



CO-CREATING A DESTINATION DEVELOPMENT

PLAN FOR DRUMHELLER AND AREA

Destination Development Plan

Twenty31 Consulting Inc.

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twenty•31
tourism by design

Introduction and Executive Summary

The Drumheller Valley has a lot to be proud of as a tourism destination. This community of 8,000 people is blessed with many unique, sought-after tourism experiences - from a world-renowned museum and research station for the study of paleontology, to a geography and geology not found anywhere else on Earth and world-class arts and culture products and experiences - the Drumheller Valley welcomes hundreds of thousands of visitors each year. And, **Drumheller may be only at the tip of achieving its full tourism potential.**

Drumheller has bigger goals for tourism. Now one of its primary industries, the Drumheller Valley is asking what more it can do to achieve its vision of becoming Alberta's tourism alternative to the Rockies, Calgary, and Edmonton. To achieve this, a comprehensive **all-of-community and all-of-government approach** to tourism development and tourism investment, supported by a stronger tourism enabling environment will be required to cohesively create the formula to achieve success.

With the community's natural, built, and cultural assets, the **future potential for tourism in Drumheller is only constrained by perceptions of what tourism currently is, and supported by the vision of what it can become.** A mindset shift that can reposition Drumheller with government partners at all levels, residents, tourism industry stakeholders, and travellers, from one viewed as largely about summer, targeting Southern Alberta families visiting for a unique Dinosaur experience, to a place that expands on that foundation to grow tourism.

This includes developing a destination that fully embraces **year-round visitation**, leveraging tourism experiences and assets that **strengthen the dinosaur foundation, and moves beyond to support enhanced community vibrancy, live theater and events, sports tourism, soft adventure, wellness, and food and drink - all of which are of significant interest to prospective visitors from across Canada, the US, and around the world, and over all seasons.**

That will mean that Drumheller must further invest resources to address short-term and systemic challenges impeding its tourism growth potential and actively seek opportunities to sustainably grow the economic, social and environmental benefits of tourism. It will also need to enhance its **leadership position to confidently socialize this Plan to residents, local business and government** to align on this vision and importantly attract the financial resources and investment required to realize it.

Drumheller's Destination Development Plan will outline the blueprint required to achieve this vision.

Acknowledgements

Tourism is a collaborative effort – it is highly dependent on the industry that it supports, from a wide array of stakeholders directly and indirectly engaged in developing and supporting the conditions for tourism to thrive. The Travel Drumheller Destination Development Plan was developed with extensive consultation from a wide variety of tourism stakeholders from across the Drumheller region.

We are thankful for their support, participation, and ideas to help grow tourism, protect the industry from disruptive forces, and consider new ways for Drumheller’s tourism industry to adapt to a new tourism future.

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- Vance Neudorf, Badlands Amphitheatre
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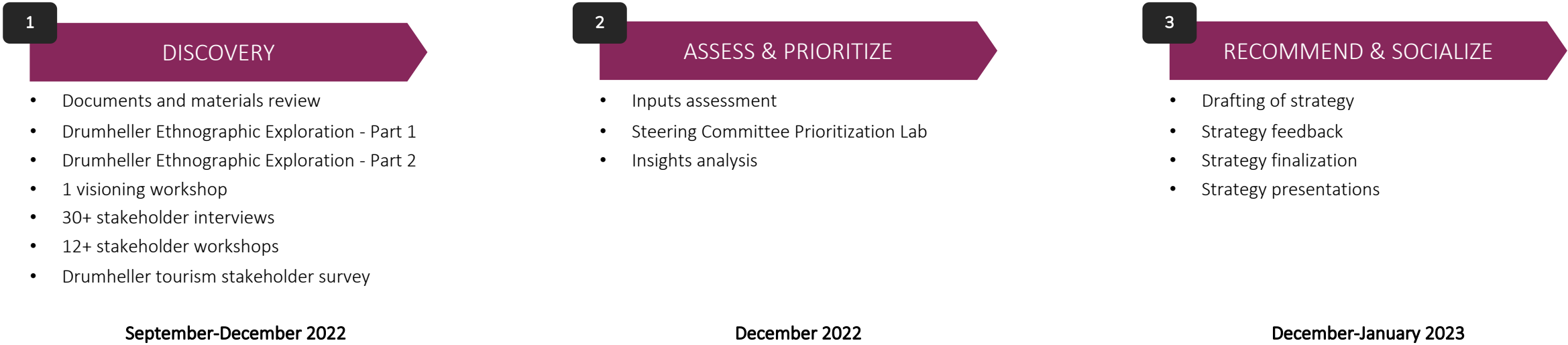
Methodology

It is critical that Drumheller’s Destination Development Plan (the Plan) be rooted in evidence and that this evidence comes from, and is verified by, multiple sources of information. This is necessary to ensure a holistic understanding of the current tourism context and to gain buy-in from individuals that have a stake in the outcome of the Plan.

The Discovery phase included review of existing strategies, plans, research, and more, as well as key tourism stakeholder engagement. A situational analysis was completed using that essential research and review process (see **Appendix A** for a Definition of the Drumheller region, **Appendix B** for key situational analysis insights, and **Appendix C** for topline survey results).

Assess & Prioritize consisted of assessing data and insights collected during Discovery and prioritizing top initiatives identified based on potential impact they have in achieving strategic goals and objectives, and their ease of implementation (see Initiative Prioritization Assessment and Initiative Prioritization Assessment Results in **Appendix D**). During this phase, the team further uncovered, prioritized, and defined key potential destination development opportunities for investment (see **Appendix E**).

Finally, in the Action phase, the strategy took shape and included input of the Drumheller Destination Development Plan Steering Committee as well as Travel Drumheller’s leadership.



How to Read This Document: A Destination Development Plan Framework

Tourism strategies typically rely on historical data, research, and insights to identify challenges and opportunities – those that require management, and those that require acceleration.

The framework used to structure Drumheller’s Destination Development Plan allows for the flexibility needed to navigate a post-pandemic tourism environment. It is rooted in evidence, informed by a detailed understanding of the tourism context, thorough engagement including myriad interviews and workshops with Drumheller’s tourism leaders and tourism stakeholders throughout the community, in order to structure a path forward.

The outlined Plan begins by first laying out tourism values, through guiding principles, that Drumheller wants to ensure remain constant as it executes its strategic plan moving forward.

It is followed by an understanding of key short, medium, and long-term challenges as well as opportunity themes, before setting the vision – along with the strategic goals and objectives necessary to achieve that vision.

With the vision, strategic goals, and objectives set, details of the Plan begin to emerge with a breakdown of initiatives by pillar, along with key tactical actions, timelines, responsible stakeholders, and measures for each to ensure the successful implementation – over the months and years to come.

GUIDING PRINCIPLES	Values that guide tourism stakeholders to accomplish its vision
CHALLENGES & OPPORTUNITIES	Short and long-term bottlenecks and barriers that need to be addressed, as well as potential prospects to consider
VISION & MISSION	Direction for tourism in Drumheller that reflects tourism stakeholder needs, potential visitors, and communities that are served
GOALS & OBJECTIVES	Broad and longer-term outcomes and shorter term, measurable ones
PILLARS & INITIATIVES	Initiatives organized in pillars that: <ul style="list-style-type: none"> • Can be supply-driven to leverage a competitive opportunity • Can be demand-driven such as an under-targeted group of visitors • Are prioritized based on impact and ease of implementation
TACTICAL PLAN	Includes actions and timelines that: <ul style="list-style-type: none"> • Support implementation of objectives and initiatives • Ensure conditions for success are met and that there are sufficient resources to develop opportunities • Oversee tourism enabling environment and infrastructure support for product and experience development/enhancement • Includes approach for targeting key markets of those who might be willing to travel to Drumheller

Guiding Principles

Guiding principles represent the shared values and beliefs of a Destination's tourism industry. For Drumheller, these guide the sometimes difficult decisions that need to be taken, and apply in all circumstances, regardless of changes in goals, strategies, type of work, or management.



1. We will work with the community to ensure that tourism and community goals are fully aligned and that there is mutual benefit derived from our actions.
2. We unite the entire tourism industry and its supporters through open communication, collaboration, and partnerships.
3. We welcome all visitors warmly, ensuring they leave feeling like they were our guest and not merely a customer.
4. We commit to providing authentic experiences that communicate our unique rural history and that celebrates the people that call this place home.
5. We encourage an entrepreneurial environment that fosters creativity, bold action, and innovation.
6. We strive to protect our one-of-a-kind natural and agricultural environment to ensure its enjoyment by current and future generations of residents and guests.

Challenges

Discovery conducted to inform Drumheller's Destination Development Plan, delved deeply into understanding systemic challenges impacting tourism in the region. The source of this information was derived directly from tourism leaders across the Drumheller region, as well as many other public and private sector tourism stakeholders, and from observation and experiences from the consulting team over two visits.

While the list below does not represent all tourism challenges that Drumheller faces, it outlines the most critical ones.

Challenges are divided into two broad categories:

1. Those that have an immediate impact on tourism in the short-term; and
2. Longer-term, systemic challenges facing tourism in Drumheller.



Challenges (continued)

1. Challenges that have an immediate impact on tourism growth in the short-term

Challenge	Description	Potential Impact	Management /Actions
1. Enabling environment	<ul style="list-style-type: none"> Insufficient resources allocated to the Drumheller tourism enabling environment (DMO)—both human resources and financial resources to support the organization relative to the important role that tourism plays in the community It is recognized that there are limited resources in this small community with a limited tax base As a result, tourism in Drumheller may not receive the attention or priority that this tourism dependent community should 	<ul style="list-style-type: none"> Community and local government is perceived to not value tourism in Drumheller Drumheller lacks the resources to truly achieve its full potential Inability to meaningfully grow what may be an important industry with long reach into other industries for Drumheller 	<ul style="list-style-type: none"> Establish tourism as a leading industry that supports economic growth in Drumheller with well-crafted plans Communicate plans and their availability to key stakeholders Focus on attracting investment through practical investment attraction strategy to support tourism initiatives Explore opportunities and mechanisms with partners such as the Royal Tyrrell Museum or through Alberta Museums Association to increase ticket pricing to support tourism Consider other sources of potential funding to support the enabling environment including Travel Alberta, Prairies Can, the Alberta government or additional destination management fees
2. Challenges with seasonality & diversity/ quantity of accommodations	<ul style="list-style-type: none"> Challenges with seasonality of visitation and lack of diverse market segments (limited MICE travel) creates imbalance in accommodation offer (high occupancy in summer and low occupancy in winter) Lack of diverse accommodation options (e.g., luxury, alternative, (yurts, glamping) and business hotels 	<ul style="list-style-type: none"> Hinders ability to optimize demand during higher summer season; attract higher-yield visitors (business travellers, international visitors) and independent travellers year-round with lure of alternate and higher-end accommodations, limiting potential for annual tourism revenue growth 	<ul style="list-style-type: none"> Develop tourism products and experiences to attract year-round visitation to support more accommodation stock Address potential challenges associated with development of additional accommodation options such as labour and labour housing, in coordination with Drumheller's housing strategy Create accommodation investment attraction plan by laying out the business case for enhanced accommodations options Seek investors through road shows and investor awareness to identify opportunities for investment in accommodations of all types Encourage partnership between attractions and accommodations to develop unique stays and experiences

Challenges (continued)

2. Longer-term, systemic challenges impacting tourism in Drumheller

Challenge	Description	Potential Impact	Management /Actions
1. Negative resident sentiment towards tourism	<ul style="list-style-type: none"> Perception by some residents that tourism competes for public resources Challenge in demonstrating benefits of tourism to residents Perception that tourism is not a priority industry that supports local economy Behaviour of some visitors causing friction with locals 	<ul style="list-style-type: none"> Lack of community buy-in hampers ability to leverage tourism as a powerful economic driver Tourism operates in a silo, limiting potential community involvement and benefits, causing further community negative sentiment towards tourism, and decreasing visitor experience quality 	<ul style="list-style-type: none"> Support concerted and consistent effort to engage community in meaningful dialogue that results in tangible outcomes that residents can see direct benefit in Conduct resident sentiment research on perception of tourism to gain a better understanding of challenges and opportunities to communicate tourism's value Communicate how tourism supports residents and their leaders through economic and social benefits of tourism Consider developing a resident ambassador program
2. Leadership & industry mindset shift towards year-round tourism	<ul style="list-style-type: none"> Many tourism businesses and community members continue to think of tourism as a seasonal industry focused on summer Perception of insufficient tourism products and experiences to support shoulder/winter season tourism Busy summer season causes fatigue and need for tourism businesses to take a break in the shoulder/winter seasons 	<ul style="list-style-type: none"> Industry is not yet fully aligned on Drumheller's offer as a year-round destination, potentially causing lack of, and disjointed products and experiences Fewer visitors aware of winter/shoulder season offerings in Drumheller with visitors choosing other destinations, reducing total annual tourism revenues potential 	<ul style="list-style-type: none"> Communicate Drumheller's prioritization of year-round tourism and highlight successes of existing fall, winter, and spring tourism businesses to entice others to gradually lengthen their seasons Work with potential entrepreneurs and investors to develop more shoulder/winter tourism products and experiences to entice more visitors
3. Under-utilized year-round tourism assets	<ul style="list-style-type: none"> Many of Drumheller's strongest tourism assets are under-utilized relative to their potential, and could be optimized to support tourism (often through additional resources) Perceived lack of tourism-related offerings to draw visitors to region in shoulder and winter seasons Lack of unity and attractions, activities, and entertainment that supports region's main draws (e.g., dinosaurs, outdoor activities, theater, etc.) 	<ul style="list-style-type: none"> Real or perceived, lack of shoulder/winter tourism products and experiences deters visitors from coming to Drumheller – thus reducing potential annual tourism revenues Lack of year-round visitation reduces business case for new operators who may wish to offer new tourism experiences and/or accommodations 	<ul style="list-style-type: none"> Create inventory of underutilized assets that could be extended to support shoulder/winter tourism products and experiences and assess (from market research) Work with local tourism businesses, entrepreneurs, and investors to determine how to fill gaps through creation of shoulder/winter products and experiences and investment Prioritize under-utilized assets across Drumheller based on potential for greater returns Work with partners to advocate for, and implement under-utilized tourism asset projects

