



Drumheller & District
Chamber of Commerce



TOWN OF DRUMHELLER
703 2 Avenue West
Drumheller, AB T0J 0Y3

TIBRE Drumheller



OVERVIEW

- TIBRE Project Initiative
- The Tourism Industry
- Tourism in Drumheller
- Results

TIBRE Project Initiative

What is TIBRE?

- Definition:
 - Tourism Industry Business Retention and Expansion Program (TIBRE)
- Purpose:
 - To assess the health and intentions of tourism businesses, and identify issues and opportunities
- Project Committee, includes representatives from:
 - Local organizations such as the Town of Drumheller, Drumheller Chamber of Commerce, Tourism Drumheller, with the assistance of other economic development organizations
 - Alberta Culture and Tourism

About the TIBRE Program

- Firm Visitation: The heart of the TIBRE program is to identify existing tourism businesses and visit them to assess the health and intentions of the businesses.
- Data Collection: The primary tool of the visitation portion of the TIBRE program is a questionnaire which will be filled out by the interviewers during the visit.
- Follow-up: The TIBRE program has the potential to identify firms that need additional follow-up. Following the visit, the interviewers will assess if the business needs any immediate follow-up to assist with either retention issues or expansion opportunities
- Reporting: The data that is collected from the TIBRE survey's will be aggregated, along with other data available to Tourism Division's research unit (e.g. PRISM data, occupancy, etc.), will be put into a community report.
- Reflection: Once the data has been reported, there will be an opportunity for the community and the TIBRE partners to consider next steps in support of the tourism industry in their municipality.

Visitation and Data Collection:

- The local TIBRE Project Committee recruited volunteers and invited tourism businesses to participate in the program
- Volunteers interviewed the business owner/operators to ask about their business operations and identify retention issues or expansion opportunities for follow-up
- The data collected was entered into a database, aggregated and analyzed by Alberta Culture and Tourism

The Tourism Industry

What is Tourism?

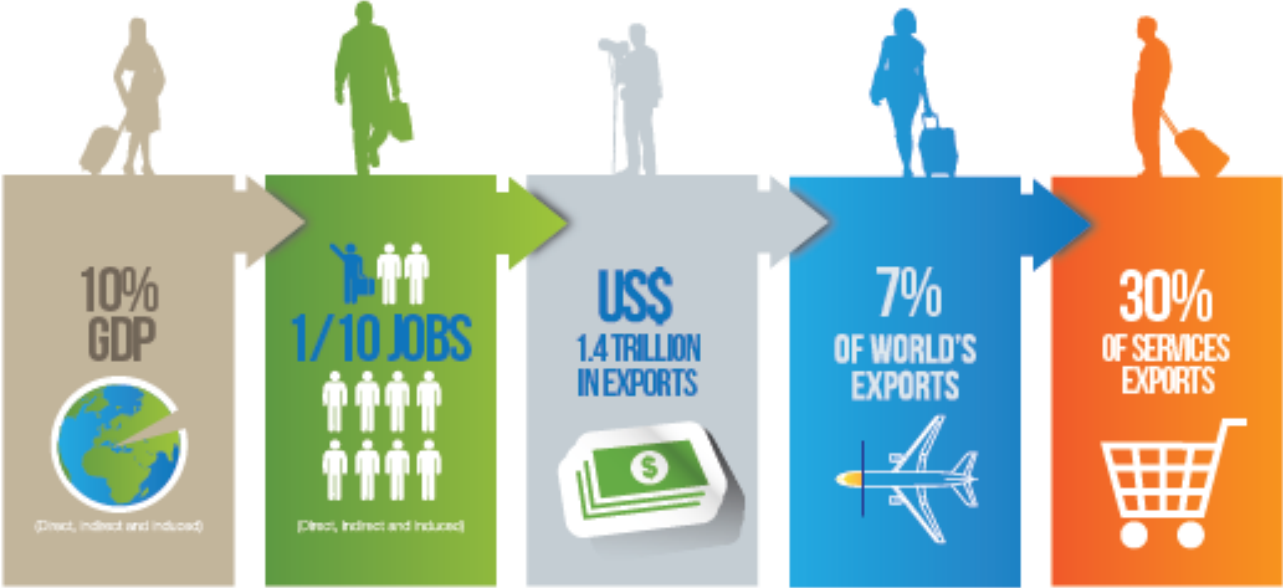
Definition:

“The activity of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes ... A tourism trip occurs when visitors take an overnight trip, or a same-day trip of more than 40 km (one-way) outside of their home community”. (source UNWTO; Statistics Canada)

Tourism is an industry of industries

“Tourism is a collection of activities, services and industries that delivers a travel experience, including transportation, accommodations, eating and drinking establishments, retail shops, entertainment businesses, activity facilities and other hospitality services provided for individuals or groups traveling away from home.” (source: Northern Arizona University, ecotourism course material)

Global Tourism Industry



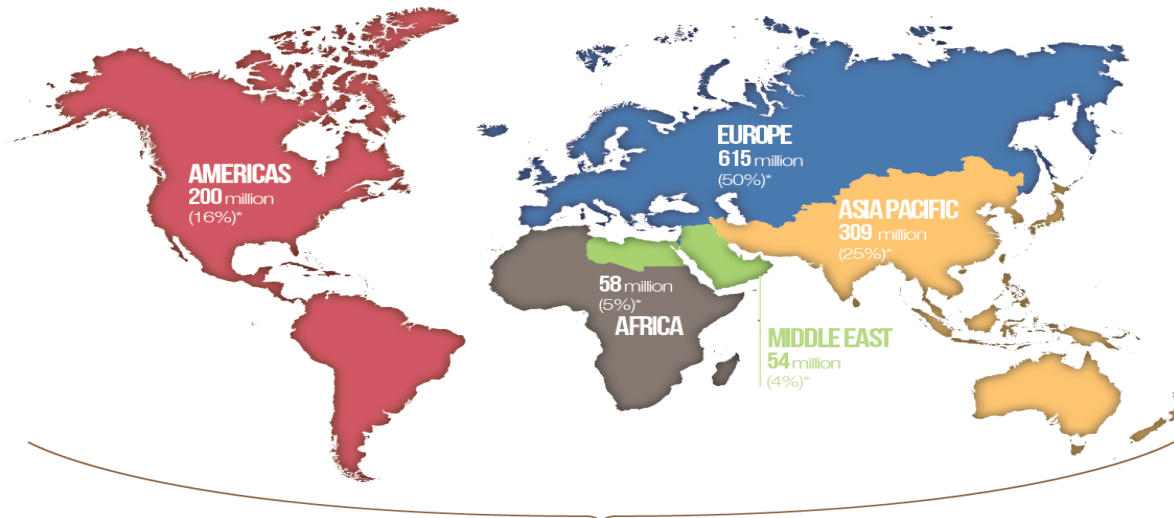
WHY TOURISM MATTERS

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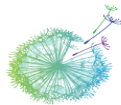
Global Tourism Industry

INTERNATIONAL TOURIST ARRIVALS 2016

*Share (%)



WORLD: 1,235 MILLION



2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT



UNWTO

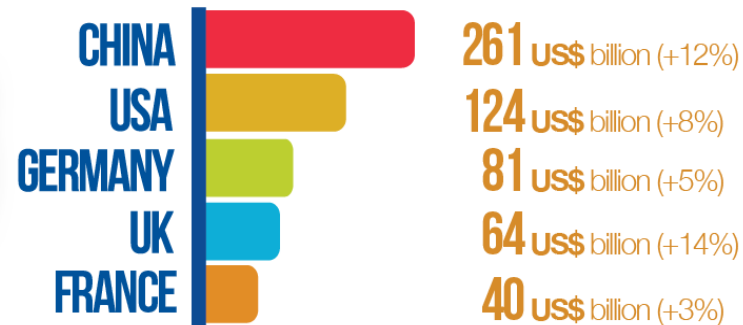
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Global Tourism Industry



WORLD'S TOP TOURISM SPENDERS

INTERNATIONAL TOURISM EXPENDITURE 2016



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Canada's Tourism Industry

Traveller's to Canada by country of origin top 15 countries (2015)

Country of origin ¹	2015 Overnight trips		
	Trips	Nights	Spending in Canada
	thousands		C\$ millions
United States	12,669	54,205	7,761
United Kingdom	686	8,310	972
China	483	15,078	993
France	477	7,726	676
Germany	325	6,536	600
Australia	291	5,139	790
Japan	260	3,427	465
India	200	7,091	359
Mexico	190	2,774	330
Korea, South	177	3,177	252
Hong Kong	142	2,164	193
Italy	126	1,415	152
Netherlands	119	1,682	214
Switzerland	115	1,706	240
Brazil	112	2,544	232

1. May include more than one country.

Source: Statistics Canada, Tourism and the Centre for Education Statistics.

Last modified: 2016-11-01.

Economic Impact of Tourism in Alberta

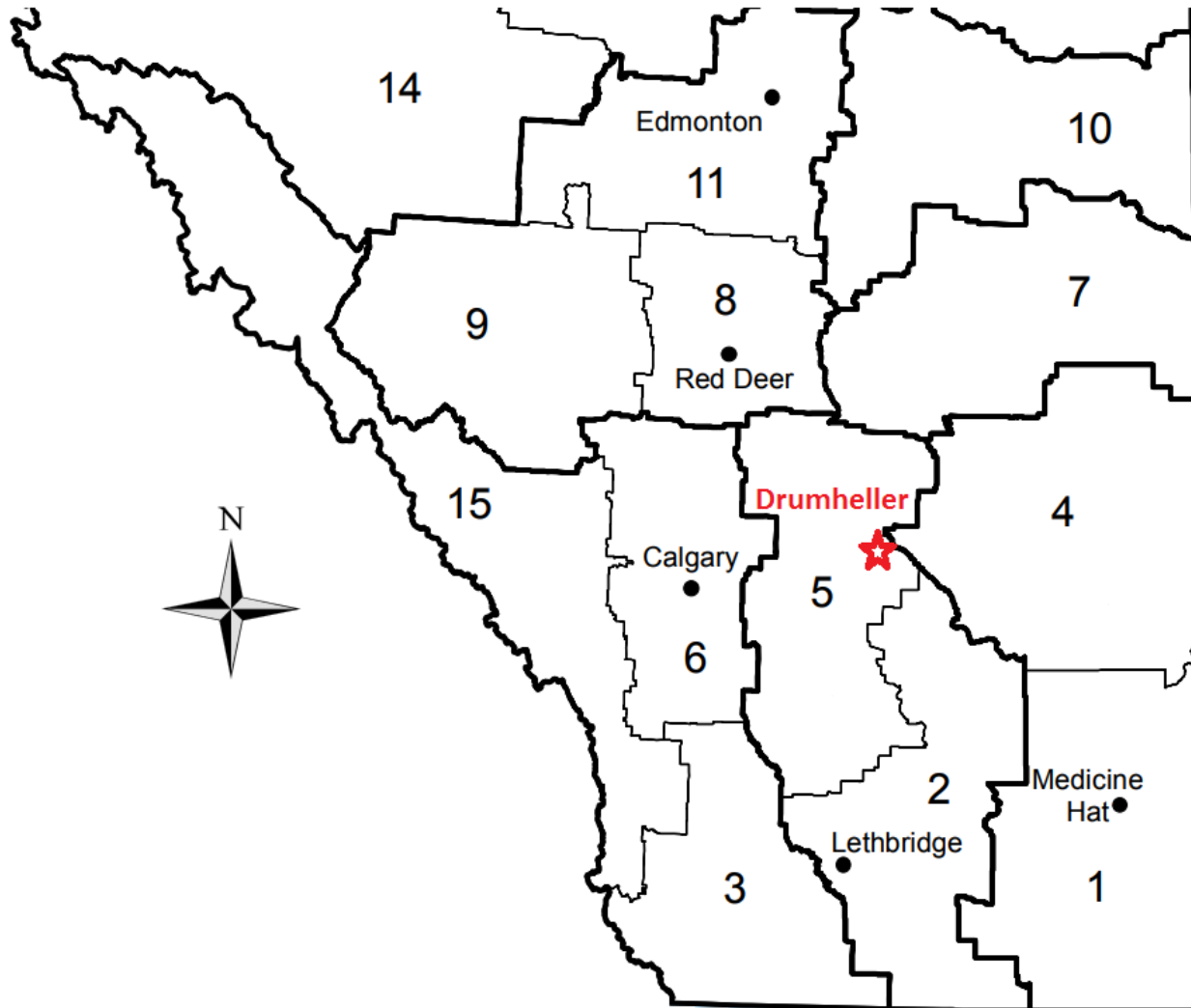
- \$8.1 billion in visitor spending (2015)
- \$9.3 billion to Alberta's GDP (2015)
- \$4.1 billion in federal/provincial/local tax revenue (2015)
(\$ 2.4 billion federal, 1.2 billion provincial and \$508 million local)
- 127,000 full-time direct and indirect jobs (2015)
- 19,000 tourism businesses (2015)

