

Situated in a mountain environment next door to Banff National Park—a major international attraction that has received over 4,000,000 visitors since 1996—Canmore provides a “healing” natural environment for those seeking body, mind, or soul rejuvenation, whether they call Canmore home or come from afar. Serving up a lifestyle of adventure, inspiration, and discovery, Canmore appeals to a community of health-minded and active individuals. A high level of access to communications technology makes it easy for people to come and live, visit, or set up a business in Canmore.

If Canmore is to become a world-renowned leader in health and wellness, its existing model of health and wellness provision will require modification. Strategic planning, vision, and clear identification of goals will be needed in order to link Canmore’s numerous health and wellness resources, bridge opposing mindsets (conventional vs. alternative), build relationships, develop health models, and create industry labour structures. Customer/patient experience as part of the product must also be considered. All of these elements are necessary in order for Canmore to truly become a world-renowned leader in health and wellness.

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Canmore enjoys a strong representation of professionals and talent, facilities, and support resources in a setting conducive to health and wellness. In addition, there appears to be strong community grassroots support for leveraging Canmore's existing assets into a health and wellness community. These are promising indicators, but the community's health and wellness sector is fragmented, due to several factors, such as lack of awareness of the many different modalities provided in both conventional and alternative medicine in Canmore, lack of accountability (e.g., no set level of expertise) in some modalities, and others.

An asset inventory conducted as part of this study proves you really can "do more, play more, live more" in Canmore. It is from this foundation that Canmore can make great breakthroughs in health and wellness, building an industry sector that is united, integrated, and sustainable. This report is provided as a resource to help the community influence the direction of such an economic development initiative.

The first phase of this three-phase project was extensive in its research, all of which was carefully selected for its relevance to the Canmore situation. The resulting information ranged from local success stories in Canmore's health and wellness sector to national and international trends and initiatives in health and wellness and community economic development.

Specifically, Phase 1 of the project included:

- Developing a *Preliminary Health and Wellness Sector Profile* for Canmore and area, which included the following:
 - Overview on the Canadian health and wellness industry.
 - Complementary (alternative) health snapshot.
 - Listings and descriptions of the many and varied types of health and wellness providers and practitioners.
 - A health and wellness asset inventory for Canmore and area.
 - Six local health and wellness business success stories.
 - A listing of specific challenges and opportunities for the community of Canmore's consideration.
- Presenting the findings of the preliminary study to community stakeholders at Canmore's Health and Wellbeing Summit in the Rockies held in November 2007.
- Providing a snapshot of three subsectors of the health and wellness industry with particular relevance to Canmore:
 - Physical fitness and sport.
 - Spas (destination, resort, and medical spas).
 - Resort and wellness lifestyle communities.
- Researching and documenting three relevant business case models with significant relevance to Canmore, including:
 - Hawaii Health Guide.
 - Temple Gardens Mineral Spa Resort Hotel.
 - Carolina Preserve Initiative.

Key assets identified in an inventory of Canmore's health and wellness talent, facilities, and other resources show it is an already well-developed industry sector within the community. Canmore boasts a high ratio of doctors to patients (one doctor to 219 patients, well above Alberta's 2006 provincial average of one doctor to 467 patients), has six family

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medical clinics plus numerous alternative therapy facilities, claims its own hospital with emergency services, and benefits from world-recognized medical professionals practicing in both conventional and alternative medical disciplines.

Wellness is high on Canmore's list, evidenced by a great number of fitness and recreation resources and an incredible range of wilderness activities. After a day of exercise, residents and visitors alike can head to one of Canmore's many spas, where they can be treated to a relaxing massage, cosmetic treatment, or aromatherapy session. A highly developed arts and culture sector adds balance, nurturing the needs of mind and spirit.

A caring community, Canmore offers almost 60 social programs and resources for residents in some kind of need. Snow shovelling for seniors and disabled persons, resources for mental health and serious diseases, and housing assistance are just a few of the supports available to the people of Canmore. Even animals are well cared for in Canmore, with nine veterinarians and one clinic that helps out with wildlife rehabilitation.

In addition to an asset inventory for health and wellness in the Canmore area, an overview of the Canadian health and wellness industry is included as well as snapshots on selected industry trends, including public health care, complementary (alternative) health care, and integrated health care. As well, snapshots of three health and wellness industry sectors of importance to Canmore are included, namely the physical fitness and sport sector, the cosmetic, anti-aging and rejuvenation sector, and, the resort, recreation and adventure spas sector.

Finally, three business models of relevance to the Canmore situation were also examined. The findings from this research is introduced in Section 7 and presented in a stand-alone document in Appendix D, *Canmore's Health and Wellness Project: Business Case Models*. In this study the Hawaii Health Guide, Temple Gardens Mineral Spa Resort Hotel, and the Carolina Preserve Initiative all offer many lessons and strategies for the community of Canmore to consider when developing and branding itself as a healthy community.