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Challenges (continued)

2. Longer-term, systemic challenges facing tourism in Drumheller

Challenge	Description	Potential Impact	Management /Actions
4. Lack of labour availability; lack of qualified labour	<ul style="list-style-type: none"> Insufficiently trained labour across almost all sectors leading to limited direct and indirect tourism staff to support tourism businesses and organizations Shortage of accommodation to support labour attraction 	<ul style="list-style-type: none"> Continued impact on potential of immediate year-round tourism revenues by limiting ability for tourism businesses to remain open when student labour goes back to school in the fall Cycle of training resources for one summer then retraining new resources for the following summer is costly Potential to impact quality of tourism experience due to creation of negative visitor sentiment caused by lack of service, exacerbating a cycle of negative repercussions 	<ul style="list-style-type: none"> Engage broad-Drumheller tourism labour committee to assess and address actual and future tourism labour needs and develop solutions to overcome identified challenges Examples to overcome labour challenges could include working with educational institutions for youth employment, seniors and newcomers to encourage training and support, more affordable housing options (AB has a competitive advantage in portable accommodation for energy sector that may be leveraged for tourism)
5. Limited public transportation	<ul style="list-style-type: none"> Limited public transportation options to get to Drumheller(from Calgary Airport and the Rockies) and within, and around the region 	<ul style="list-style-type: none"> Challenge to access regional and international markets due to transportation barriers, depriving tourism in Drumheller from some higher-yield markets where revenues could more easily be optimized Contributes to staffing shortages as staff cannot access reliable public transit Visitors who arrive without a personal vehicle are limited to what they can experience in the region 	<ul style="list-style-type: none"> Develop tourism transportation task force to seek solutions to public transportation issues Work with local operators, entrepreneurs, and public sector to co-fund basic public transportation (e.g., regular bus from Calgary and/or Edmonton paired with an in-destination shuttle) Work with Alberta government to establish more reliable coach service to Drumheller and across rural Alberta
6. Established brand perception of Drumheller	<ul style="list-style-type: none"> Perception that tourism in Drumheller is only focused on dinosaurs and family entertainment Despite AB residents being a large potential target market, many regional visitors visit the Tyrrell museum during a school field trip and don't return until they have children of their own Perception of limited culinary offerings as well as adult-orientated activities and accommodation options 	<ul style="list-style-type: none"> Visitors may choose other destinations that may be more aligned with their values and expectations; desire of things to do, resulting in a loss of potential annual tourism revenues 	<ul style="list-style-type: none"> Gain better understanding of visitor brand perceptions to address pre-conceived notions of Drumheller Work with tourism stakeholders to define Drumheller brand based on market research, complementing existing brand perceptions (i.e., dinosaurs) Run marketing and communications campaigns in key markets, based on updated focus Create training program to share marketing approach and materials with tourism stakeholders

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Challenges (continued)

2. Longer-term, systemic challenges facing tourism in Drumheller

Challenge	Description	Potential Impact	Management /Actions
7. Negative environmental impacts of tourism	<ul style="list-style-type: none">Contributing to negative resident sentiment is the perception of the detrimental impacts of tourism to the natural environment within this unique and fragile eco-systemOpportunity to incorporate sustainability measures across tourism initiatives and programs Drumheller might offer	<ul style="list-style-type: none">Increased environmental degradation resulting in a diminished product offering, compromised visitor experience, negative resident sentiment, ultimately reducing long-term visitation, annual tourism revenues, and sustainability	<ul style="list-style-type: none">Conduct audit of programs such as product and destination development, marketing, and communications to determine how to incorporate sustainable tourism and inclusivity measuresCommunicate sustainability approach to residents and visitors, including immediate effort to increase visitor education and enforcement of positive behaviours

Opportunities

Stakeholder engagements and a review of key tourism trends revealed opportunities that Drumheller can leverage to achieve possible potential outcomes over the next months and years.

While the list below does not represent all tourism opportunities that are available to Drumheller, it outlines opportunity themes that may be most critical to its future.

Opportunity themes can be grouped in two categories:

1. Immediate and short-term opportunity themes; and,
2. Medium and long-term opportunity themes.



Opportunities

1. Immediate and short-term opportunity themes

Opportunity	Description	Potential Impact	Management /Actions
1. Tourism leadership & advocacy	<ul style="list-style-type: none"> While Drumheller has focused primarily on marketing to prospective visitors, there is opportunity to transition Drumheller to support destination management activities as well, to meet defined vision, goals, and objectives 	<ul style="list-style-type: none"> Beyond continuing to market the destination (something that Drumheller already does well), focusing on “destination management” enables it to think more broadly to support development of the type of destination that community members and target markets alike, desire 	<ul style="list-style-type: none"> Re-focus Travel Drumheller activities to support destination management in addition to marketing Communicate updated vision and supporting Destination Development Plan to key tourism stakeholders so they understand the new direction and support they can expect to receive
2. Tourism culture for Drumheller communities	<ul style="list-style-type: none"> Focus on communicating tourism as net benefit to the community – supporting local economy, as well as social and environmental priorities Focus on establishing tourism culture that is progressive and cognizant of all challenges and opportunities among community leaders and residents 	<ul style="list-style-type: none"> Shifts community and public-private-sector mindset to one that prioritizes tourism as a long-term and sustainable economic force Linking tourism interplay of economic and social priorities to work together to achieve societal objectives to draw greater support for tourism from community and local government 	<ul style="list-style-type: none"> Create communication campaigns to residents to describe tourism plans, benefits, and the role that all residents play as part of the tourism ecosystem
3. Packaging & itinerary development	<ul style="list-style-type: none"> Creating packages and itineraries of things to do in Drumheller for different target markets makes it easier and more enticing for visitors to choose Drumheller (and more often), stay longer, and spend more 	<ul style="list-style-type: none"> More visitors come to Drumheller because they are easily able to find and/or create experiences they are seeking (backed by research and evidence) Generation of tourism wealth for Drumheller communities and tourism stakeholders 	<ul style="list-style-type: none"> Create inventory of tourism products and experiences across Drumheller and the region Consider identifying and developing packages, itineraries, and uniquely-Drumheller experiences Leverage technology to facilitate how travellers choose and book visit
4. Nimble, highly targeted (digital) marketing campaigns to drive market	<ul style="list-style-type: none"> Despite potential for optimization of under-utilized assets, Drumheller already has much to offer and is in reasonable driving distance from a major urban market (i.e., Calgary) Focus on experiences Drumheller offers to attract existing and different segments from major urban markets through highly targeted digital campaigns 	<ul style="list-style-type: none"> Development of marketing campaigns to reach high-volume of potential higher-yield travellers Generation of tourism wealth for communities and tourism stakeholders 	<ul style="list-style-type: none"> Continue to develop marketing campaigns in coordination with Travel Alberta and other partners, to create interest and immediate travel decisions, along with diverse and inclusive marketing assets (e.g., images, videos, etc.) Ensure marketing plans remain nimble to anticipate tourism limitations caused by external factors such as new recessions, border restrictions, etc.

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Opportunities (continued)

1. Immediate and short-term opportunity themes

Opportunity	Description	Potential Impact	Management /Actions
5. Travel trade channels	<ul style="list-style-type: none">• Work with travel trade (domestic and international) to leverage packaging and communication channels to entice targeted groups of visitors to visit Drumheller	<ul style="list-style-type: none">• More visitors come to Drumheller because they are easily able to find and/or create experiences they are seeking (backed by research and evidence)• Generation of tourism wealth for Drumheller communities and tourism stakeholders	<ul style="list-style-type: none">• Identify potential travel trade events to participate in to highlight all that Drumheller has to offer• Create partner relationships and communicate list of Drumheller tourism offerings

Opportunities (continued)

2. Medium and long-term opportunity themes

Opportunity	Description	Potential Impact	Management /Actions
1. Optimize under-utilized assets for tourism	<ul style="list-style-type: none"> From the Badlands Amphitheater, to the Rails to Trails project, to the budding world-class theater scene, to the downtown area, the Tyrrell Museum and many more – Drumheller has many potential tourism assets that are under-utilized that can be innovatively and respectfully optimized to further support tourism. 	<ul style="list-style-type: none"> Many under-utilized assets could benefit from some refurbishment and activation to quickly enable their use as part of the tourism experience Potential for projects to require less time and money versus developing new assets – while also improving overall tourism experience Recognizing that these assets frequently lack the funds and not the vision to optimize their assets for tourism 	<ul style="list-style-type: none"> Prioritize under-utilized assets across Drumheller based on potential for greater returns Work with partners to advocate for, and implement under-utilized tourism asset projects Consider innovative programming of these assets to support winter and shoulder season tourism Seek additional funding/investment for these projects to support tourism from all potential sources
2. Build year-round tourism products that will drive visitation	<ul style="list-style-type: none"> With increasing emphasis on shoulder/winter tourism, there is a need to support development of additional shoulder/winter tourism products – specifically those focused on creating cohesive experiences for a variety of traveller segments 	<ul style="list-style-type: none"> More elevated tourism products and experiences focused on shoulder/winter leads to more spending Drumheller businesses, ultimately increasing annual tourism revenues More things for Drumheller residents to do in shoulder/winter tourism season Attraction/retention of labour through meaningful year-round employment 	<ul style="list-style-type: none"> Create inventory of shoulder/winter tourism products and experiences and assess based on market research and against visitor needs Work with local businesses, entrepreneurs, and investors to determine how to fill gaps through investment and creation of shoulder/winter products and experiences, based on market research (e.g., culinary, outdoor recreation, expansion of evening hours, festivals and events, and more)
3. Develop downtown tourism vibe	<ul style="list-style-type: none"> While there is an opportunity to spread tourism throughout the region, there is also a need to continue to improve the tourism vibe downtown including culinary establishments, beautification, signage, pedestrian zones, more festivals and events, community-focused programming, etc. 	<ul style="list-style-type: none"> Improvement of visitor and community experiences downtown leads to increased desire for people to experience Drumheller, ultimately staying longer, spending more, and adding to annual tourism revenues 	<ul style="list-style-type: none"> Study attributes that make downtown Drumheller unique, focusing on strengths and ways to build on them through a variety of programs and in coordination with Drumheller's Downtown Revitalization Plan Create tourism-focused plan for development of downtown vibe and communicate plan with key stakeholders to ensure collaboration and support

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Opportunities (continued)

2. Medium and long-term opportunity themes

Opportunity	Description	Potential Impact	Management /Actions
4. Convert theater and film for tourism and room nights	<ul style="list-style-type: none"> • Drumheller has a surprisingly world-class sustainable theater program that has the potential to generate strong visitation to the region (e.g., Rosebud, Badlands Amphitheater) • Furthermore, and complementary to the theater program, Drumheller has been the setting of many Hollywood blockbusters that can be leveraged to generate additional visitation 	<ul style="list-style-type: none"> • Supporting build-out of world-class theater program in the Drumheller region would enhance its reputations as an artistic destination, beyond current perceptions • Additional visitation caused by theater demand in unique more remote settings from nearby major urban centers, such as Calgary • Further global awareness and visitation generated by promoting Drumheller's role in major blockbuster films 	<ul style="list-style-type: none"> • Audit theater opportunity to understand potential for future investment and attraction • Work with local businesses, entrepreneurs, and investors to determine how to fill gaps through investment and creation of more theater-related infrastructure, products and experiences • Work with local entrepreneurs to set up immersive film location touring operation and create targeted online marketing campaigns aimed at fans as well as global travel trade to generate awareness and interest • In conjunction with provincial and local film commissions, continue to communicate high-quality, unique locations to film companies
5. Identify and support visitor/community amenities	<ul style="list-style-type: none"> ▪ There are several infrastructure initiatives that can be developed to support tourism sustainably – from public washrooms, electric vehicles charging stations, additional public parking areas, incentives to support more roofed accommodations, river access, and more 	<ul style="list-style-type: none"> ▪ More options and seamless experiences for visitors make it easier for them to visit, stay longer, come more often, and contribute to wealth generation ▪ More tourism infrastructure also supports community needs and their perceptions of the value of tourism, creating more momentum to grow tourism 	<ul style="list-style-type: none"> ▪ Identify list of infrastructure projects across the region, and create prioritization assessment to determine those most likely to have greatest returns ▪ Work with partners/investors to advocate for and implement infrastructure projects
6. Support tourism investment & entrepreneurship	<ul style="list-style-type: none"> • While there is no lack of opportunities for existing and new businesses, and in some cases, even the demand, Drumheller needs to generate more investment and entrepreneurship drive to support tourism business development • There has been a recent influx of people moving to the community from urban areas to set up tourism businesses, injecting a new sense of enthusiasm 	<ul style="list-style-type: none"> • Being investment- and entrepreneur-friendly will create attraction for people to create new tourism opportunities, and perhaps even attract people to move altogether to the region • More opportunities means more opportunities for experiences, improving visitor and community options, spend, and ultimately increase tourism revenues 	<ul style="list-style-type: none"> • Identify list of potential tourism projects across the region, and create prioritization assessment to determine those most likely to have greatest returns • Create and investment/entrepreneur attraction plan based on research findings • Communicate existence of plan and opportunities for existing residents, or perhaps even newcomers to start and/or invest in tourism businesses in the region • Work with Travel Alberta and other partners to leverage market readiness and investment attraction programs

Vision & Mission

The defined vision and mission for Destination Development in Drumheller provide an aspirational view of the future for tourism development in Drumheller that is meant to inspire tourism stakeholders, their employees, and partners while providing guidance on how to successfully achieve that vision.