Sources: Statistics Canada; Econometric Research Limited



Tourism in Drumheller

Census Division 5



Census Division 5

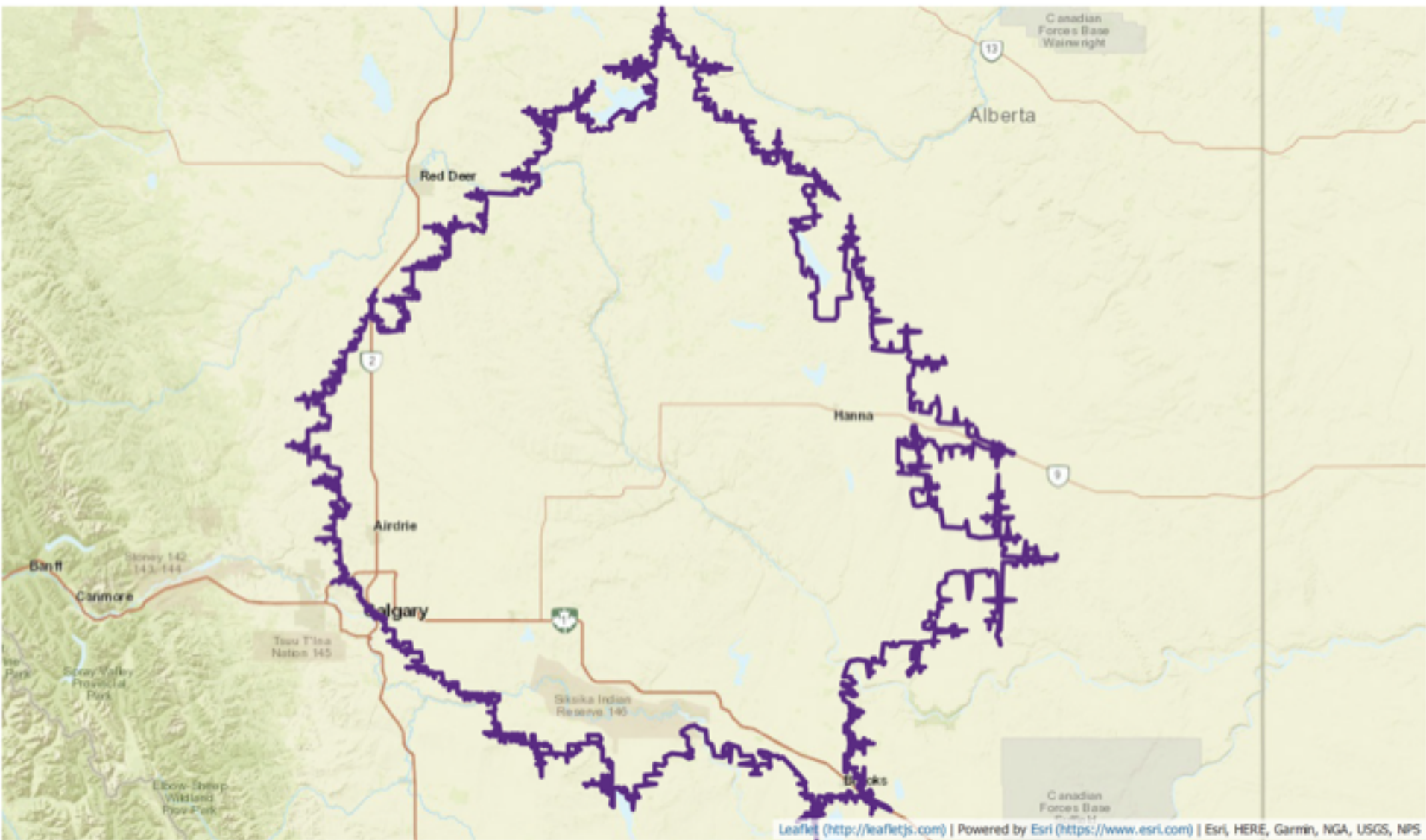
Source: STATISTICS CANADA				
	2012	2013	2014	2015
Person Visits Census Division 5	784,022	782,550	706,076	749,190
Expenditure Census Division 5	\$ 72,407,672	\$ 64,117,658	\$ 60,207,127	\$ 66,006,723

Person Visits by Length of Stay 2015		
	<i>Same Day</i>	<i>Overnight</i>
Census Division 5	564,525	184,665
	75%	25%

Expenditure by Length of Stay 2015		
	<i>Same Day</i>	<i>Overnight</i>
Census Division 5	\$34,027,803	\$31,978,920
	52%	48%

LOCAL MARKET STATISTICS

	DRUMHELLER	DRUMHELLER + 1.5 HOURS	ALBERTA
# of Households	3,434	187,050	1,627,993
Population	8,881	549,798	4,297,547
Median Age of HH Maintainer	53	47	47
Av. Household Income	\$102,602	\$108,913	\$127,468
Own their Homes	79%	80%	74%
Apprenticeship/Trades Certificate	13%	10%	10%
University Degree	16%	18%	24%
In the Labour Force	73%	72%	73%
In Sales and Service Occupations	22%	18%	15%



Royal Tyrrell Museum 2017

Total Visitors = 489,250

Top 10 Countries	# of Visitors	Percentage
Canada	432,512	88.4%
United States	16,244	3.3%
United Kingdom	4,738	0.96%
Germany	3,352	0.69%
Australia	3,023	0.62%
China	2,373	0.49%
Netherlands	1,768	0.36%
Mexico	1,307	0.27%
France	1,078	0.22%
Denmark	968	0.2%

Royal Tyrrell Museum 2017

Total Visitors = 489,250

Top Provinces	# of Visitors	Percentage
Alberta	290,169	67.38%
British Columbia	44,555	10.35%
Ontario	31,164	7.24%
Saskatchewan	29,434	6.84%
Manitoba	15,092	3.50%
Quebec	8,746	2.03%

Top Cities/Areas	# of Visitors	Percentage
Calgary	119,080	41.04%
Edmonton	55,400	19.09%
Langdon area (incl. Drumheller)	10,136	3.49%
Airdrie	9,327	3.21%
Red Deer	8,171	2.82%
Spruce Grove (incl. Parkland County)	5,271	1.82%
Medicine Hat	4,178	1.44%
Lethbridge	4,107	1.42%

LOCAL Statistics

	2016	2017
World's Largest Dinosaur	129,897	126,227
Visitor Information Centre	57,805	57,270

	Person Tours	Visitors
Atlas Coal Mine 2017	30,004	25,251

LOCAL Statistics

Kneehill County Survey 2017 Respondents	Count	Percentage
Alberta	780	59.18%
Ontario	184	13.96%
British Columbia	153	11.61%
Saskatchewan	84	6.37%
Manitoba	43	3.26%
Quebec	30	2.28%
New Brunswick	18	1.37%
Nova Scotia	14	1.06%
Newfoundland and Labrador	11	0.84%
Northwest Territories	1	0.08%
TOTAL	1,318	100%