The Canadian health care situation is one of rising costs, largely due to escalating costs of technology and delivery, aging baby boomers, and longer life expectancies—all putting heavy burdens on our conventional health care system. By embracing a huge economic opportunity (global health care is projected to be a \$1 trillion industry by 2010), Canmore is poised to help remedy this looming crisis by further developing its health and wellness sector, particularly by taking an integrated approach.

While several different levels of integrated health are possible, the ideal level embraces the patient as a "whole person," and addresses physical, mental, spiritual, and environmental aspects of health and wellness by working in a team scenario where physicians and surgeons work alongside professionals from other modalities, such as chiropractors, naturopathic doctors, physical therapists, mental health counsellors, etc. While this integrated approach to health care is steadily gaining in popularity with Canadian health care consumers, government health care funders as well as private and public insurers are lagging behind considerably when it comes to accepting this integrated health care concept.

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An economic trend worthy of Canmore's attention is Lifestyles of Health and Sustainability, or LOHAS. Driven by "cultural creatives," "solution seekers," and "conscious consumers" largely from the baby boomer demographic, LOHAS describes an estimated \$209 billion U.S.A. marketplace for goods and services in six sectors, personal health being one of them. Making buying decisions based on conscientious social and cultural values, such as economic and environmental sustainability, "Lohasions" seek natural and organic products, nutritional products, integrated health care, dietary supplements and mind, body, and spirit health-related products. Canmore, with its mountain culture and environmental splendour, is a community where socially conscious LOHAS consumers and businesses could reasonably be expected to gravitate.

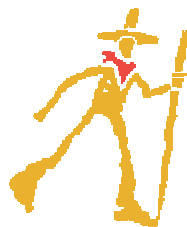
It almost goes without saying that today's baby boomers are also driving a new industry associated with spas and anti-aging services. Couple these trends with sports and fitness related activities and events that attract almost all age groups and you get a host of health and wellness related economic and social opportunities. These three trends can also be leveraged in such a way as to support Canmore's two main industries, tourism and real estate development and construction, while building a healthy community in a general sense.

In addition to these significant trends currently available for Canmore to consider and act upon, becoming a leader in health and wellness would be good for the overall community. Added-value components to developing Canmore into a world-renowned leader in health wellness include significantly increasing the quality of life for Canmore's residents and guest patients/clients, all while helping create a sustainable industry on which medical professionals, staff, and other support businesses can depend.

The natural next steps for the community of Canmore would be to follow through on the next two phases of the Canmore Health and Wellness Project (outlined in more detail in the conclusion of the report), namely:

- **Phase II** – Develop business development and investment attraction strategies.
- **Phase III** – Implement business development and investment attraction strategies.

Since its heydays as a mining town and venue host for the 1988 Winter Olympics, it's time Canmore reached a new level of excellence. By capitalizing on national and international health and wellness trends, Canmore has an incredible opportunity to coordinate economic activity, both new and existing, and move towards branding as a 'healthy community' benefiting residents and visitors alike.



Conclusion

After six months of in-depth interviews, substantial secondary research, meetings with key community health and wellness leaders, and presentations to stakeholders within the Canmore community, the first phase of Canmore's Health and Wellness Project is now completed with the submission of this final report.

Research and review of the Canmore Health and Wellness Asset Inventory indicates that Canmore has a high degree of assets in relation to number and quality of health and wellness practitioners, services, and facilities. As health and wellness is an emerging industry, findings suggest that Canmore has exceptional potential to become a world leader as a 'healthy community,' and through strategic planning and community support potentially brand and market Canmore as a health and wellness destination. Its unique mountain environment naturally makes Canmore an ideal place for healthy living—and healing. By expanding into 'wellness,' Canmore can more effectively connect both residents and visitors with both existing and new health and wellness assets.

Healthy community development can be strategically cultivated through business development and incubation of the health and wellness industry. Rather than competing against tourism and resort development, two of Canmore's existing economic engines, health and wellness can be integrated into all of the community's existing economic drivers and sectors as well as the community's programs and services. The goal here would not be to compete for market share, but to have existing sectors broaden their scope to include health and wellness in their agendas. The key, however, to Canmore's success in this initiative will be the networking and linking of different economic sectors within the community as well as businesses, service providers, and other community initiatives and programs.

Whatever term is embraced by the community—health tourism, healthy community, health and wellness destination, or some other descriptor—a dynamic form of wellness in the community (e.g., development of lifestyle wellness resorts, expansion of sporting events, consideration of a medical spa, etc.) can enhance and diversify Canmore's existing economy, benefiting both residents and visitors in a myriad of ways.

The participants at Canmore's November 2007 Health and Wellbeing Summit in the Rockies identified and discussed a number of potential options for expanding the health and wellness industry in Canmore and the area. Two primary themes surfaced as being a 'fit' for the region:

- **Wellness Alliance** – An informal group of community participants which could provide important connections for local services as well as take on market-enhancing initiatives, such as a health and wellness service directory, a website for destination promotions, a wellness concierge concept, or an education and awareness program. (At the time of completing this report in February 2008, a Wellness Alliance group was already a functioning body.)