It represents the hope for the kind of tourism development that Drumheller wishes to achieve, as it aims to accomplish its goals and objectives – a tourism future developed by design.

VISION

To develop the next most visited destination in Alberta – beyond Alberta’s two major cities and the Rockies.

MISSION

Driving significant economic and social value for Drumheller residents, businesses, and visitors through destination development.



Goals & Objectives

To achieve its vision, Drumheller needs to consider the entire tourism ecosystem. It needs to satisfy economic development objectives by first and foremost supporting tourism stakeholders to accelerate wealth, job growth, and investor attraction.

Tourism in Drumheller also understands that decisions made on behalf of the tourism industry also impact the communities in which tourism occurs, as well as its surrounding

physical environment.

Drumheller’s Destination Development Plan, has set goals, or achievable outcomes, that are generally broad and longer-term, supported by objectives that are shorter-term, and that define measurable actions to achieve overall goals.

1

GOAL: ECONOMIC

Increase total annual revenue & profitability from tourism

Supporting Objectives

- Optimize number of experiences that are market ready to attract more visitors and to increase length of stay
- Improve seasonality in winter and shoulder seasons to attract more and higher-yield visitors to optimize revenues
- Improve awareness, interest, and action to visit across a larger and more diverse target markets
- Further entice investors and entrepreneurs to invest in tourism assets and experiences in the region because of its high potential for return on investment (ROI) and low risk

2

GOAL: SOCIAL

Improve destination livability and appreciation of tourism among residents

Supporting Objectives

- Establish tourism leadership presence when planning for broader social initiatives
- Improve perception of tourism in community through continued community engagement and alignment
- Support improvement in resident quality of life

3

GOAL: ENVIRONMENTAL

Ensure natural assets are protected & sustained for locals and visitors to enjoy for generations to come

Supporting Objectives

- Build awareness with tourism stakeholders and visitors on responsibility to long-term sustainability

Pillars & Initiatives

Drumheller’s Destination Development Plan, is broken down into three main pillars: Destination Leadership, Destination Promotion, and Destination Development, in addition to an extra pillar focused on future initiatives to consider that support longer-term objectives.

Each pillar contains a number of initiatives that Drumheller should undertake over the next years and months to achieve its ambitions. Tactical actions, timelines, responsible stakeholders, and measurable outcomes for each initiative are outlined in the following sections.

1

DESTINATION LEADERSHIP

Establish destination leadership culture to strengthen capacity and resources to implement Plan and accelerate tourism growth

- A. Launch Destination Development Plan implementation committee

QW
- B. Establish and communicate tourism leadership role and strategy
- C. Conduct and share industry, market, and social tourism research

QW
- D. Support tourism innovation, entrepreneurship, and investment

QW
- E. Address labour issues through “build in Drumheller” solutions
- F. Strengthen tourism partnerships with public-sector assets (e.g., Alberta Parks)

2

DESTINATION DEVELOPMENT

Enhance Drumheller tourism products & experiences

- A. Create more multi-day itineraries and experiences, especially shoulder/winter

QW
- B. Consider development of existing/new tourism products and experiences
- C. Revitalize Town of Drumheller downtown core for tourism
- D. Enhance Drumheller creative industries experiences and infrastructure
- E. Optimize Drumheller region trail system to accommodate various traveller segments
- F. Identify and support enhancement of tourism/social infrastructure
- G. Support tourism stakeholder product and experience training
- H. Provide training and incentives to encourage more sustainable tourism

3

DESTINATION PROMOTION

Grow year-round tourism revenue

- A. Build a Drumheller tourism marketing collective that includes brand enhancement
- B. Launch “value of tourism” community campaigns

QW
- C. Update campaigns targeting Albertans

QW
- D. Update campaigns targeting US drive market
- E. Strengthen online distribution and sales support
- F. Support a visitor services program with focus on operators

4

LONGER-TERM DEVELOPMENTAL WINS

Focus on longer-term tourism prosperity development

- A. Develop and implement a sport tourism strategy, including support for development of new sporting facilities
- B. Develop and implement health and wellness tourism strategy
- C. Develop and implement culinary tourism strategy
- D. Advocate for town of Drumheller masterplan that includes tourism
- E. Address transportation challenges in and around Drumheller

QW: Quick Wins



PILLAR 1: DESTINATION LEADERSHIP

PILLAR 1: DESTINATION LEADERSHIP

Initiative A: Launch Destination Development Plan implementation committee

		QUICK WIN
Description/Rationale		Timeframe
<ul style="list-style-type: none"> Drumheller’s Destination Development Plan requires owners who are willing and able to be accountable and responsible for its implementation. Ideally, owners have an existing stake in the area’s tourism industry as well as the resources, influence, and energy to ensure proposed initiatives are implemented effectively. Initiative 1 focuses on creation of the Drumheller Destination Development Plan implementation committee, composed of individuals from within and throughout the Drumheller region (see Appendix A), who can guide the direction of destination development for Drumheller and who will take ultimate ownership of implementation oversight. The implementation committee is responsible for identifying a paid lead and possible team whose role it will be to lead implementation of the Plan. Drumheller’s Destination Development Plan implementation committee will meet regularly to provide strategic direction and recommendations to Travel Drumheller, the destination development team, and other responsible Drumheller Destination Development Plan stakeholders on important tourism matters, to be defined as part of the committee’s terms of reference. A key initial action of the Drumheller Destination Development Plan implementation committee is to define terms of reference, key roles, terms, key tasks, and processes for conducting those tasks – including updating the Plan based on the current situation and/or as future opportunities arise and overseeing the renewal of the Plan during regular periods of time. 		<ul style="list-style-type: none"> Immediate (0-3 months)
		Roles
		<ul style="list-style-type: none"> Travel Drumheller (co-lead) Destination Development Plan implementation committee (co-lead) Public- and private-sector organizations supporting implementation of the Drumheller Destination Development Plan (support)
Tactical Actions		Outcomes
<ul style="list-style-type: none"> Identify tourism stakeholders who would be willing and able to be part of Drumheller’s Destination Development Plan implementation committee. Establish Drumheller Destination Development Plan implementation committee governance policies, key roles and identifying/assigning individuals to fill those roles. Draft and approve job descriptions for dedicated destination development coordinator and a possible support team Post job descriptions and hire identified roles. Work with Travel Drumheller and dedicated destination development coordinator (once hired) to develop detailed project plans for initiatives identified in the Plan. Meet regularly to get updates and provide direction on initiatives, address risks, and leverage learnings and opportunities. 		<ul style="list-style-type: none"> Achievement of Drumheller’s Destination Development Plan’s economic, social, and environment goals and objectives

PILLAR 1: DESTINATION LEADERSHIP

Initiative B: Establish and communicate tourism leadership role and strategy

<div>Description/Rationale</div> <ul style="list-style-type: none"> Despite strong communication and collaboration reported by tourism stakeholders across Drumheller’s tourism environment, many tourism stakeholders reported a need for yet more communication and collaboration, especially with some public sector, civic leaders, and Drumheller communities to improve appreciation of tourism as a benefit beyond economic and social returns. Many tourism stakeholders showed interest in learning more about tourism programs, and tourism businesses and entrepreneurs wanted opportunities to work together as well as with public sector and community partners (see Initiative 3B for more on communicating tourism benefits with residents). There is an opportunity for tourism to play an even larger role in the area’s economy by increasing open communications. For example, sharing existence and details of Drumheller’s Destination Development Plan, with stakeholders and providing more options for collaboration to connect tourism stakeholders so that they can continue to work together to generate solutions to support Drumheller’s tourism ambitions, while establishing tourism as an important economic driver. 	<div>Timeframe</div> <ul style="list-style-type: none"> Immediate (0-3 months) Ongoing <div>Roles</div> <ul style="list-style-type: none"> Travel Drumheller (lead) Public sector (support) Tourism businesses (support)
<div>Tactical Actions</div> <ul style="list-style-type: none"> Communicate across all potential funding channels a need to increase resources to accelerate the development of tourism in the region. Socialize Drumheller’s Destination Development Plan with all key tourism stakeholders. Consider creation of an internal task force focused on continuously communicating value of tourism for Drumheller’s economic, social, and environmental well-being, with an aim to improve prioritization of tourism as a primary economic driver. Hold meetings and workshops with key direct and indirect tourism stakeholders to ensure Drumheller’s Destination Development Plan is communicated and create additional ways of supporting. Host more industry events, workshops, and training highlighting new and innovative Drumheller tourism initiatives. 	<div>Objectives Met</div> <ul style="list-style-type: none"> Establish tourism leadership presence when planning for broader social initiatives Improve perception of tourism in community continued community engagement and alignment

PILLAR 1: DESTINATION LEADERSHIP

Initiative C: Conduct and share industry, market, and social tourism research

		QUICK WIN
<div>Description/Rationale</div> <ul style="list-style-type: none"> The tourism industry is continuously changing – from consumer behavior to communications solutions, and so much more. These changes need to be continuously understood for destinations and their stakeholders to make better decisions: <ul style="list-style-type: none"> Trends research to clarify expected shifts in global, domestic, and local tourism; Competitive research to know how to position Drumheller against its peers and potential threats; Consumer research in primary and up-and-coming target markets in Alberta, nearby provinces, the rest of Canada, the US, and internationally to understand travel consumer needs, behaviors, and paths-to-visit; and, Local sentiment research to ensure local community perceptions are considered as part of the decision-making process. Research needs to be sophisticated enough to support tourism businesses in understanding nuances, yet practical enough to be able to make decisions based on insights derived. Research may be conducted at a point in time (e.g., market segment research), while also providing continuous market updates in a standard format to the tourism industry. There are opportunities to work with potential research partners such as educational institutions (e.g., Campus Alberta Central) to collect, analyze, and synthesize data and research. 		<div>Timeframe</div> <ul style="list-style-type: none"> Short-term (3-12 months) Ongoing
		<div>Roles</div> <ul style="list-style-type: none"> Travel Drumheller (lead) Tourism research partners (support) Tourism businesses (support)
<div>Tactical Actions</div> <ul style="list-style-type: none"> Collect, analyze, share, and report on: <ul style="list-style-type: none"> global, domestic, and local tourism trends research with tourism stakeholders competitor research with tourism stakeholders primary target market research conducted through surveys and digital listening with tourism stakeholders current tourism assets throughout the region Conduct pulse checks on local sentiment, potentially including community engagement sessions to understand local needs and share with tourism stakeholders. Explore ways to share data and insights on implications with tourism stakeholders through online dashboards/solutions. 		<div>Objectives Met</div> <ul style="list-style-type: none"> Optimize number of experiences that are market-ready to attract more visitors and increase length of stay Improve awareness, interest, and action to visit across key target markets Improve perception of tourism in community through continued community engagement and alignment

PILLAR 1: DESTINATION LEADERSHIP

Initiative D: Support tourism innovation, entrepreneurship, and investment

<div>Description/Rationale</div> <ul style="list-style-type: none"> • There is no shortage of tourism opportunities, entrepreneurially-minded driven individuals, and potential funding available to support development and enhancement of tourism products and experiences across Drumheller. • The challenge is creating an inclusive environment that enables connection of opportunities, entrepreneurs, and investors to innovate and begin building products and experiences for Drumheller and visitors to enjoy. • Travel Drumheller and the Drumheller Economic Development Office should consider developing a stronger tourism investment environment with an initial focus on tourism real estate development (i.e., traditional and non-traditional accommodations) by identifying barriers to attracting tourism investment and developing a strategy to attract investors and connect them with opportunities. • Additionally, Travel Drumheller and the Drumheller Economic Development Office, in close coordination with innovation and entrepreneurship organizations across the region, need to foster a new and innovative mindset for tourism, by creating an environment that allows for risk-taking among tourism stakeholders. 	<div>Timeframe</div> <ul style="list-style-type: none"> • Medium-term (12-24 months) • Ongoing <div>Roles</div> <ul style="list-style-type: none"> • Travel Drumheller (co-lead) • Drumheller Economic Development Office (co-lead) • Regional entrepreneurship organizations (support) • Travel Alberta (support) • Ministry of Forestry, Parks and Tourism (support)
<div>Tactical Actions</div> <ul style="list-style-type: none"> • Create an investor attraction brief to entice potential investors to fund Drumheller tourism opportunities. • Explore opportunities to foster more innovation and entrepreneurship across the region in partnership with innovation and entrepreneurial organizations in the region. • Work with existing entrepreneurship and innovation organizations to identify entrepreneurs, matching them with potential tourism opportunities, and connecting them directly with investors and/or through investment pitch events. 	<div>Outcomes</div> <ul style="list-style-type: none"> • Optimize number of experiences that are market-ready to attract more visitors and to increase length of stay • Improve seasonality in winter and shoulder seasons to attract more and higher-yield visitors • Further entice investment and effective entrepreneurs to drive innovation • Support improvement in resident quality of life