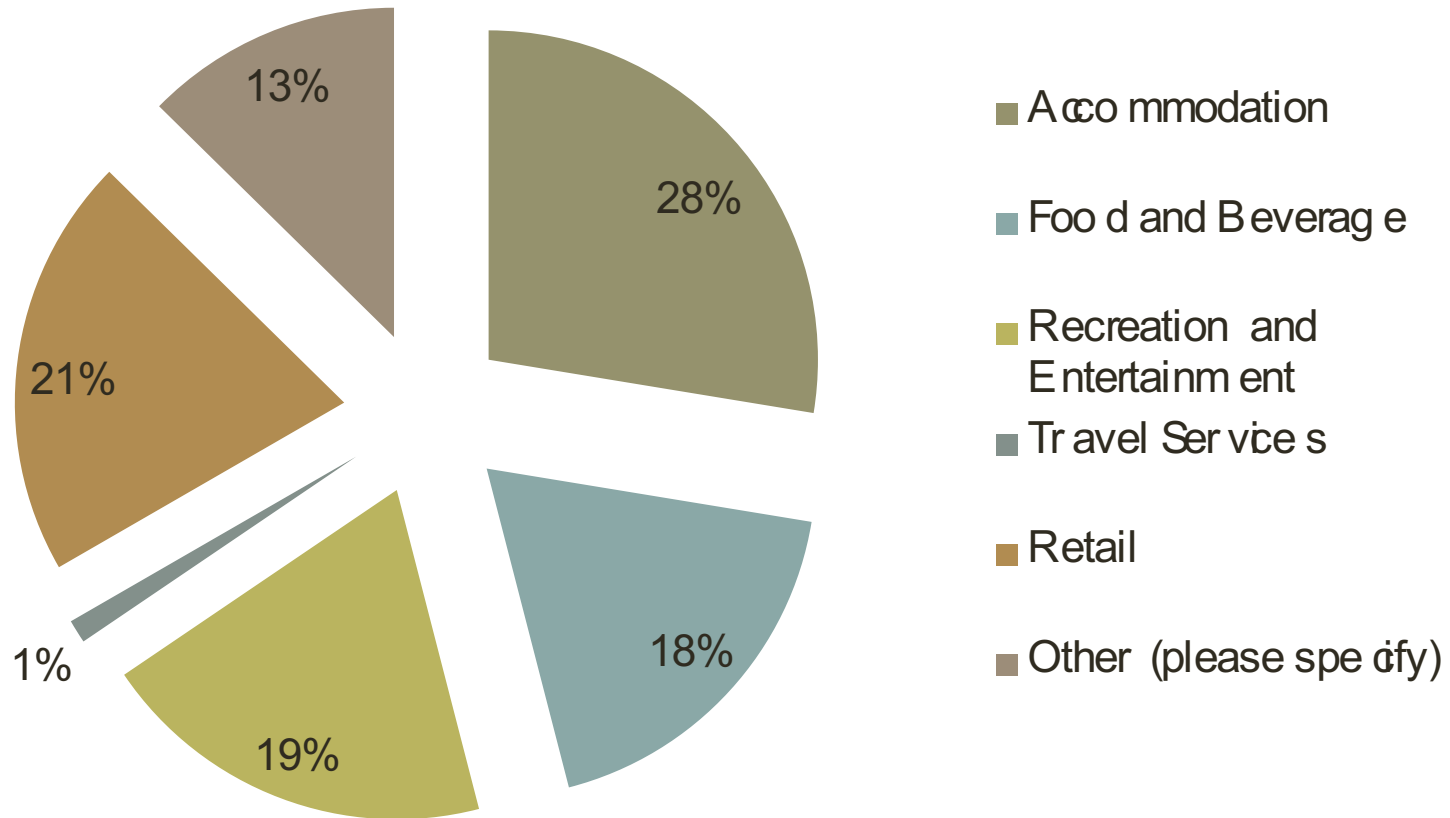
TIBRE Results

TIBRE Drumheller

- **We invited 108** tourism businesses in the Drumheller area participate in the TIBRE Drumheller project – **87 agreed** – an **81%** response rate
- **22%** of Drumheller's business licenses in 2017 were issued to tourism businesses
- TIBRE interviews were conducted **April 2 – May 28, 2018**
- The average amount of time spent – **20-25 minutes**
- **19** volunteers – attended training and conducted interviews for a total of **219 volunteer hours**

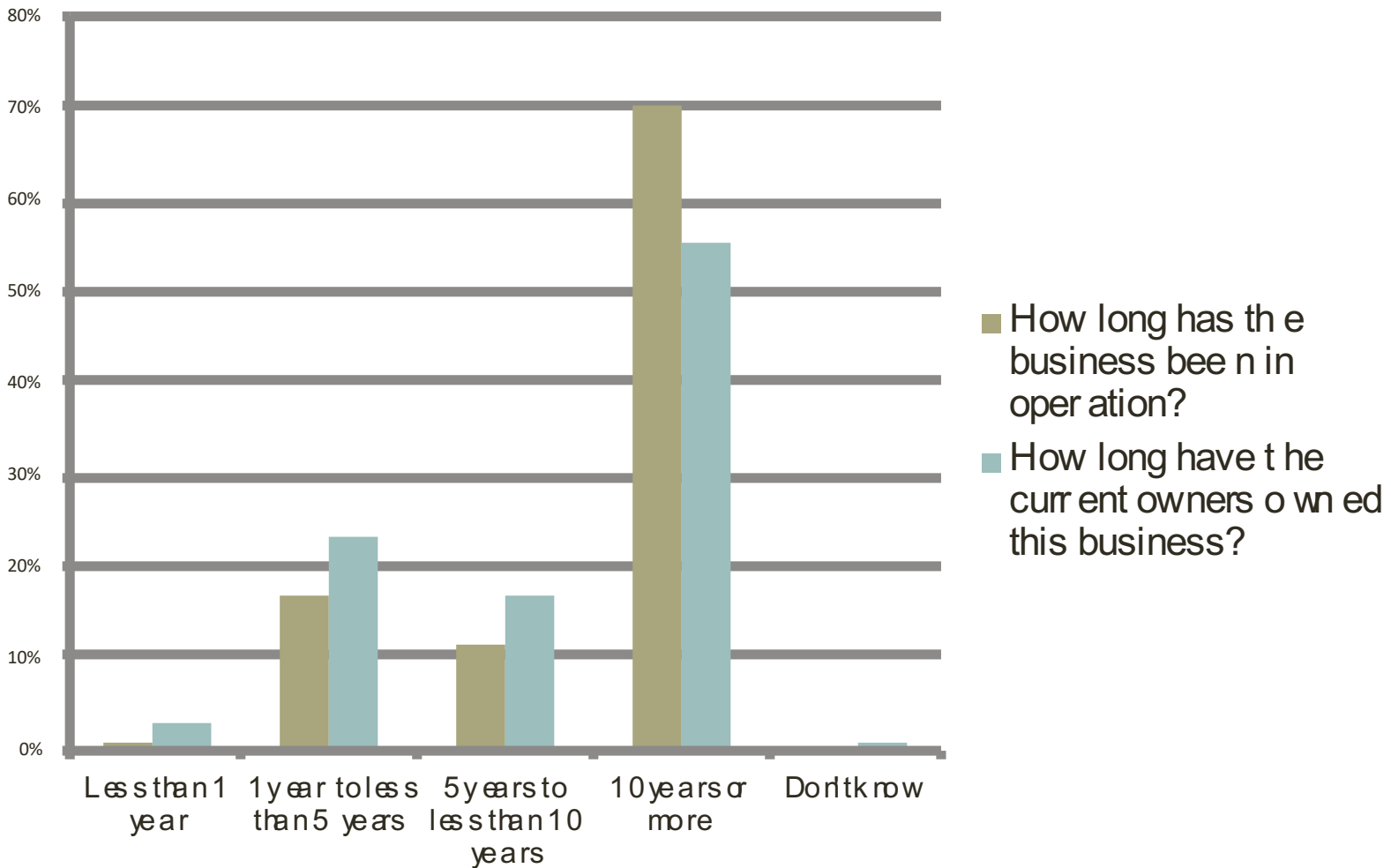
What is the nature of your business?

Answered: 87 Skipped: 0



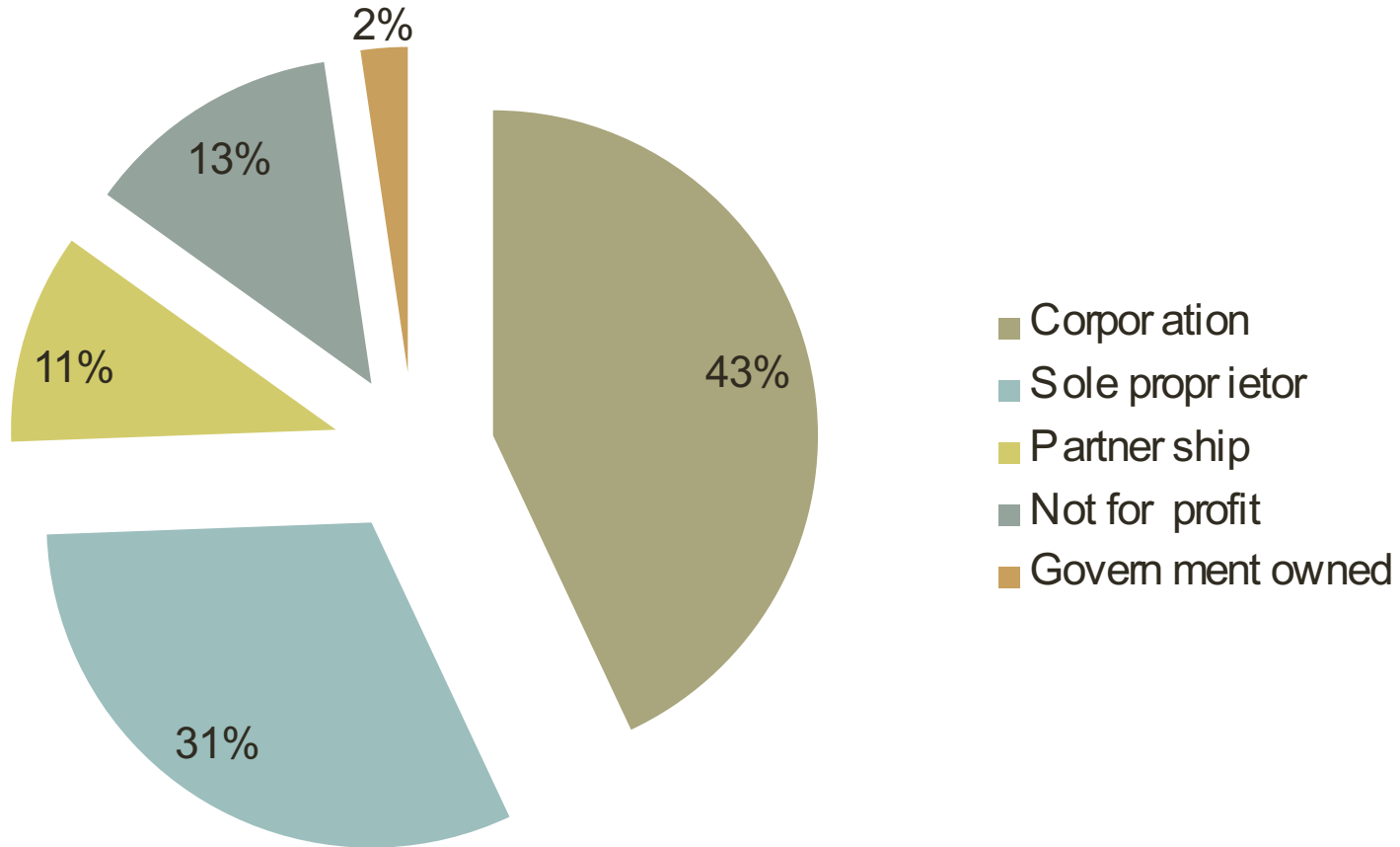
How long in operation and under current ownership?