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- **Health Campus** –A health campus concept was seen as a way to develop and nurture Canmore’s health and wellness sector. Discussion included a ‘bricks and mortar’ integrated health centre, a medical teaching facility, and practitioner, health region partnerships with satellite campuses which could include educational institutions and organizations based elsewhere. Discussions at the Summit also revolved around the ‘community’ serving as a base, where health and wellness issues and initiatives could take place in and around the community in existing facilities or at existing events.

As this project proceeded, changes were made to its original scope and deliverables. A major change involved researching other communities’ success stories that were applicable to the Canmore situation instead of developing a SWOT (strengths, weaknesses, opportunities and threats) analysis and gap analysis for Canmore’s health and wellness sector. This new information is presented as a stand-alone document, *Canmore’s Health and Wellness Project: Business Case Models* that is discussed in Section 7 and attached in Appendix D of this document.

However, as a result of these changes to project scope, new research informed the project and presented even more opportunities for the community to consider. A presentation was made to the Wellness Alliance in February 2008, where this group reviewed the following three ‘best practice’ business models:

- Hawaii Health Guide.
- Temple Gardens Mineral Spa and Resort Hotel.
- Carolina Preserve Initiative.

All three of these business case models began as a singular project but later expanded to encompass a broader vision by linking into other sectors and industries. There are lessons for Canmore to learn from this, the most important being the need to integrate and link to existing community groups and initiatives instead of operating as yet another independent, or “silo,” initiative. Findings also suggest that the community of Canmore is well positioned to consider health and wellness as a core concept and one to which all other sectors and initiatives can easily link. For example, environmental, social, cultural, fitness, sports, and other types of initiatives and projects can all easily link to the notion of building a healthy community.

Additional findings applicable to Canmore from the three selected business case models include:

- Broadening the scope of health and wellness in Canmore by expanding into other sectors rather than developing as a stand-alone sector or industry.
- Building and linking existing sectors and the assets, services, products and resources that are presently disconnected or indirectly linked into a brand that promotes Canmore as a healthy community to both residents and visitors. By developing Canmore as a healthy community, links could be made to existing attractions and services, such as those involved in eco-tourism, adventure tourism,

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cultural tourism, and more.

- Linking selected agents of change from various levels of government, health care, complementary medicine, tourism, hotel accommodation, arts and culture, and academic sectors and collaborating on ways to incorporate and network health and wellness into their respective mandates, and agendas.
- Branding Canmore as a ‘healthy community’ should include all components of health and wellness being incorporated into every fibre of the community, from schools and parks to sports, eco-tourism, and building developments.

However, these are just a few examples of what Canmore could do to promote its health and wellness industry. InnoVisions *and Associates* strongly recommends that the community of Canmore expand on the concept of developing an active and effective group, the Wellness Alliance, by embracing a phased approach for its next steps:

Phase I: Complete a Sector Profile and Asset Inventory

- Completed (on submission of this report).

Phase II: Develop Business Development and Investment Attraction Strategies

- Clearly define a community-based vision of health and wellness for Canmore, working within existing frameworks developed by the community.
- Propose several business development and investment attraction strategies to realize the vision, e.g., business retention and expansion strategies.
- Obtain community consensus for the business development and investment attraction strategies.
- Develop strategies for two or three selected projects, such as:
 - Online health and wellness directory.
 - Health festival associated with a second annual *Summit in the Rockies* event.
 - Health agenda incorporated into a major sporting event, e.g., Master’s World Cup 2009(skiing).
 - Other.

Phase III: Implement Business Development and Investment Attraction Strategies

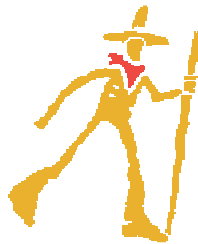
- Support local business and industry expansion into Canmore’s health and wellness sector.
- Support a “healthy community” brand.
- Develop business plans, as needed.

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Canmore can become a world leader in health and wellness, one that is renowned as a healthy community as well as a destination of healing and wellness. By developing a clear vision and strategy to brand Canmore as a 'healthy community,' Canmore stands to improve the physical and mental health of community residents, attract professionals and workers, and support the development of a new and growing trend in health care that focuses on serving both visitors and tourists alike.

As Canmore strives for healthy community development, the potential is strong to build bridges and links to many already existing sectors and initiatives in the community, from environment and sports to tourism and culture. By building these inter-related links and bridges, Canmore's various sectors of special interest could be strengthened, perhaps even revitalized, making them less dependent on seasonal activities and events, which, in turn, helps to build a strong, stable and healthy community.

By working with the community's existing strategies, particularly the Canmore Community Sustainability Plan, Canmore is well poised to leverage its existing health and wellness assets. The benefits of fueling Canmore's economic engine with a health and wellness initiative could be substantial, from providing a focus for all economic, social, and environmental sectors of the community to providing a better quality of life for its residents for many years to come.



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