PILLAR 1: DESTINATION LEADERSHIP

Initiative E: Address labour issues through “built in Drumheller” solutions

Description/Rationale	Timeframe
<ul style="list-style-type: none"> An identified bottleneck posing an immediate risk to tourism revenue generation, labour is an issue that nearly every destination in Canada, and around the world is facing. For Drumheller, this bottleneck consists of a lack of trained labour to support tourism operators, especially in the shoulder/winter season – potentially leading to the reduction in quality of offerings. It also consists of identifying reliable labour accommodations across the region. Bottlenecks are cumbersome for any one organization to manage. While Drumheller’s Destination Development Plan does not recommend that Travel Drumheller spearhead this bottleneck alone, it should seek to initiate collaboration through a cross-sectorial committee to address the issue as quickly as possible, to avoid further potential loss of tourism revenues in 2023 and beyond. Travel Drumheller should ensure that it has a seat at the table created to address the labour bottleneck and to advocate for the support that may be required by the tourism industry. This could include exploration of potential solutions such as improved benefits and/or accommodations for people in tourism, making it more attractive for younger and/or senior tourism workers to be part of the tourism industry, new tourism models, and digital solutions. 	<ul style="list-style-type: none"> Short-term (3-12 months)
	Roles
	<ul style="list-style-type: none"> Drumheller tourism labour committees (co-lead) Travel Drumheller (co-lead) Local labour organizations (co-lead) Local employment agencies (co-lead) Educational institutions (co-lead)
Tactical Actions	Objectives Met
<ul style="list-style-type: none"> Identify existing committees (or create a new one) focused on addressing labour bottlenecks in the region and ensure tourism is represented within those committees. Conduct detailed analysis of most pressing labour challenges and their causes (i.e., identification of qualified labour, labour housing, year-round labour, etc.) to explore solutions such as youth, senior engagement and/or new Canadian engagement, and support development of communication campaigns to promote tourism as a viable career path, partnership with educational institutions, etc. Communicate with key tourism stakeholders the role taken on labour committee(s) and strategies being undertaken to unburden labour bottlenecks, along with regular status updates of outcomes to increase stakeholder awareness and encourage leveraging and implementation of initiatives for their own operations. 	<ul style="list-style-type: none"> Optimize number of experiences that are market-ready to attract more visitors and to increase length of stay Improve seasonality in winter and shoulder seasons to attract more and higher-yield visitors Support improvement in resident quality of life

PILLAR 1: DESTINATION LEADERSHIP

Initiative F: Strengthen tourism partnerships with public-sector assets (e.g., Alberta Parks, Museums, etc.)

<div>Description/Rationale</div> <ul style="list-style-type: none"> Tourism stakeholders, both direct and indirect, across the area cited a lack of collaboration as a reason for the lack of a common tourism vision, redundant, inefficient, and ineffective utilization of municipal resources, and confusion as to the Drumheller tourism offering for visitors. This suggests working with tourism partners to identify opportunities for stakeholders from across the region (and perhaps beyond) to connect and network to form/enhance relationships and partnerships to support local and regional product development and promotional synergies. Improving opportunities for collaboration is an important way that Drumheller can demonstrate immediate value to its tourism stakeholders, as well as residents. This initiative should also consider opportunities to strengthen partnerships with public-sector organizations (e.g., Alberta Parks, museums, etc.), as well as other direct and indirect public and private-organizations, and associations such as the two museums, local colleges, and secondary schools to alleviate immediate labour bottlenecks (see Initiative 1F). 	<div>Timeframe</div> <ul style="list-style-type: none"> Medium-term (12-24 months) Ongoing <div>Roles</div> <ul style="list-style-type: none"> Travel Drumheller (co-lead) Direct and indirect tourism organizations and associations (support)
<div>Tactical Actions</div> <ul style="list-style-type: none"> Work with tourism industry leaders to create a list of collaboration and partnership opportunities, including regional networking events. Create and execute a collaboration and partnership plan and communicate opportunities with relevant tourism stakeholders, including hosting of regular meetings. 	<div>Outcomes</div> <ul style="list-style-type: none"> Establish tourism leadership presence when planning for broader social initiatives Improve perception of tourism in community continued community engagement and alignment Optimize number of experiences that are market ready to attract more visitors and to increase length of stay

PILLAR 2: DESTINATION DEVELOPMENT



PILLAR 2: DESTINATION DEVELOPMENT

Initiative A: Create more multi-day itineraries and experiences, especially shoulder/winter

		QUICK WIN
Description/Rationale	<ul style="list-style-type: none">Across Drumheller, while there may be lots to see and do for residents and visitors in the summer tourism season, the perception is that the shoulder/winter tourism season is more limited, especially in months such as October-April when the weather is less optimal.There is an opportunity for Drumheller to fill the void, based on an asset inventory exercise assessing existing tourism experiences and potential gaps, in combination with market information collected in Initiative 1C, to create a host of immersive products, events, experiences, packages, and itinerary options targeting various market segments year-round. Specifically, Drumheller has near-market ready opportunities to build out theater packages, culinary tours (including breweries and distilleries), and recreational biking tours, among others.Together with tourism stakeholders across Drumheller, Travel Drumheller should aim to go beyond supporting creation of simple tourism products and experiences, focusing on more immersive, diverse, inclusive, sustainable, and highly sought-after premium experiences year-round, especially for the shoulder/winter season.	<div>Timeframe</div> <ul style="list-style-type: none">Short-term (3-12 months)Ongoing <div>Roles</div> <ul style="list-style-type: none">Travel Drumheller (lead)Tourism businesses (support)Travel trade partners (support)
Tactical Actions	<ul style="list-style-type: none">Conduct an asset inventory of tourism products and experiences across Drumheller and tourism seasonsExplore, create, and communicate product, experiences, packaging, and itinerary options, with a focus on shoulder/winter tourism, based on findings from Initiative 1C.Work with various partners, such as tour operators, travel trade partners, and others, to promote tourism products, events, experiences, packages, and itinerary options.	<div>Objectives Met</div> <ul style="list-style-type: none">Optimize number of experiences that are market-ready to attract more visitors and to increase length of stayImprove seasonality in winter and shoulder seasons to attract more and higher-yield visitorsFurther entice investment and effective entrepreneurs to drive innovation

PILLAR 2: DESTINATION DEVELOPMENT

Initiative B: Consider development of existing/new tourism products and experiences

Description/Rationale	Timeframe/Trigger
<ul style="list-style-type: none"> With market research collected in Initiative 1C, Travel Drumheller, tourism operators, and investors can better understand opportunities to amplify product, experiences, and packages – or develop new ones altogether. This initiative focuses on working with operators, or groups of operators, and investors across Drumheller to enhance and/or develop enticing and game-changing products, experiences, and packages that stimulate demand (see options in Appendix E). Development of products, experiences, and packaging may include involvement of rural communities and players beyond tourism such as artists, culinary specialists, and other non-tourism businesses, and development of incentives to entice creation of enhanced/new products and experiences. Product and experience enhancements or new opportunity examples include: <ul style="list-style-type: none"> Badlands Amphitheatre enhancements Multi-sportsplex with adjacent/attached hotel 4–5-star health and wellness resort Hoodoos Trail infrastructure development 	<ul style="list-style-type: none"> Long-term (24+ months) Ongoing
	Roles
	<ul style="list-style-type: none"> Travel Drumheller (lead) Town of Drumheller (support) Travel Alberta (support) Public and private sector organizations (support)
Tactical Actions	Outcomes
<ul style="list-style-type: none"> Conduct inventory analysis of existing products and experiences to identify potential gaps Work with tourism operators and investors to explore, create, and communicate concepts and experience options linked to findings from Initiative 1C. Seek funding to support development of products, including working with the Town of Drumheller and surrounding communities to support investment in opportunities. 	<ul style="list-style-type: none"> Optimize number of experiences that are market-ready to attract more visitors and to increase length of stay Improve seasonality in winter and shoulder seasons to attract more and higher-yield visitors Further entice investment and effective entrepreneurs to drive innovation

PILLAR 2: DESTINATION DEVELOPMENT

Initiative C: Continue to revitalize Town of Drumheller downtown core for tourism

<div>Description/Rationale</div> <ul style="list-style-type: none"> Creation of more tourism asset concentration in downtown cores have created tourism vibrancy and an opportunity for tourism to thrive in destinations and regions across Canada, offering a place to stroll, shop, engage with others, eat, and experience the cultural highlights of the destination in an organized and well-programmed way. This opens the opportunity to feed into Drumheller’s downtown core, which could include creating pedestrian zones, standardizing aesthetics, and better wayfinding to and within the downtown core. As there are few downtown cores in neighbouring regions that create a concentration of businesses, people, entertainment, and so forth, this could provide Drumheller with a unique differentiator to further complement its existing products and experiences. It is important to note however, that for downtown cores to thrive, they must be activated – there must be a plan to create and animate them while considering issues such as adequate parking nearby so residents/visitors can participate. 	<div>Timeframe</div> <ul style="list-style-type: none"> Long-term (24+ months) Ongoing <div>Roles</div> <ul style="list-style-type: none"> Town of Drumheller (lead) Travel Drumheller (support)
<div>Tactical Actions</div> <ul style="list-style-type: none"> Work with the Town of Drumheller and ensure tourism’s involvement in Drumheller Downtown Area Revitalization initiatives to develop a downtown master plan (by season, day of week, time of day, etc.), including completing an environmental assessment of downtown and activation of both temporary (e.g., 3rd Ave W closures every weekend in the summer) as well as potential permanent street closures. Support creation of a working group to be accountable and responsible to oversee development and implementation of activation/animation plan for downtown area (i.e., support booking, budgeting, maintaining, etc.). 	<div>Outcomes</div> <ul style="list-style-type: none"> Optimize number of experiences that are market-ready to attract more visitors and to increase length of stay Improve seasonality in winter and shoulder seasons to attract more and higher-yield visitors Further entice investment and effective entrepreneurs to drive innovation

PILLAR 2: DESTINATION DEVELOPMENT

Initiative D: Enhance Drumheller creative industries experiences and infrastructure

<div>Description/Rationale</div> <ul style="list-style-type: none"> • The Drumheller region has a significant competitive advantage with its creative industries (e.g., film and theatre) due to films that have used Drumheller as a backdrop as well as its budding theatre scene, between existing infrastructure at the Badlands Amphitheatre and Rosebud. • Creative industries can play a significant role in attracting more people to visit Drumheller, perhaps even visiting during times of the year when visitation is lower (e.g., mid-week), but also stay longer, and return. • While these assets are currently available and being developed, it is not always clear whether this creative competitive advantage is optimized for tourism. Consideration should be given to work with leaders within the creative industries to identify and prioritize opportunities for further development and investment (see Initiative 1D). • This opportunity may include making space for colleagues in heritage and Indigenous areas, working with Drumheller’s arts and music scene, potentially branding itself as a music and entertainment hub. • Additionally, Drumheller’s brand could benefit from extension into developing products and experiences to support the “night economy” to bring visitors to a vibrant music and arts scene downtown (see Initiative 2C). 	<div>Timeframe</div> <ul style="list-style-type: none"> • Medium-term (12-24 months) • Ongoing <div>Roles</div> <ul style="list-style-type: none"> • Travel Drumheller (co-lead) • Badlands Amphitheater (co-lead) • Rosebud Theater (co-lead) • Tourism operators (support) • Individuals in creative industries (support)
<div>Tactical Actions</div> <ul style="list-style-type: none"> • Work closely with creative industry assets to identify opportunities for further development and investment • Communicate opportunities to potential investors. • Consider creating itineraries and packages at various times of the year (see Initiative 2A) to fill periods of lower visitation and to simplify the purchase process. 	<div>Outcomes</div> <ul style="list-style-type: none"> • Optimize number of experiences that are market-ready to attract more visitors and to increase length of stay • Improve seasonality in winter and shoulder seasons to attract more and higher-yield visitors • Further entice investment and effective entrepreneurs to drive innovation • Support improvement in resident quality of life

PILLAR 2: DESTINATION DEVELOPMENT

Initiative E: Optimize Drumheller region trail system to accommodate various traveller segments