Answered: 87 Skipped: 0



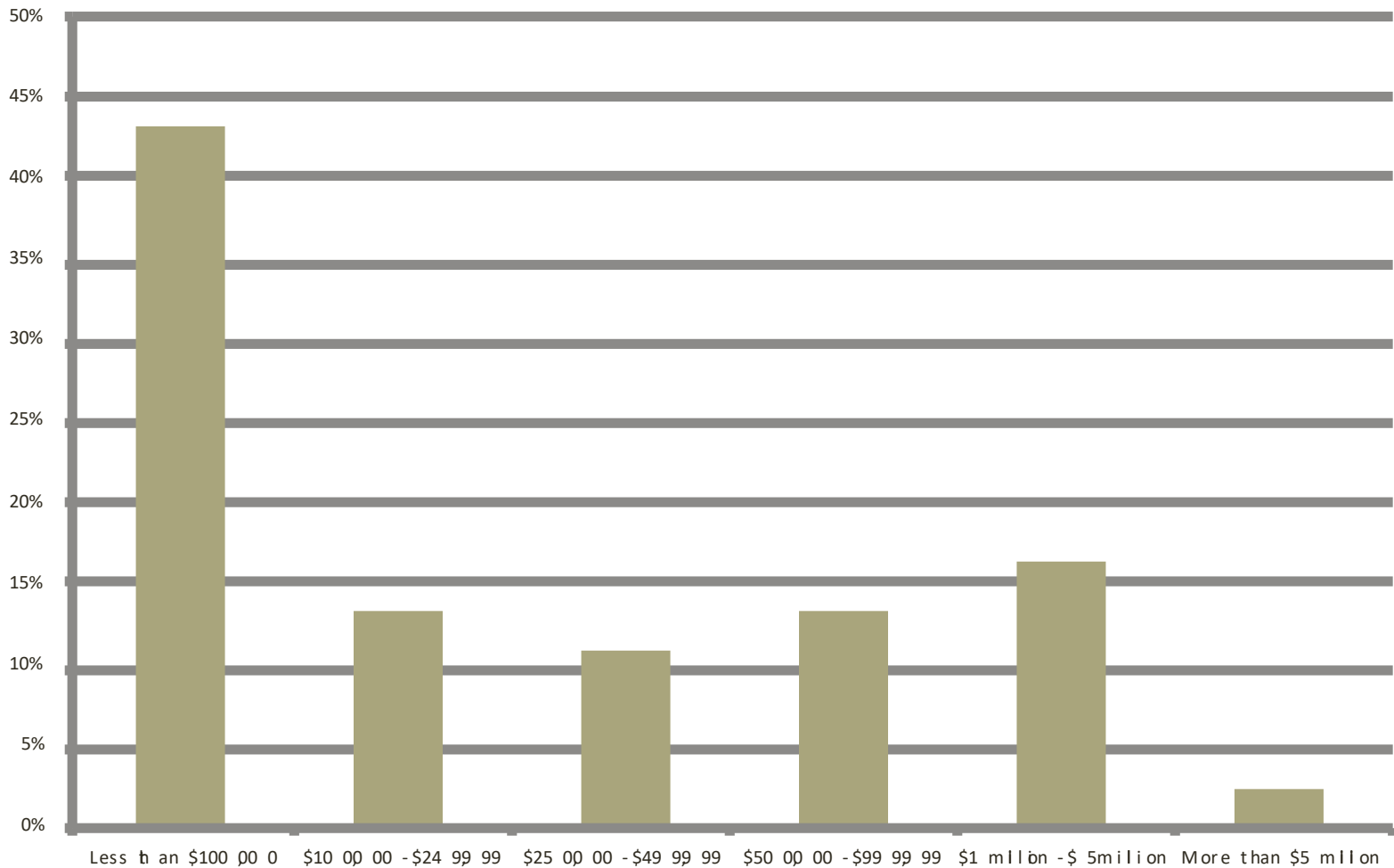
How is the business registered?

Answered: 86 Skipped: 1



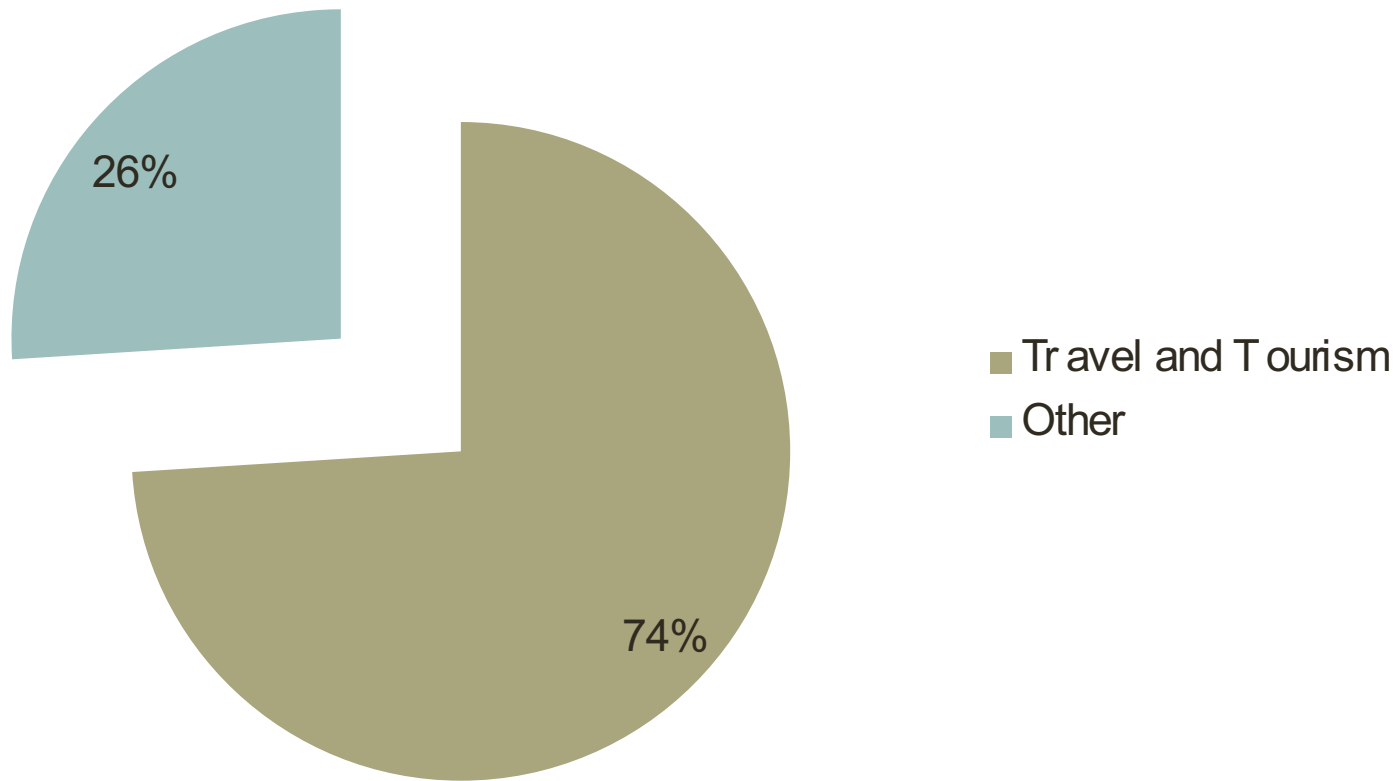
What is the average annual revenue?

Answered: 74 Skipped: 13



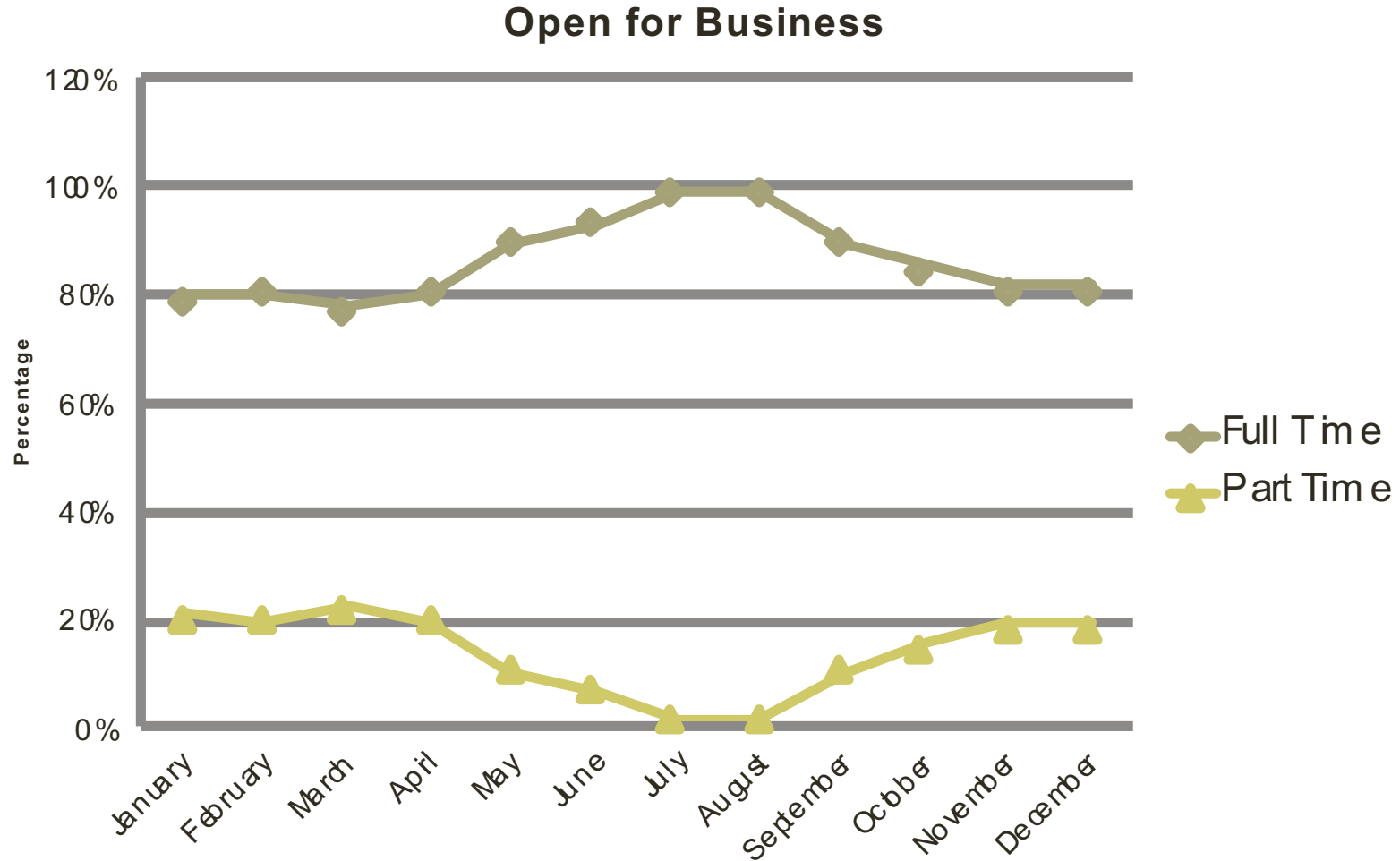
What percentage of business is attributed to travel and tourism?

Answered: 87 Skipped: 0



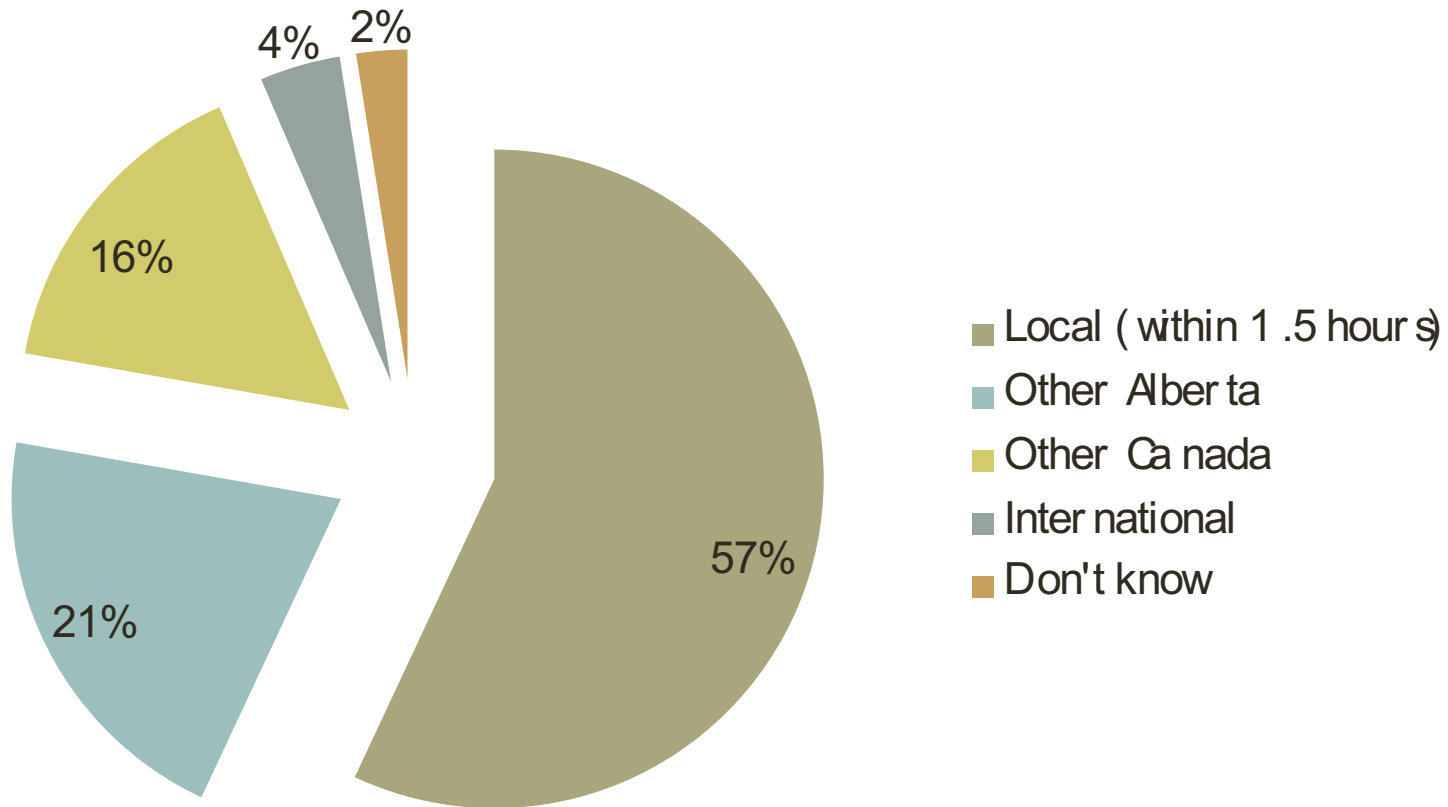
Months of operation – full time and part time

Answered: 87 Skipped: 0



Where do your visitors come from?

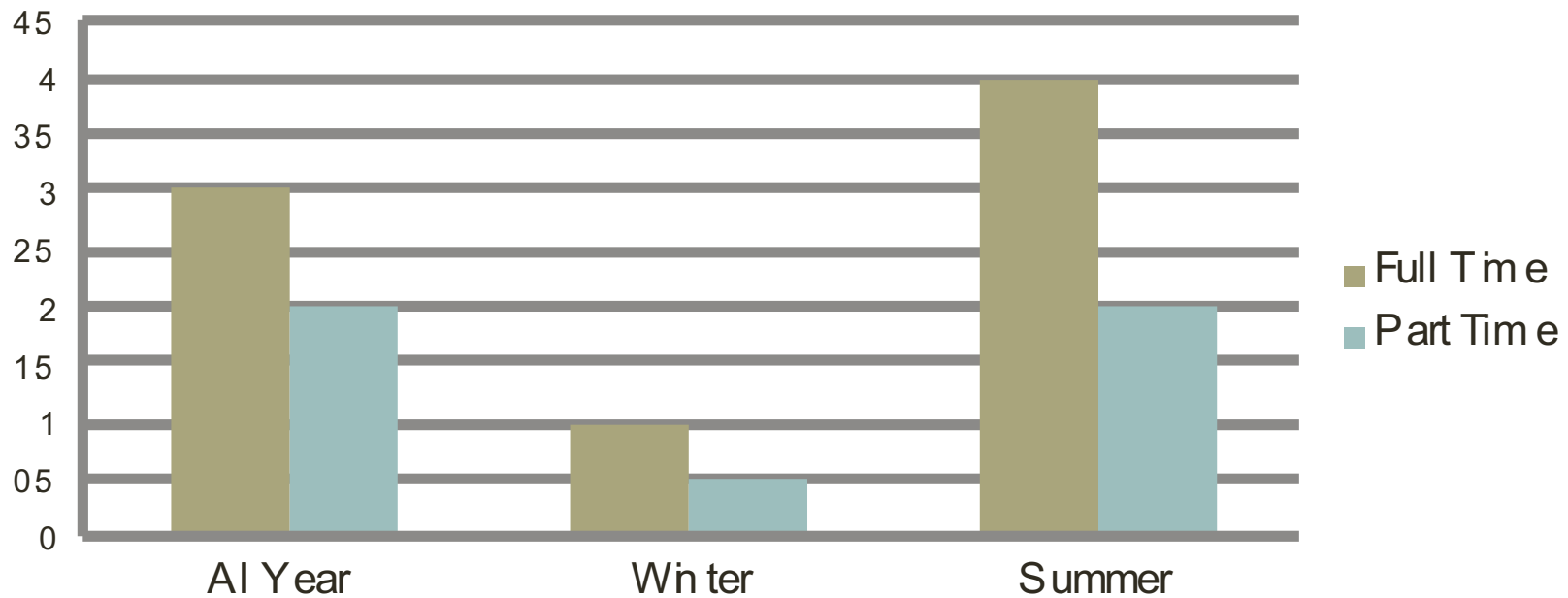
Answered: 87 Skipped: 0



How many people do you employ?

Answered: 87 Skipped: 0

Average # of Employees



**** 324 full-time and 216 part-time jobs in the 108 tourism businesses in the Drumheller area**

What are your average payroll costs biweekly?

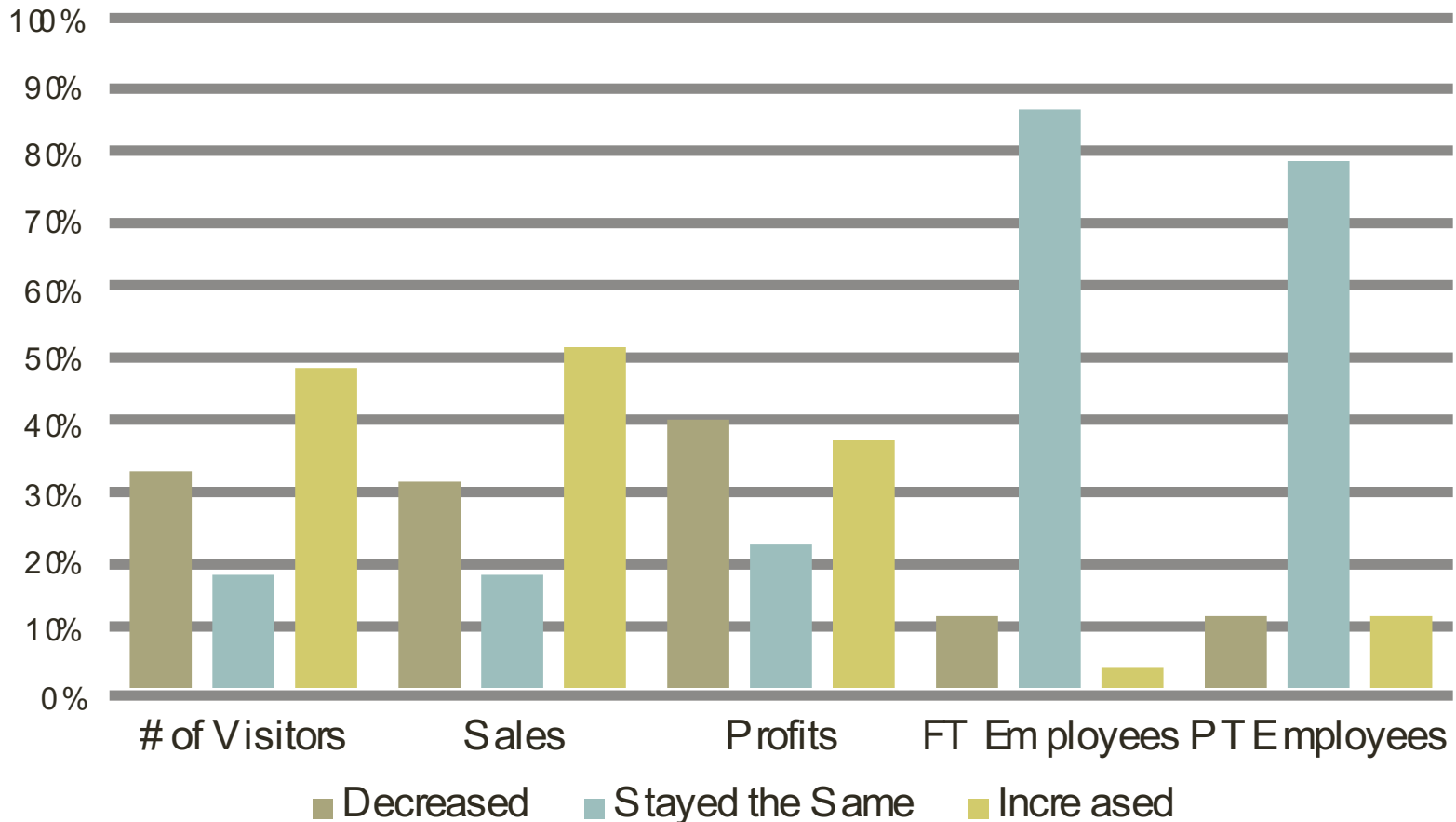
Answered: 61 Skipped: 26

	Average Biweekly Cost	# of Pay Periods	Average Seasonal Payroll Cost
Winter Season January-April October-December	\$ 7,758	15 pay periods	\$ 116,370
Summer Season May-September	\$ 11,497	11 pay periods	\$ 126,467

How was business in 2017 compared to previous years?