<div>Description/Rationale</div> <ul style="list-style-type: none"> • Drumheller and the region is already known for its walking, hiking, biking, and adventurous trails and paths in unique terrain; and, there is already a wealth developed trails (or plans for trails) that can be accessed (e.g., Rails to Trails, path from Midland Park to Drumheller). • For many residents and visitors, there may be a desire to experience more of what the Drumheller region’s trails and paths however, lack of reliable infrastructure and not knowing what to expect may prevent them from enjoying this important offering. There is an opportunity for the Drumheller region to optimize its trail system to accommodate more visitor segments such as families, older travellers, and those a little less adventurous. • Optimizing the Drumheller region’s trail system may go beyond grooming, maintenance, and improved signage to communicate what can be expected, identifying/creating trail experiences, and packaging them together with accommodations, food and beverage, and other tourism products. • These products require additional research (see Initiative 1C) to understand market needs, development, packaging (see Initiative 2A), and marketing support (see Initiatives 3C and 3D) to effectively grow. 	<div>Timeframe</div> <ul style="list-style-type: none"> • Medium-term (12-24 months) • Ongoing
<div>Tactical Actions</div> <ul style="list-style-type: none"> • Work with town of Drumheller and other regional trail and path custodians to ensure tourism representation in the Drumheller Municipal Development Plan as it relates to developing a world-class trail system and identify, create, and execute additional focused trail and path strategies and plans that support trends in demand (see Initiative 1C). 	<div>Roles</div> <ul style="list-style-type: none"> • Travel Drumheller (co-lead) • Trail and path custodians (co-lead) • Tourism businesses (support) <div>Objectives Met</div> <ul style="list-style-type: none"> • Optimize number of experiences that are market-ready to attract more visitors and to increase length of stay • Improve seasonality in winter and shoulder seasons to attract more and higher-yield visitors • Further entice investment and effective entrepreneurs to drive innovation • Support improvement in resident quality of life

PILLAR 2: DESTINATION DEVELOPMENT

Initiative F: Identify and support enhancement of tourism/social infrastructure

<div>Rationale/Description</div> <ul style="list-style-type: none"> Tourism stakeholders from across Drumheller cited a lack of tourism infrastructure to support visitation such as public washrooms, river access, parking, Wi-Fi, electric vehicle charging stations, among others. Additionally, there is a tremendous amount of under-utilized infrastructure that can be better leveraged to ensure higher return on investment for Drumheller and surrounding communities, while also enhancing the visitor experience. This initiative focuses on collecting data on existing and upcoming tourism infrastructure throughout the area, mapping it, and identifying areas where there may be potential gaps in infrastructure for eventual implementation. 	<div>Timeframe/Trigger</div> <ul style="list-style-type: none"> Long-term (24+ months)
	<div>Roles</div> <ul style="list-style-type: none"> Town of Drumheller (co-lead) Surrounding Drumheller communities (co-lead) Travel Drumheller (co-lead)
<div>Tactical Actions</div> <ul style="list-style-type: none"> Working with the Town of Drumheller, local communities, and economic development offices, identify list of infrastructure projects across the area to prioritize ones most likely to have greater return on investment financially for tourism and socially for the communities in which they are located. Work with partners to support development of the business case for identified infrastructure investments, and advocate for, and implement infrastructure projects. 	<div>Outcomes</div> <ul style="list-style-type: none"> Optimize number of experiences that are market-ready to attract more visitors and to increase length of stay Improve seasonality in winter and shoulder seasons to attract more and higher-yield visitors Further entice investment and effective entrepreneurs to drive innovation Support improvement in resident quality of life

PILLAR 2: DESTINATION DEVELOPMENT

Initiative G: Train local businesses in product and experience development based on consumer demand

		QUICK WIN
Description/Rationale	<ul style="list-style-type: none">While some tourism businesses expressed satisfaction with the support that they currently receive from Travel Drumheller, one area where they agreed they would welcome more support is in training, particularly around understanding of target markets (especially those that might be interested in traveling in the shoulder/winter seasons) and understanding of existing gaps in tourism products and services, to potentially fill those gaps.With research conducted in Initiative 1C, Travel Drumheller should develop training materials and access to sessions to help businesses better understand how to serve markets and traveller segments.Training topics may include shoulder/winter tourism products and experiences, accessing grants and funding opportunities, developing high-yield tourism products and experiences, creating resilient businesses to withstand times of crises, dynamic pricing, accessible travel, sustainable business practices, and others – via courses, online videos, seminars, webinars, and other channels.	<div>Timeframe</div> <ul style="list-style-type: none">Short-term (3-12 months)Ongoing <div>Roles</div> <ul style="list-style-type: none">Travel Drumheller (lead)Local tourism businesses (support)
Tactical Actions	<ul style="list-style-type: none">Identify most prominent tourism business training and education needs in Drumheller, starting with training on shoulder/winter markets and segments.Create and execute tourism business training and education plan.Develop training and educational materials to support the plan and provide online access to relevant tourism stakeholders, including directing businesses to third-party resources based on identified needs.	<div>Objectives Met</div> <ul style="list-style-type: none">Optimize number of experiences that are market-ready to attract more visitors and to increase length of stayImprove seasonality in winter and shoulder seasons to attract more and higher-yield visitors

PILLAR 2: DESTINATION DEVELOPMENT

Initiative H: Provide training and incentives to encourage more sustainable tourism

		QUICK WIN
Description/Rationale	Timeframe	
<ul style="list-style-type: none">Separately, but following the previous initiative (see Initiative 2F), and in support of the Drumheller Destination Development Plan’s third goal that focuses on environmental protection and preservation through tourism, Travel Drumheller has a duty to develop tourism that is reflective of global sustainability objectives and its responsibility towards the environment.While the topic of sustainable tourism was brought up often during the Discovery phase, there was a lack of uniform understanding of its importance for tourism in Drumheller, and more significantly, what tourism stakeholders – from businesses, to entrepreneurs, and other public and private sector organizations – should do about it.It is important for Travel Drumheller to develop a common understanding and vision for sustainable tourism and training and educational supports for various stakeholders to ensure a minimum standard of understanding, along with specific actions that each can, and perhaps should, take to ensure the tourism industry is aligned towards a sustainable tourism future.While all tourism businesses should be thinking of sustainable tourism, Travel Drumheller may also determine to supplement sustainable tourism training with an incentives program to entice more tourism businesses to think more sustainably.	• Medium-term (12-24 months)	
	Roles	
	<ul style="list-style-type: none">Travel Drumheller (lead)Tourism businesses (support)	
Tactical Actions	Objectives Met	
<ul style="list-style-type: none">Work with experts to define sustainable tourism for the Drumheller region, along with specific actions that each stakeholder can take to align with Drumheller’s sustainability vision.Develop an understanding of what Travel Drumheller is doing with regards to its sustainable tourism efforts to determine ways to support themes through programming, marketing, and communications.Create and execute a sustainable tourism training and education plan.Develop training and educational materials per the Plan and provide online access to relevant tourism stakeholders.	<ul style="list-style-type: none">Optimize number of experiences that are market-ready to attract more visitors and to increase length of stayImprove seasonality in winter and shoulder seasons to attract more and higher-yield visitors	

PILLAR 3: DESTINATION PROMOTION



PILLAR 3: DESTINATION PROMOTION

Initiative A: Build a Drumheller tourism marketing collective that includes brand enhancement

Description/Rationale	Timeframe
<ul style="list-style-type: none">Some tourism stakeholders expressed confusion as to what Travel Drumheller’s brand position is while others expressed a need to modernize it in order to change the Drumheller narrative that has been around for decades, primarily centered around dinosaurs.Success of Travel Drumheller’s marketing efforts are reliant on building trust and cooperation among stakeholder groups to ensure that they see themselves in the marketing, that they feel the marketing is strengthening their own efforts, and that it is bringing communities together for common good.A collective of operators and organizations will help improve tourism performance and encourage an opportunity for tourism in Drumheller that is shared by all, to grow number of visits, length of stay, spending, and dispersion throughout the region.Brand development is needed to continue to build tourism culture and community, as well as to better communicate what the Drumheller of tomorrow is all about. Note that brand development goes beyond just the logo and supports development of the overall brand platform (narrative, messages, tone, etc.), for the destination.	<ul style="list-style-type: none">Short-term (3-12 months)
	Roles
	<ul style="list-style-type: none">Travel Drumheller (co-lead)Tourism marketing committee (co-lead)Public and private sector organizations (support)
Tactical Actions	Outcomes
<ul style="list-style-type: none">Set up a tourism marketing collective (or committee) for ongoing input, guidance and direction.Create a Drumheller brand strategy with recommendations to modernize the Drumheller brand.Meet regularly to get updates from various participants, address challenges, and leverage learnings.Adopt and execute brand recommendations.	<ul style="list-style-type: none">Improve awareness, interest, and action to visit across key target marketsImprove perception of tourism in community continued community engagement and alignment

PILLAR 3: DESTINATION PROMOTION

Initiative B: Launch “value of tourism” community campaigns

		QUICK WIN
Description/Rationale		Timeframe
<ul style="list-style-type: none"> Key to many destinations’ long-term success points to the industry engaging with host communities and businesses catering to residents as their primary customer. Drumheller is made up of a collective of passionate, engaged residents that care about their home. They are invested in its future and in how it is shared with visitors. Furthermore, friends and relatives may be a primary source of independent travel and information for travel, especially for new residents – they carry influence and can be a top motivator for future tourism. Leverage data collected from Initiative 1C on resident sentiment to engage and invest in reaching locals. This will further pride and equity in the region and provide a two-way channel for communication to improving resident quality of life and appreciation of the benefits of tourism. 		<ul style="list-style-type: none"> Immediate (0-6 months) Ongoing
		Roles
		<ul style="list-style-type: none"> Travel Drumheller (lead) Public and private sector (support) Community organizations (support)
Tactical Actions		Objectives Met
<ul style="list-style-type: none"> Conduct annual resident sentiment research. Set up a “Locals Know” stream of content – consider local spokespeople to share Travel Drumheller’s plans. Develop an ongoing communications and marketing plan targeting residents and seek local media partnerships. 		<ul style="list-style-type: none"> Improve awareness, interest, and action to visit across key target markets Improve perception of tourism in community continued community engagement and alignment

PILLAR 3: DESTINATION PROMOTION

Initiative C: Update campaigns targeting Albertans

		QUICK WIN
Description/Rationale		Timeframe
<ul style="list-style-type: none"> With initial focus on demand beyond just summer season, to increase tourism revenues for local communities and tourism operators, Travel Drumheller should continue to focus on immediate opportunities to drive visitation and revenues. As it develops more experiences and packages (see Initiative 2A) to entice visitors, it should continue to build connections with potential visitors among its most attentive audience: Albertans. In the near term, despite many travellers choosing destinations worthy of “revenge tourism”, or making up for lost time, by going further away and for longer periods of time, global evidence suggests many travellers will continue to look closer to home for getaways – now is an opportunity for Drumheller to keep pursuing the momentum. Additional research (see Initiative 2A) will be required to get a better understanding of Albertan consumer behaviors, desires, and aspirations, which have no doubt shifted in recent years, to ensure that campaigns are relevant and strike at the right point of the visitor’s path-to-visit. Finally, because of improvements in technology and marketing approaches, destination marketing is trending towards smaller more flexible campaigns to enable quick adaptation to changing environments and meeting travellers where they are. 		<ul style="list-style-type: none"> Short-term (3-12 months) Ongoing
		Roles
		<ul style="list-style-type: none"> Travel Drumheller (lead) Travel Alberta (support)
Tactical Actions		Outcomes
<ul style="list-style-type: none"> Incorporate smaller, more flexible campaigns targeting Albertans into the marketing plan, backed by evidence collected in Initiative 2A; these may be holiday or theme-based such as around Christmas, Canada Day, and two- or three-day getaways. Execute all marketing campaigns. 		<ul style="list-style-type: none"> Improve awareness, interest, and action to visit across key target markets

PILLAR 3: DESTINATION PROMOTION

Initiative D: Create Smaller, More Flexible Campaigns Targeting US Travellers

<div>Rationale</div> <ul style="list-style-type: none">• In the same vein as Initiative 3D, this Initiative focuses on opportunities to welcome US travellers as an important high-yield drive market.• US travellers historically represented a large portion of visitation and tourism revenues in the Canadian Badlands (after Albertans) and targeting those within a driving-distance through small and nimble marketing campaigns to entice them to visit, would support tourism businesses.• Additional research (see Initiative 1C) is required to gain stronger understanding of specific target markets behaviours, desires, and aspirations to ensure appropriate messaging reaches them at their current point in their path-to-visit, and through the right channels.	<div>Timeframe</div> <ul style="list-style-type: none">• Short-term (3-12 months)• Ongoing <div>Roles</div> <ul style="list-style-type: none">• Travel Alberta (lead)• Travel Drumheller (support)
<div>Tactical Actions</div> <ul style="list-style-type: none">• Incorporate smaller, more flexible campaigns targeting US travellers into the marketing plan, backed by evidence collected in Initiative 1C; these may be holiday or theme-based such as around Christmas, Canada Day, and two- or three-day getaways.• Execute all marketing campaigns.	<div>Outcomes</div> <ul style="list-style-type: none">• Improve awareness, interest, and action to visit across key target markets