Answered: 87 Skipped: 0

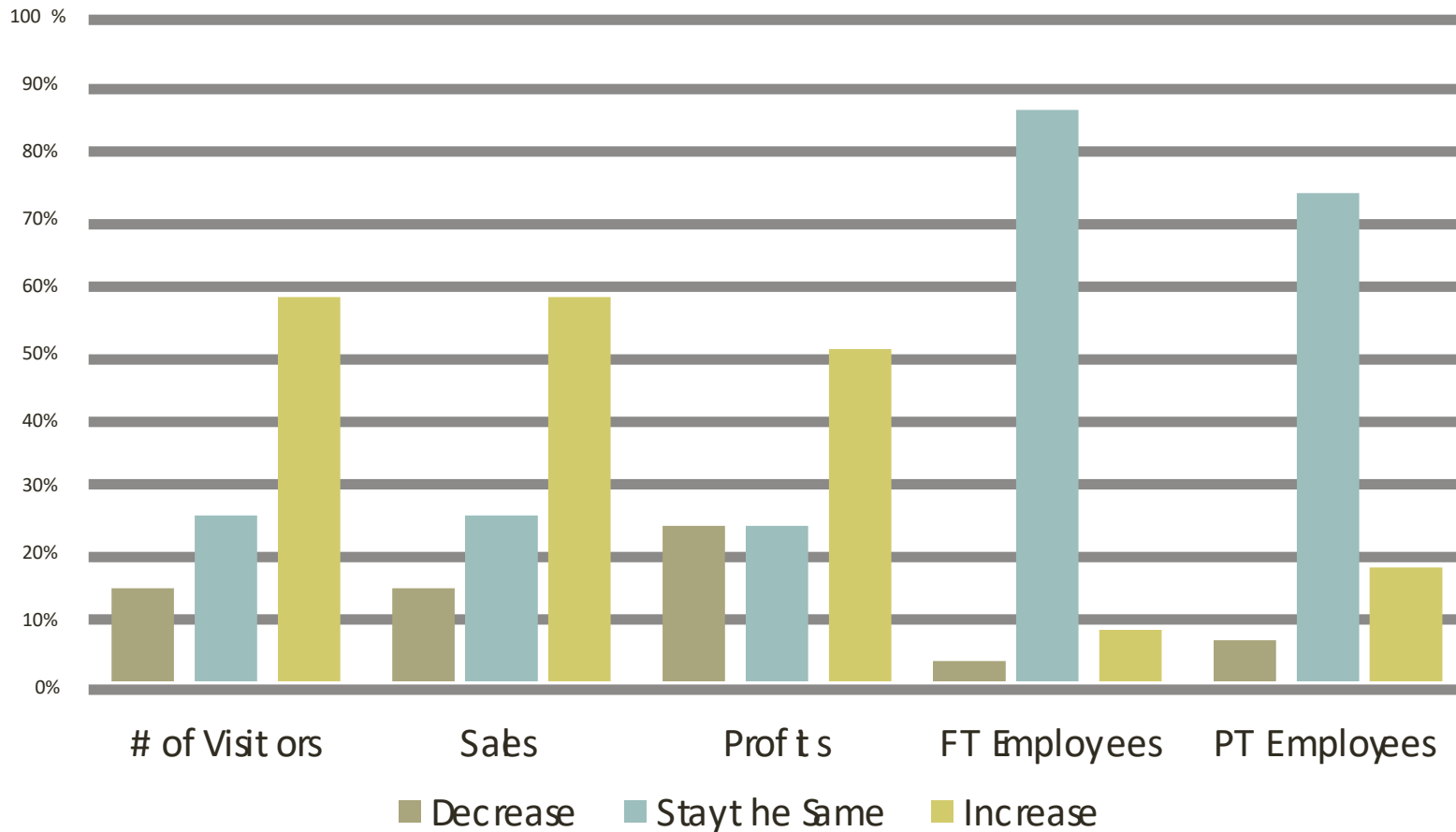
Business Performance in 2017



What do you expect in 2018?

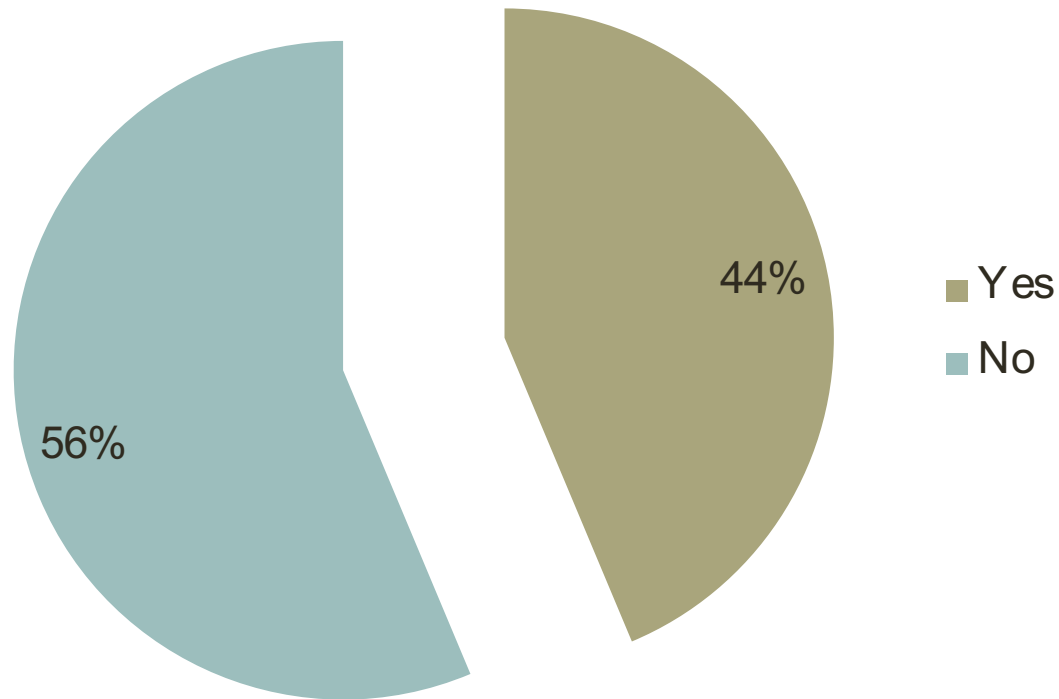
Answered: 87 Skipped: 0

Expected Business Performance in 2018



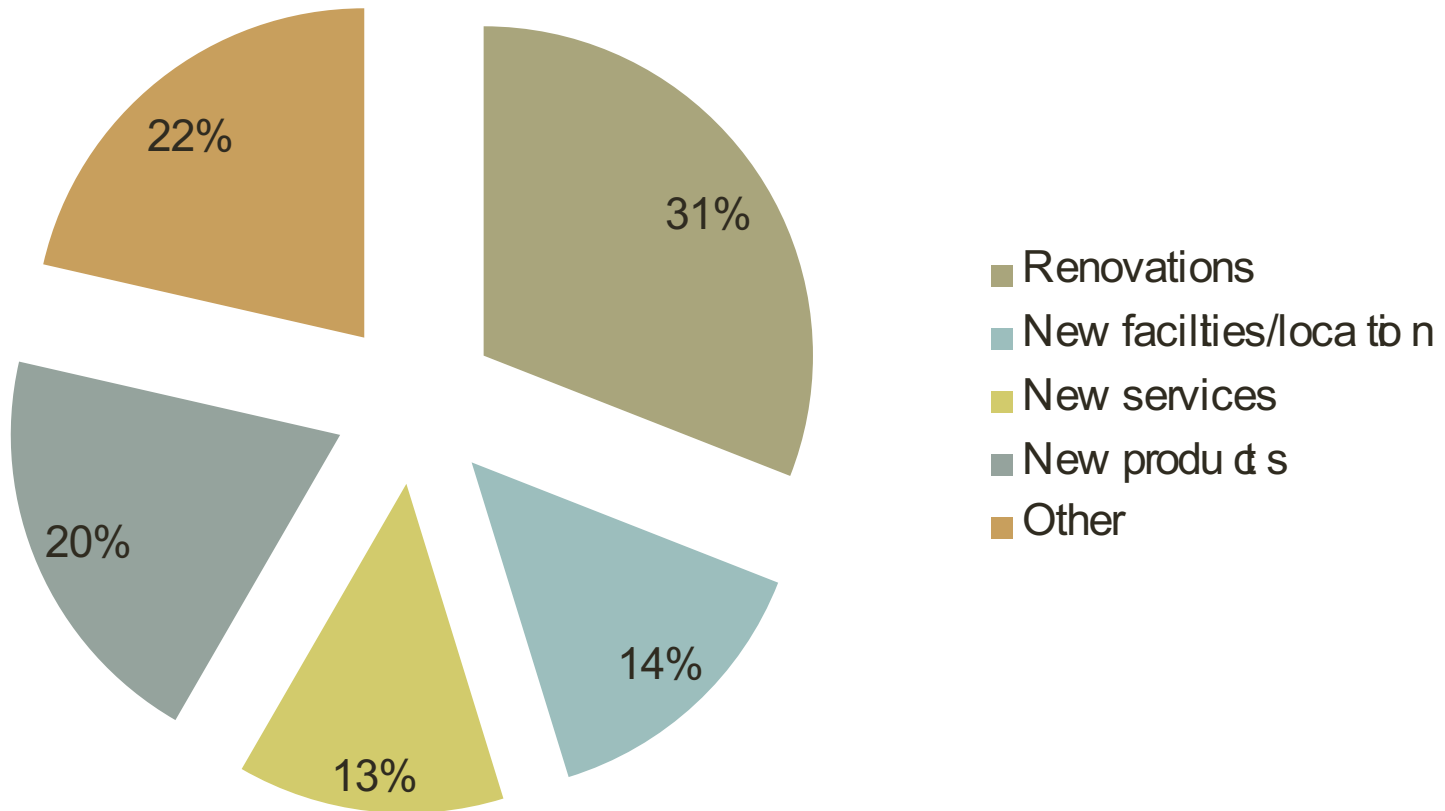
Considering expanding in 2018 or 2019?

Answered: 87 Skipped: 0



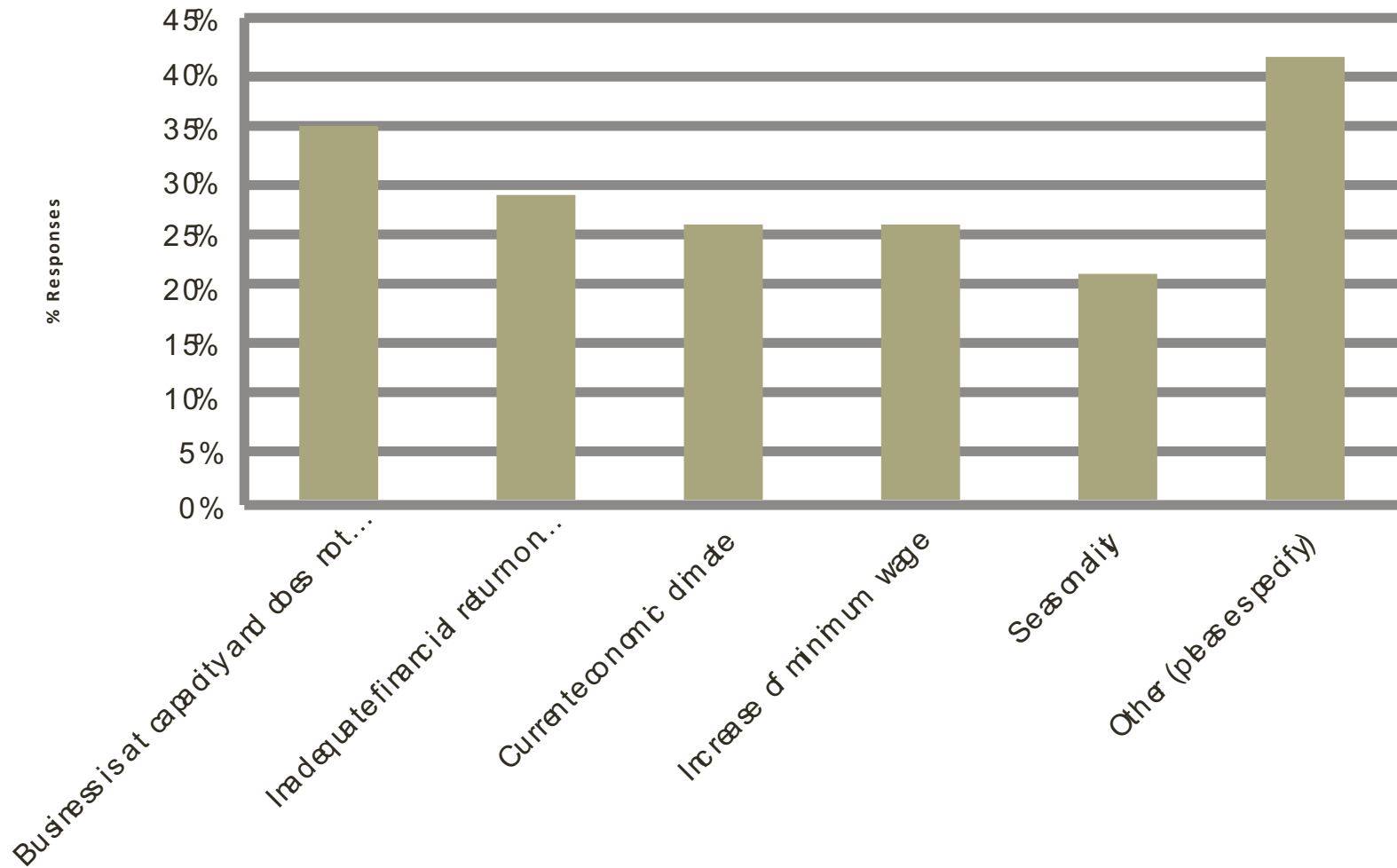
What kind of expansion?

Answered: 39 Skipped: 48



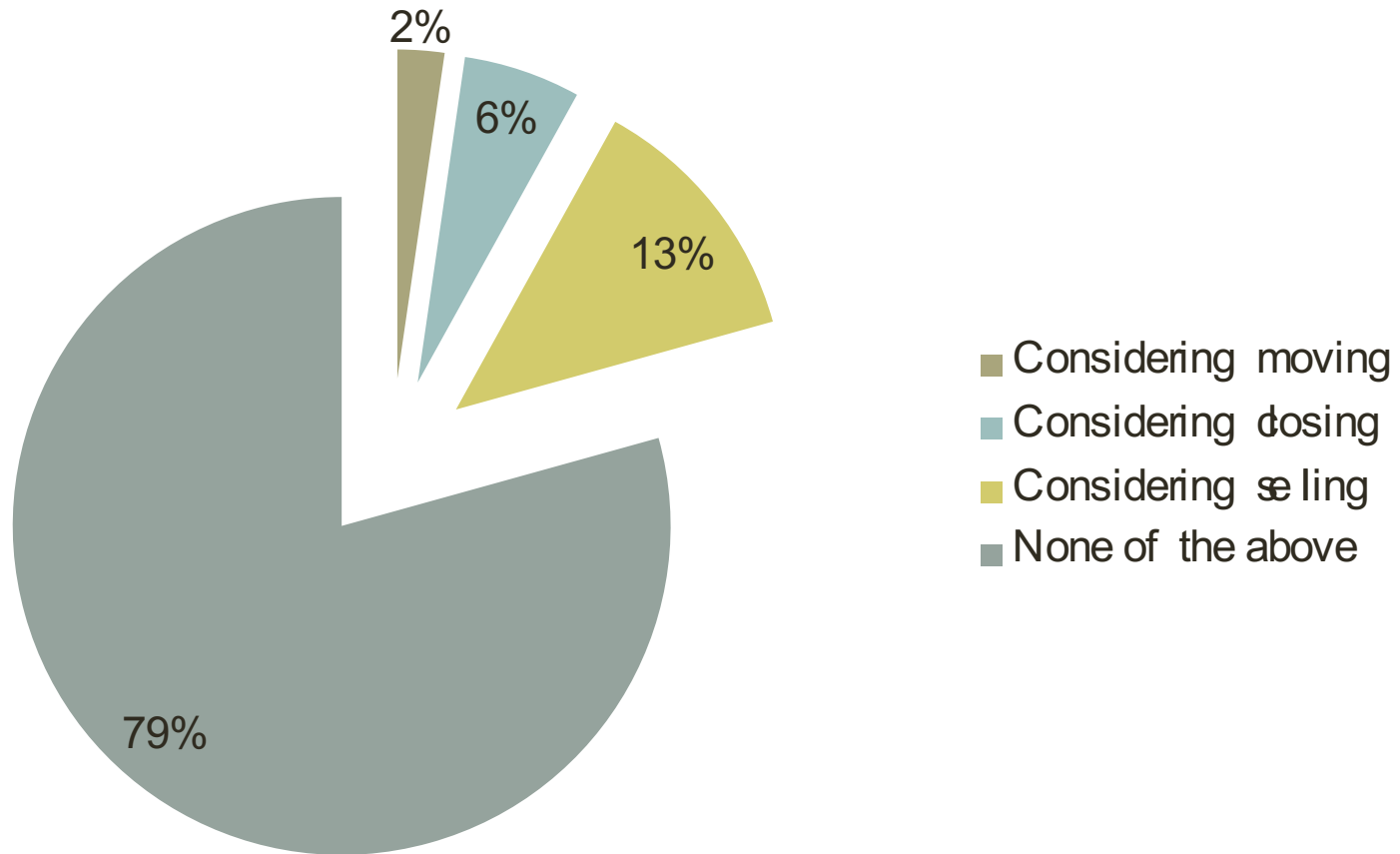
Reasons for NOT expanding

Answered: 46 Skipped: 41



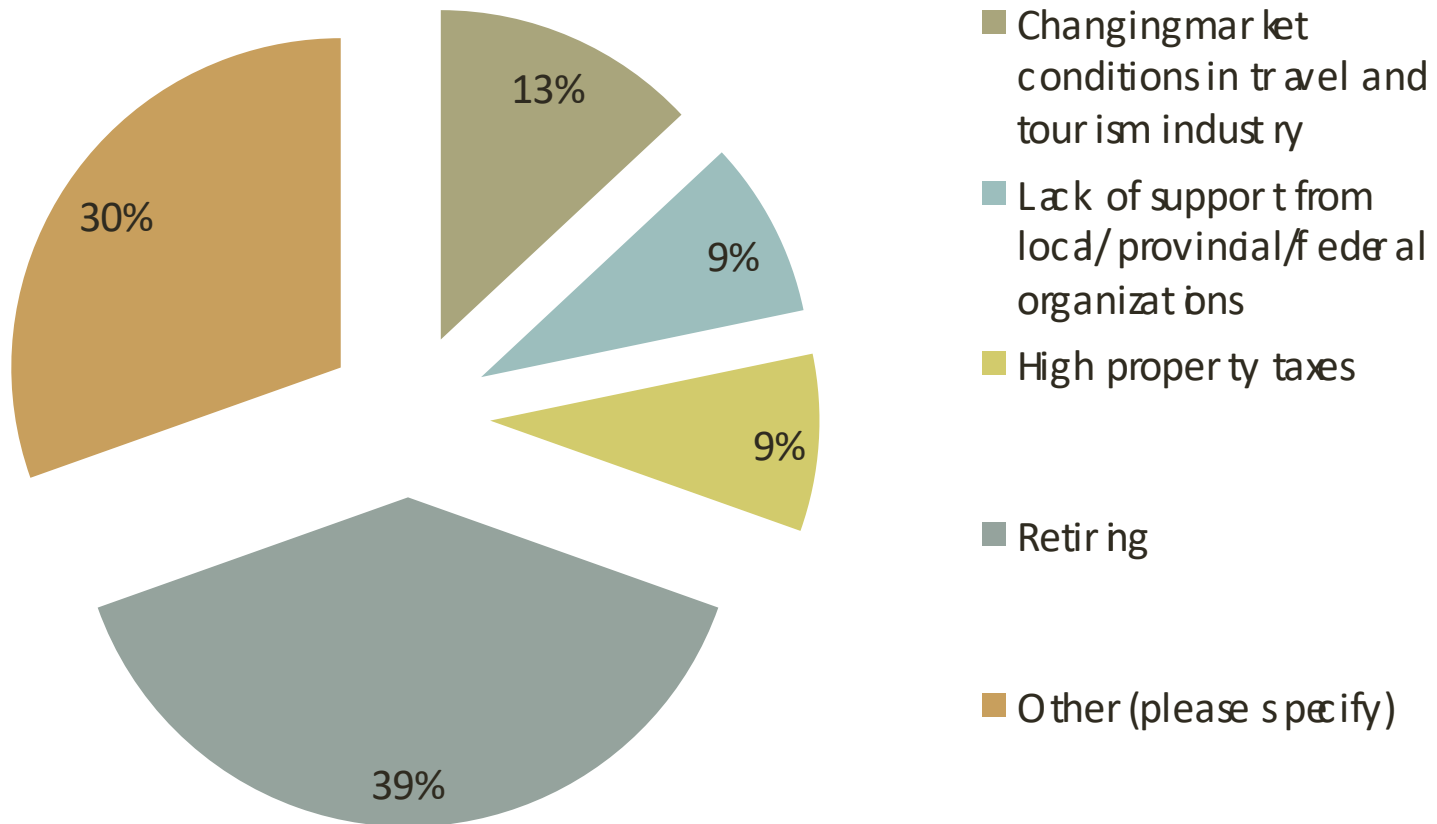
Considering moving, closing or selling in 2018-19?