PILLAR 3: DESTINATION PROMOTION

Initiative E: Strengthen online distribution and sales support

<div>Description/Rationale</div> <ul style="list-style-type: none"> Travel agents, OTAs, Trip Advisor, etc., are relevant across the consumer planning and booking journey – from awareness, to engagement, and conversion. Many Drumheller operators are not leveraging these channels to their maximum benefit. Travel Drumheller can help to educate and nurture a multi-channel approach (Google is the primary channel to optimize as it is the starting point for most trip planning). Niche tour operators may provide immediate opportunities for promotion of Drumheller experiences. 	<div>Timeframe</div> <ul style="list-style-type: none"> Short-term (3-12 months) Ongoing <div>Roles</div> <ul style="list-style-type: none"> Travel Drumheller (lead)
<div>Tactical Actions</div> <ul style="list-style-type: none"> Identify potential trade partners by niche, reach, and audiences to leverage insights from Initiative 1C. Prioritize travel trade itineraries, pulling together a travel trade plan and execute. Share itineraries and routes with travel trade partners in advance of going live to help identify what might be missing, what might be needed, to adjust and refine, as needed. Build a trade-ready plan for operators working on delivery of education and training as needed. 	<div>Outcomes</div> <ul style="list-style-type: none"> Improve awareness, interest, and action to visit across key target markets

PILLAR 3: DESTINATION PROMOTION

Initiative F: Support a visitor services program with focus on operators

<div>Description/Rationale</div> <ul style="list-style-type: none"> Visitors seek information from a variety of sources in a complex ecosystem: <ul style="list-style-type: none"> Mobile/on-line: social media, web searches, review sites, booking sites, destination content Person-to person: local ambassadors, visitor centres, front line staff Training in customer service and product knowledge is needed for all front-line staff. This feeds into improved growth of a tourism culture – to create a sense of place for visitors, a sense of welcome, and collaboration among tourism operators and residents alike. Social media is the primary digital channel to provide real-time visitor services – it is the “always on” customer service channel and will need to be managed accordingly. 	<div>Timeframe</div> <ul style="list-style-type: none"> Short-term (3-12 months) Ongoing <div>Roles</div> <ul style="list-style-type: none"> Travel Drumheller (lead)
<div>Tactical Actions</div> <ul style="list-style-type: none"> Create and optimize digital tools to engage with visitors across all channels, consider building an online hub for partners to upload materials to be shared, a quick response (QR) code program to promote itineraries/routes. Be prepared to respond to individual requests through social media. Review existing visitor service centres and seek opportunities for distribution of QR code posters/rack cards/signage. Promote the value of a regional approach to sharing content, recommendations, and travel information to stakeholders. Encourage residents to engage with visitors and share their recommendations. 	<div>Outcomes</div> <ul style="list-style-type: none"> Improve awareness, interest, and action to visit across key target markets

PILLAR 4: LONGER-TERM DEVELOPMENTAL WINS



Additional Initiatives to Consider

The purpose of Drumheller’s Destination Development Plan is to create a tourism roadmap for Drumheller for the next months and years to come.

While some initiatives identified in the strategy are one-off initiatives, many are “ongoing”, meaning that they are initiatives that may need to be continued perpetually.

As resources become available, and as prioritized initiatives are completed or are no longer

relevant, Travel Drumheller should consider the following list of already prioritized initiatives identified during the Discovery phase of the Plan’s development.

After initial initiatives have been implemented, Travel Drumheller’s leadership may want to determine if these additional initiatives should be added to accomplish its objectives.

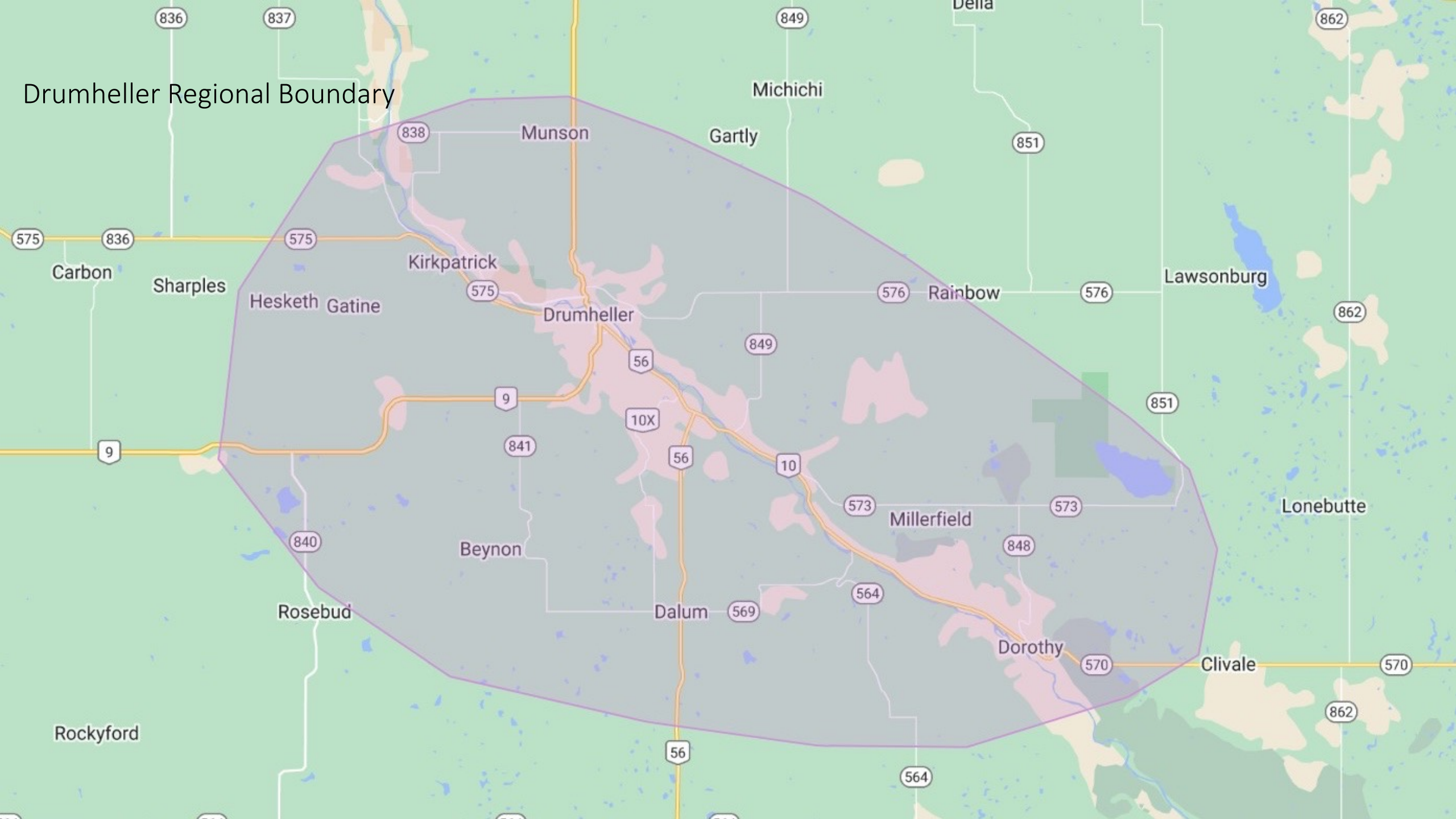
Opportunity	Description
Develop and implement a sport tourism strategy, including support for development of new sporting facilities	Identify potential sport tourism development opportunities and create a specific sport tourism strategy, including potential facilities to encourage visitation to the Drumheller region for sporting purposes, while extending stays for leisure activities and additional spend.
Develop and implement culinary tourism strategy	Identify potential culinary tourism development opportunities and create a specific culinary tourism strategy to encourage visitation to the Drumheller region for culinary purposes, or as an add-on to an existing trip, while extending stays for leisure activities and additional spend.
Develop and implement health and wellness tourism strategy	Identify potential health and wellness tourism development opportunities and create a specific health and wellness tourism strategy to encourage visitation to the Drumheller region for health and wellness purposes, while extending stays for leisure activities and additional spend.
Advocate for town of Drumheller masterplan that includes tourism	Advocate for urban master planning supporting the Drumheller region to include tourism to ensure tourism interests such as public washrooms, visitor information areas, pedestrian areas, charging stations, etc., are represented.
Address transportation challenges in and around Drumheller	Work with key tourism stakeholders as well as the Ministry of Transportation to identify ways to provide more transportation options to, and around, the Drumheller region. Also includes identifying ways to improve and standardize wayfinding throughout area.



APPENDIX A: DEFINING THE DRUMHELLER REGION

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Drumheller Regional Boundary





APPENDIX B: DRUMHELLER TOURISM TODAY
(GLOBAL, DOMESTIC, & LOCAL TRENDS)

The world is at a crossroads geopolitically and technologically.

POLITICAL	ECONOMIC	SOCIAL	TECHNOLOGICAL	ENVIRONMENTAL	REGULATORY
<ul style="list-style-type: none"> The Russian invasion of Ukraine started a war with catastrophic consequences, which led to Russia’s isolation by NATO allies, and China still maintaining a distant position. The EU is looking to reassert its role both politically and economically with joint policy against Russia. Divisions over lockdown measures have led to an unusually high level of political polarization in the West. China continues to come under scrutiny for human rights abuses, and the on-going zero tolerance on COVID has meant that a slower economic recovery. 	<ul style="list-style-type: none"> The war in Ukraine has led to concerning levels of inflation, especially in wheat, oil and gas, and electricity prices, as well as worsening global supply chain disruption. NATO allies have imposed unprecedented sanctions on Russia, deeply impacting their domestic economy and access to international markets. The impact of Omicron variant put global economic recovery on hold in Q1 2022, despite the virus shifting from pandemic to endemic phase. The global tourism industry continues it’s recovery efforts but still far from 2019 levels of expenditures and visitation. 	<ul style="list-style-type: none"> Europe is facing the biggest humanitarian and refugee crisis since WWII, with millions of Ukrainians having fled the country. COVID-19 has precipitated worldwide social isolation, with increasing rates of mental health issues affecting particularly young people which is expected to be felt for some time. Globally, there has been a widespread increase in racial tensions and rise of racial justice movements. Migrations out of major cities made possible in-part by remote work options, has taken place – particularly in developed countries such as Canada. 	<ul style="list-style-type: none"> Blockchain and cryptocurrency seems to be intermittently resurgent despite financial speculation in markets, with the world looking for new ways to bank and secure incomes. Artificial Intelligence, 5G wireless networks, and other digital technologies will form the backbone of the digital economy but also increase geopolitical competition. The main political blocks of the US., EU and China are expected to compete for greater self-reliance, particularly in digital technologies. Corporate and office-based companies have increasingly moved to remote-working . 	<ul style="list-style-type: none"> Climate change continued to disrupt ecosystems, with natural disasters becoming more usual and devastating, such as ongoing wildfires, hurricanes and water shortages in major hubs such as California. Environmental, Social, and Governance (ESG) fund flows defied pandemic panic. Environmental factors came to the fore, as the European Union began to finance part of its relief package through green bonds. Ambitious climate policy agendas are likely (often as part of COVID-19 stimulus plans) as more countries announce carbon neutrality targets. 	<ul style="list-style-type: none"> NATO countries have demonstrated a high level of coordination to respond against Ukraine’s invasion, but some efforts are still perceived as not effective enough. Non-governmental forces largely failed to take a lead in the fight against the pandemic, leading some to suggest a greater role for the state in the post-pandemic world. Export controls, restrictions on cross-border people movement will create additional risks in markets around the world. Global travel restrictions are for the most part lifted but uncertainty remains around the upcoming winter and potential negative impacts and increases in cases.

2022’S TOP 20 TRENDS SHAPING THE FUTURE OF TOURISM

Drumheller has strong competitive positioning to capitalize on many emerging trends.

Trend	Experiences are the new luxury	Regenerative travel going local	Bucket list destinations now, not later	Single destination, longer stays	Wellness for all
Description	The value of travel and tourism will increase even more in 2022, boosting consumer spending towards unique travel experiences. The lack of travel caused by the COVID-19 pandemic has turned tourism into a scarce, luxury good.	Regenerative travel will support tourism as a key pillar for sustainable economic development for destinations. 83% of global travellers will make sustainable travel a priority in the future, while 66% want their travel spending to directly benefit local communities.	After cancelled trips and postponed celebrations, travellers are ready to make up for lost time and are ready for that dream bucket list trip. Over the next year, 40% of travellers are more willing to treat themselves and spend more money than usual on their next trip.	The complexity of arranging a trip pre and post testing, differing vaccine passport protocols and the uncertainty of new COVID-19 waves will result in travellers booking fewer trips but increasing the length of their stay and in a single country - ‘Travel less, travel better’ will determine booking behaviour this year.	The wellness and spa sector is expected to grow 17% annually through 2025, confirming the increasing appeal of wellness travel within the tourism industry, with up to 76% of travellers wanting to spend more on travel experiences that improve their wellbeing and mental health.
Key takeaway for Drumheller	Due to the unique attractions of Drumheller, focusing on their historical and natural landscape, the town is able to provide an experience unlike their peer destinations.	Destinations, such as Drumheller, that bet on nature-based products and activities will take market share from more urban destinations that fail to pivot, while giving tourism leadership to the local community will be a differentiator in the global market.	Well-designed marketing strategies enticing travellers to Drumheller will be key to reaching wider consumer segment willing to invest heavily in the destination during their trip. Create the sense of wonder and bucket list reason to visit.	This aligns directly with the mission of Travel Drumheller with many strategic plans aiming to capitalise on existing visitors, making their stays longer or initiating returns to the area.	The natural aspects of the town with many outdoor activities promote health. This could be extended and enhanced, to include more relaxation activities. In this way, capitalizing on existing wellness assets and experiences, as well as designing and implementing marketing strategies to boost this segment should be a priority.

2022’S TOP 20 TRENDS SHAPING THE FUTURE OF TOURISM

Destinations that plan and strategize to leverage these trends are likely to increase market share.

Trend	Health & Safety is standard	Inspiration from streaming & social media	Exotic destinations attract young travellers	Tourism labour continues to be a bottleneck	Remote work creates a new definition of tourism
Description	70% of travellers say that respect for COVID-19 safety guidelines and restrictions is important when deciding on a travel brand, resulting on travellers now feeling safer when health-focused measures are in place in eating, shopping, and tourism locations.	Watching Tik Tok and Instagram influencers create or push inspirational travel content is no longer a niche, while streaming services such as Netflix and HBO provide new endless opportunities to create destination awareness - think Game of Thrones for Dubrovnik from 2010 and beyond to White Lotus for Hawaii in 2021.	Younger travellers are not looking exclusively for simple sun and beach holidays. They also want an immersive adventure, often involving high doses of adrenaline and off-the-beaten-path remote destinations. Also, they will be first to take the higher risk of returning to travel.	Demand for labour in hospitality remains strong, but hospitality workers finding other careers due to COVID-19 industry disruption and demographic trends will drive a long-term worker shortage severely impacting service, availability of hotel rooms and other tourism experiences.	An emerging trend since COVID-19; remote work is here to stay. Last year proved that productivity and employee satisfaction increased, while business costs benefited from it as a result of giving the opportunity to temporarily relocate and work in more inspiring surroundings.
Key takeaway for Drumheller	Continued consumer demand for high levels of health and safety require Drumheller to invest in infrastructure surrounding this. The Drumheller region is a known flood community, thus flood mitigation strategies are integral to all strategic development plans.	Targeted filming and production incentive programs, partnerships with streaming services and social media influencers will need a higher investment from Drumheller and region in order to build a strong brand, giving tools to local storytellers to showcase the destination’s unique culture, history and natural landscape to the global stage.	Destinations such as the Drumheller region that are able to go beyond traditional offerings to cater and communicate to the most adventurous travellers will build a strong, future-proof competitive advantage.	Improving childcare, managing health risks and rising wages are among initiatives destinations such as the Drumheller region should focus on, as well as upskilling of the local tourism workforce and developing tourism education partnerships to engage future labour into tourism.	Drumheller and region should develop new products across the tourism value chain, such as workcation packages equipped accommodations or co-working spaces and communities packages with hotel or inn stays. This gives visitors the opportunities to explore the Drumheller region for longer periods of time.

Canada is a largely stable society, although political changes are likely in the wake of recently waning popularity of the current federal government.

POLITICAL	ECONOMIC	SOCIAL	TECHNOLOGICAL	ENVIRONMENTAL	REGULATORY
<ul style="list-style-type: none">• Canada is one of the world’s safest countries with a stable political environment which continues to help attract tourists from across the world.• Justin Trudeau has been the Prime Minister of Canada since 2015. Despite implementing various progressive interventions over his time in charge, his popularity is waning with his disapproval rate reaching its highest level in fall 2022.• A change in leadership in the next election is likely, with the Conservative Party leading polls.• Canada has provided more than \$600 million in military support to Ukraine since February 2022.	<ul style="list-style-type: none">• Canada’s economy registered a GDP growth of 6.7% in 2021 however, projections for future growth puts the country at a more muted 3.8% for 2022.• Unemployment in the country is currently measured at 5.5%, and is predicted to remain stable for the foreseeable future.• Inflation is currently measured at 5.7%, which is considered higher than moderate. High inflation is expected to remain and will affect consumer spending on discretionary goods and services.• Extended border closures as part of the pandemic response particularly affected industries such as aviation, aerospace, and tourism and hospitality.	<ul style="list-style-type: none">• Canada is a very culturally diverse country, with a high proportion of immigrants.• The country has a shortage of skilled workers in a number of sectors, which its government is attempting to mitigate with training and development and a flexible immigration system.• The living standard in Canada is one of the highest in the world and residents show high levels of confidence in the country’s economy and the job market.• There are some concerns around income inequality in the country, with 40% of wealth controlled by 10% of the richest individuals in the country.	<ul style="list-style-type: none">• Both public and private investments in Canada’s technology industry are growing swiftly. In addition, political, economic and social stability have made the country a fertile ground for entrepreneurship advancement.• Canada is seen as one of the best countries in the world for IT professionals and firms to advance their careers and grow their businesses.• Emerging technologies such as Big Data Analytics, Blockchain, Augmented Reality, Virtual Reality, 3D printing, and artificial intelligence will continue to impact the Technological environment.	<ul style="list-style-type: none">• Canada’s natural landscapes attracts millions of tourists from across the world and play a key role in the promotion of the tourism industry.• Destinations around Canada continue to develop and implement both geographical and seasonal dispersion strategies to mitigate over-tourism of some of Canada’s more important environmental assets.• The Canadian government has passed a Net Zero Emissions Accountability Act wherein it aims to have a carbon neutral economy by 2050. The government is also banning single-use plastic and has announced the banning of all gasoline vehicles from 2035.	<ul style="list-style-type: none">• Canada removed all remaining COVID-19 related travel restrictions as of October 1, 2022 and no longer required visitors to be vaccinated.• Canada has a large number of laws for regulating public, small, and large businesses. These protect the rights of ordinary employees and workers and deal with issues such as working hours, minimum wage laws, vacation leaves, and sick days.• The current government introduced a number of regulatory interventions during its term, including the Cannabis Act, Federal Carbon Tax, and Paris Agreement on climate and environmental change.

DOMESTIC PERFORMANCE FORECAST

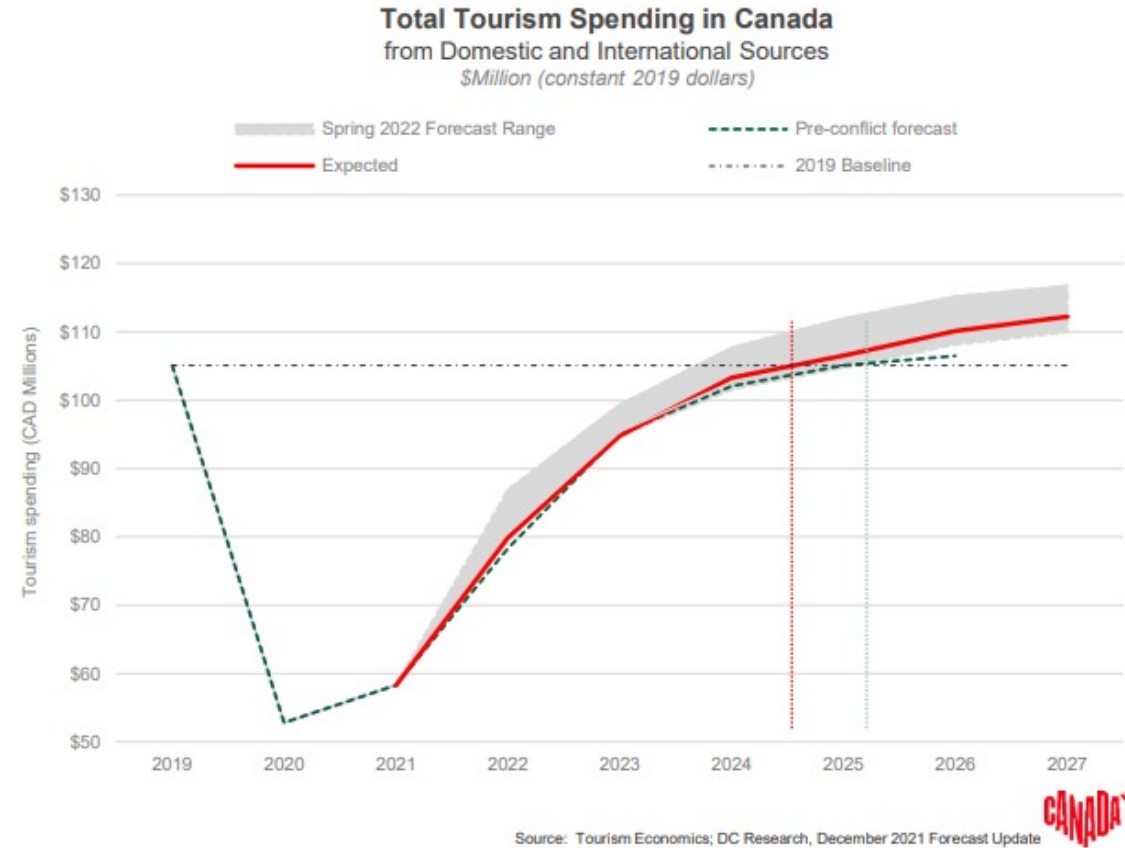
Total tourism spend in Canada is forecasted to return to 2019 levels by 2025.

OVERALL - TOTAL TOURISM SPENDING TO CANADA FROM DOMESTIC AND INTERNATIONAL SOURCES

Given the ongoing recovery from low levels of international travel, even the severe scenario anticipates continued recovery for Canada.

The upside scenario assumes:

- Lower impact of conflict on the global economy
- France and UK affinity to Canada
- Early easing of COVID-19 measures in the US and China



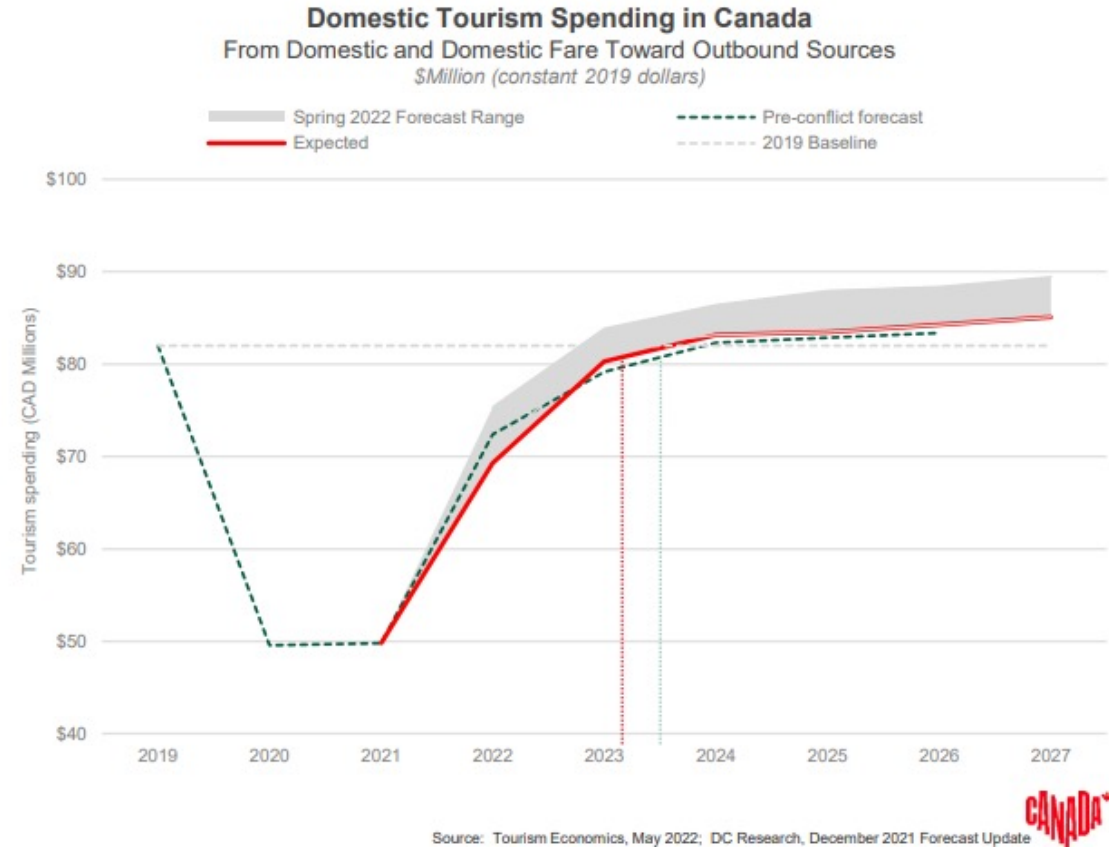
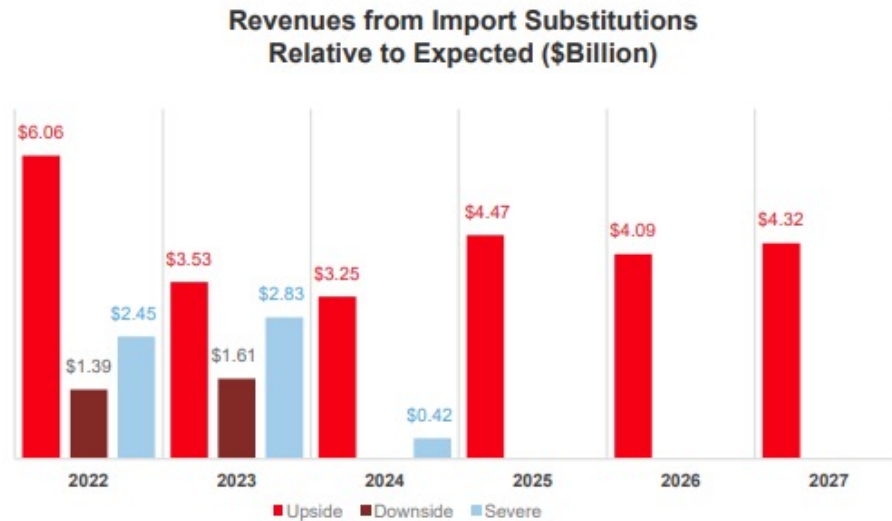
DOMESTIC PERFORMANCE FORECAST

Domestic tourism will continue to drive sector recovery, returning to 2019 levels by 2024.