Answered: 87 Skipped: 0



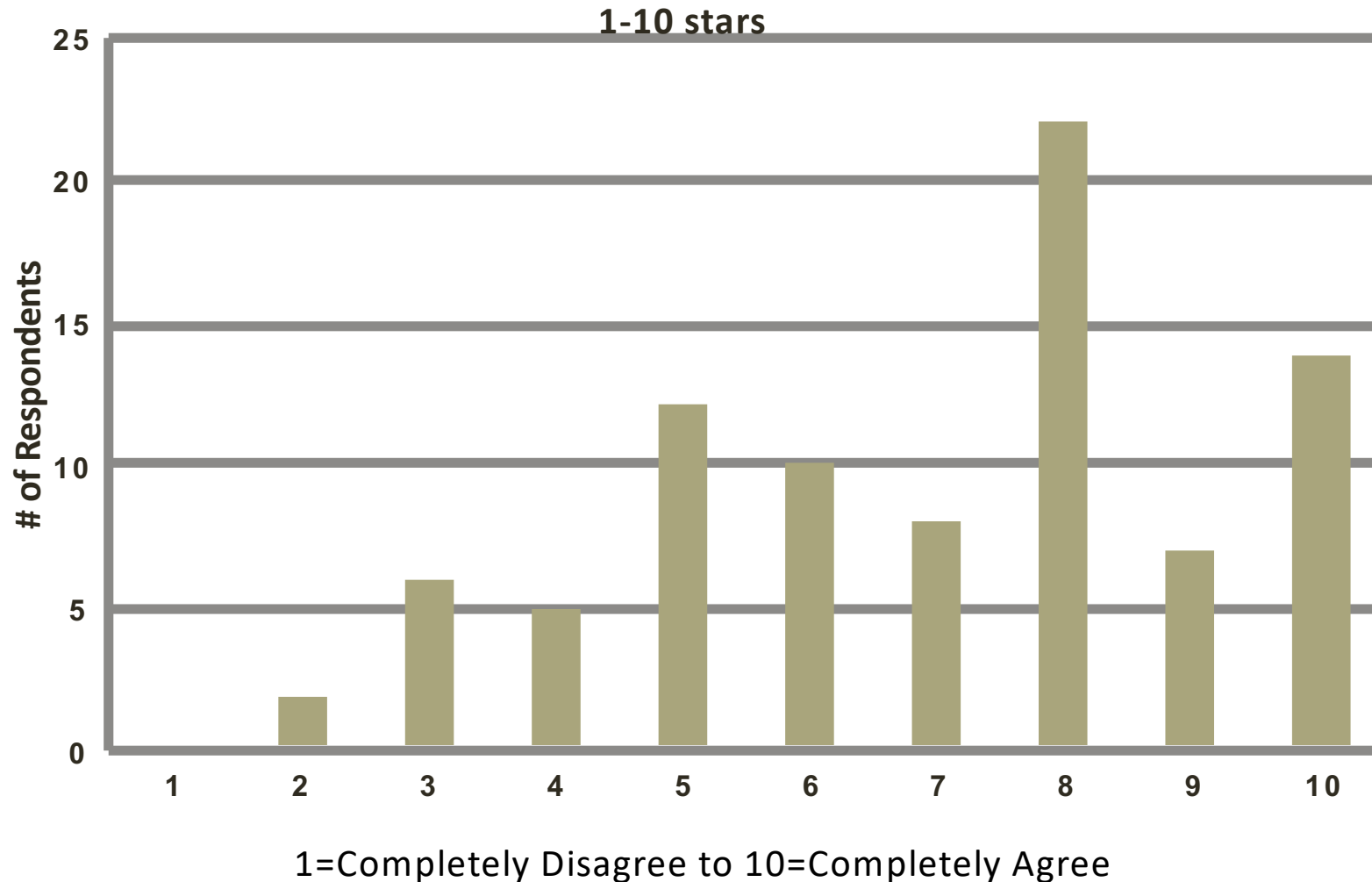
Reasons for moving, selling or closing

Answered: 16 Skipped: 71



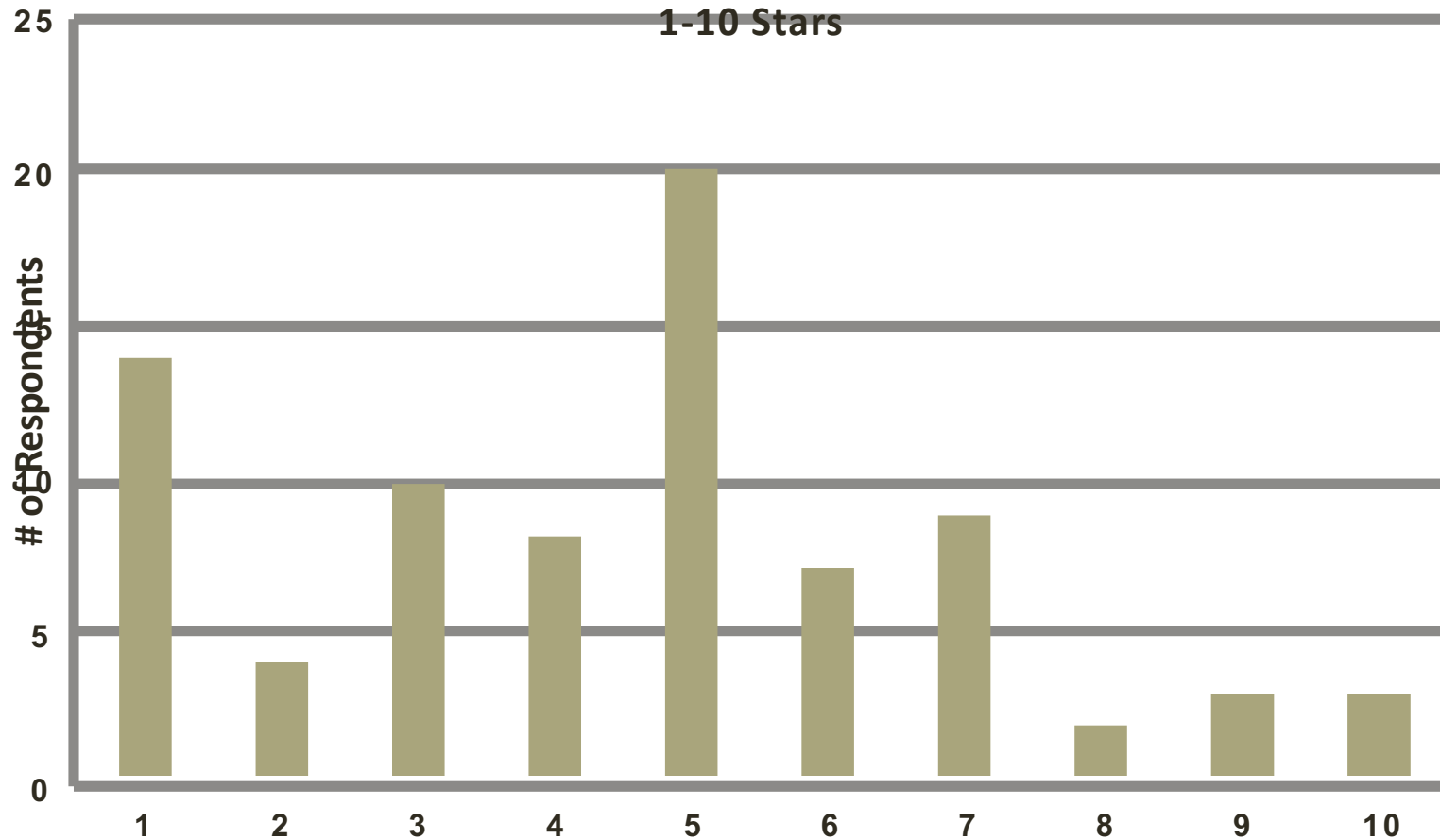
Drumheller, as a community, supports tourism businesses

Answered: 86 Skipped: 1



It is easy to find, recruit and retain good quality staff in Drumheller

Answered: 80 Skipped: 7

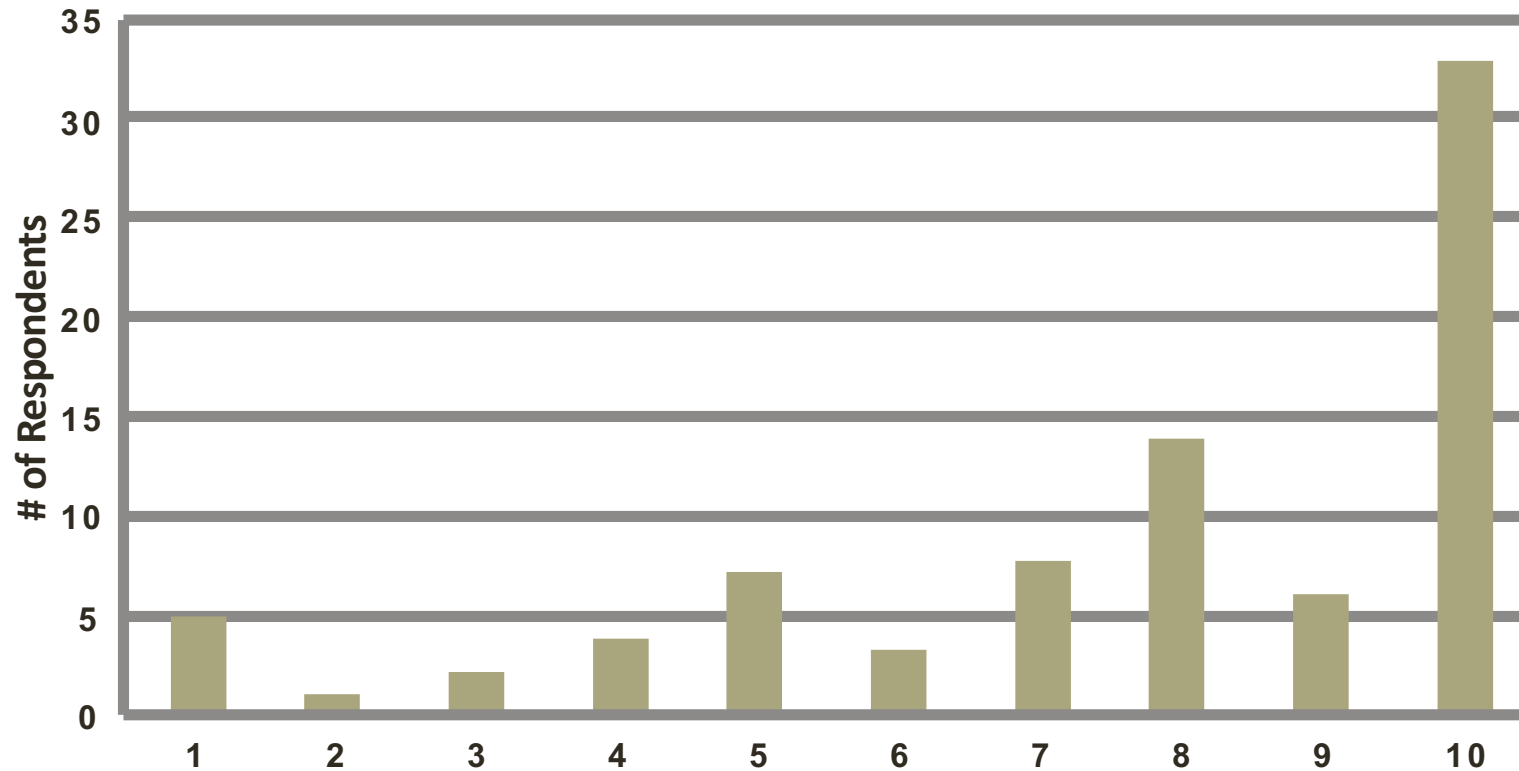


1=Completely Disagree to 10=Completely Agree

I would like to work with the Town of Drumheller and Travel Drumheller to work on promotional pieces for Drumheller

Answered: 83 Skipped: 4

1-10 Stars



1=Completely Disagree to 10=Completely Agree

Questions?

Next Steps

- Complete full report and presentation for Drumheller Town Council – Date TBD
- Development of external/business report for Drumheller Business Community
- Meet with the TIBRE project group and community leaders to discuss learnings from the project and go forward strategy.