TOTAL TOURISM SPENDING TO CANADA FROM DOMESTIC SOURCES

Under the downside and severe scenarios, uncertainties surrounding security concerns, geopolitical risks and inflationary pressures would entice travellers to exhibit preference for domestic destinations, continuing the substitution of outbound-to-domestic trend observed amid the pandemic.

The upside scenario assumes a persistent substitution effect.



DOMESTIC PERFORMANCE FORECAST

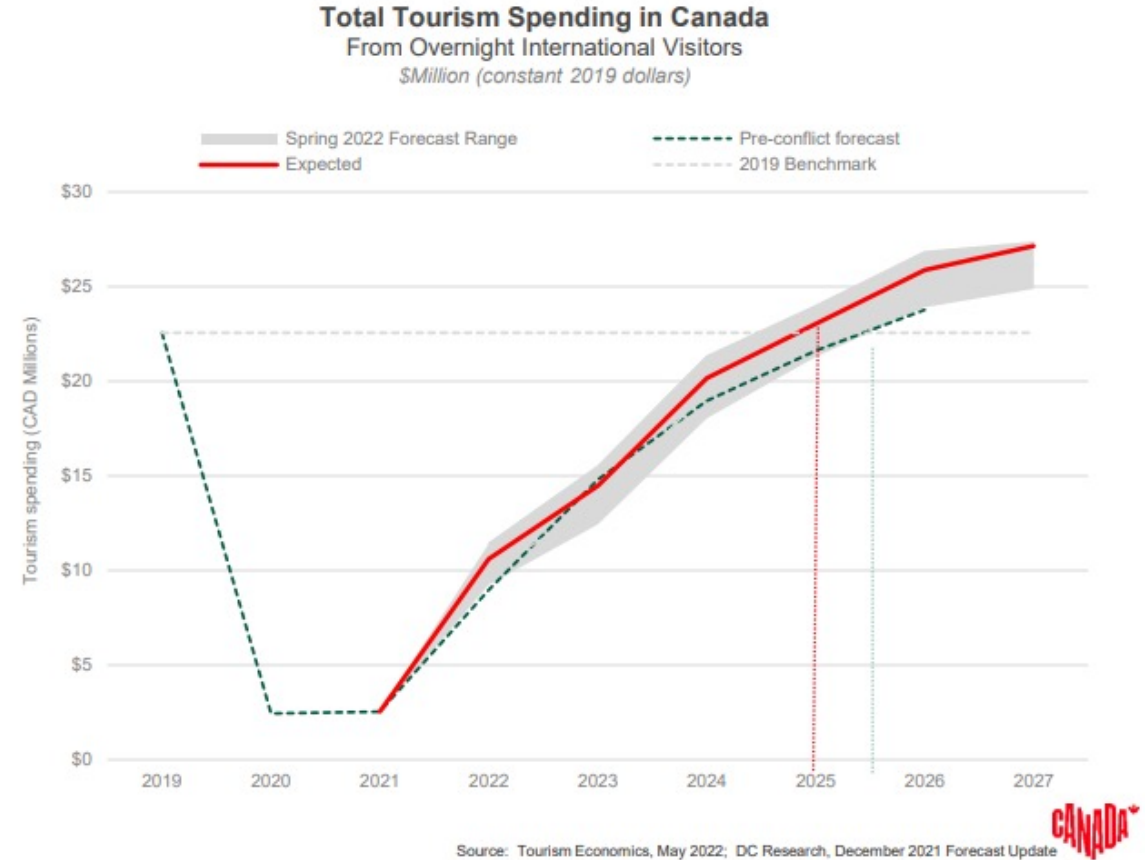
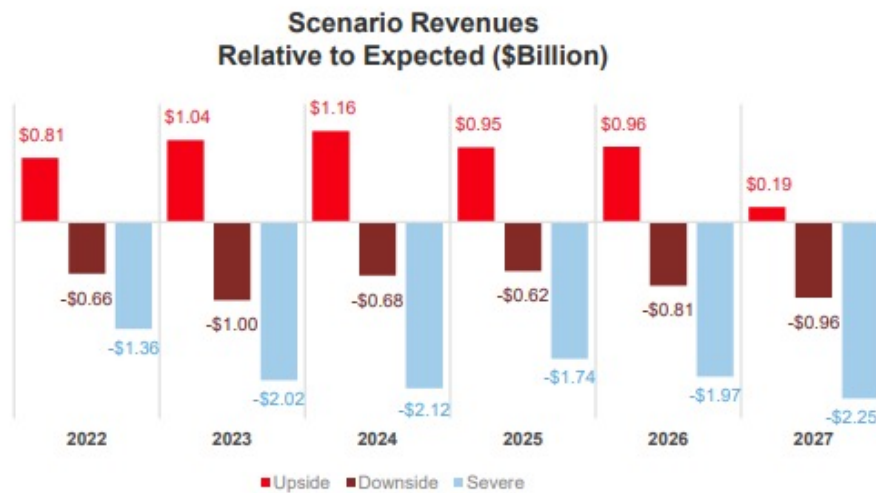
North American and Asia-Pacific markets to minimize risk exposure from Europe.

TOURISM SPENDING TO CANADA FROM INTERNATIONAL MARKETS (TOURISM EXPORTS)

Full recovery of international travel to Canada is expected in 2025 in the baseline and downside scenarios, and in 2026 in the severe downside scenario.

In absolute terms, the US represents the most significant spending loss in each scenario relative to the baseline.

Relative to the baseline, the most severe percentage impacts on spending are expected in European source markets due to conflict-related economic weakness.



In 2019, Alberta demonstrated strong growth potential by outpacing Canada's visitation growth from key international markets.

TOURISM IMPACT ON ALBERTA'S ECONOMY



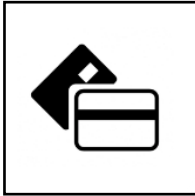
**28.4
Million**
Person-
Visits
(Albertans
travelling
within
Alberta)



**\$8.40
Billion**
Tourism
related
GDP in
Alberta



\$1.3 Billion
Tourism
related
taxes in
Alberta



4.5%
YoY
Tourism
Business
Growth
in
Alberta



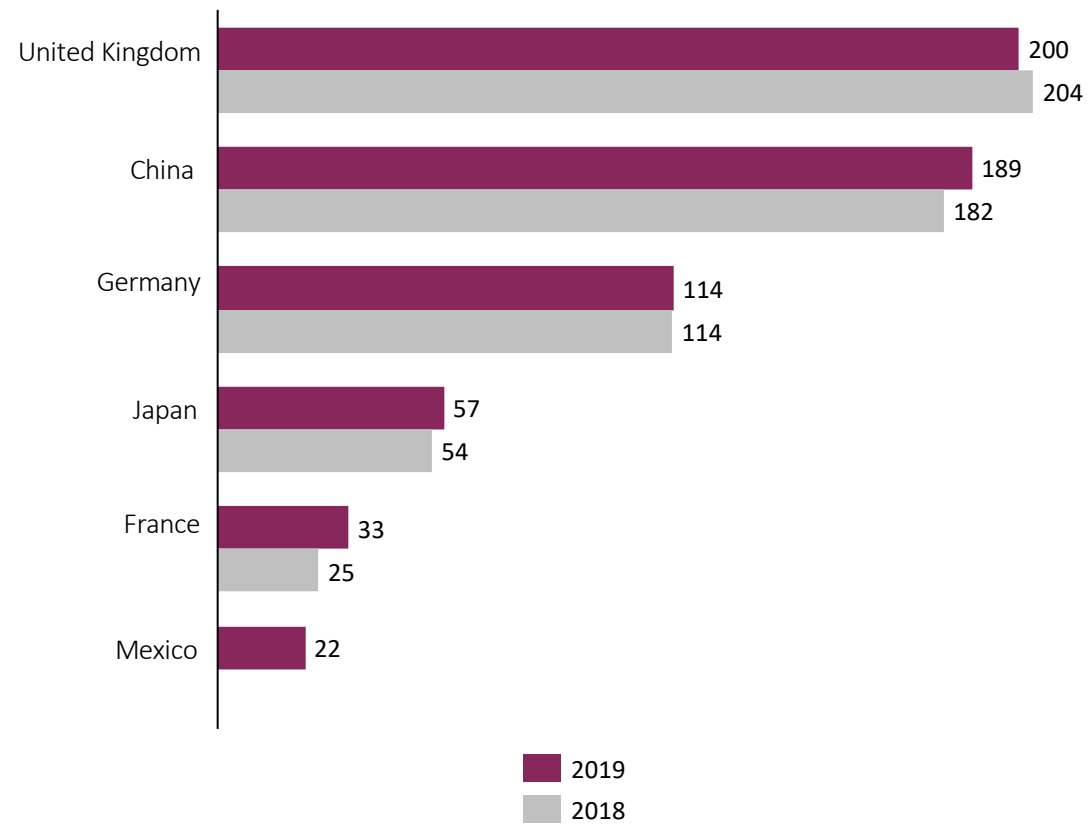
6.4%
in
YoY Tourism
Employment
Growth by
Province

KEY IMPLICATIONS

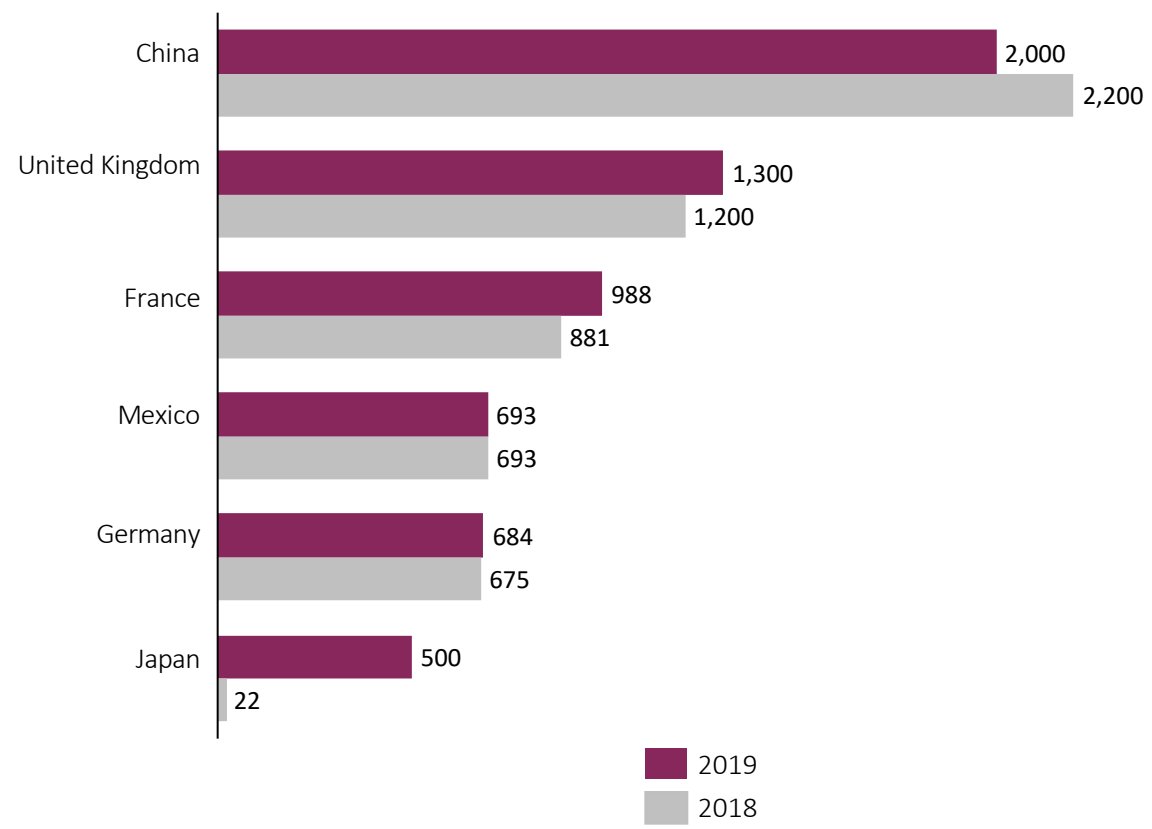
- Visitor spend in Alberta increased 1.7% in 2019, compared to the previous year – the result of a small domestic increase of 1% and moderate international growth of 4.2%.
- International visitation from target markets to Alberta grew by 9.4% year over year (YoY), 6.2 points ahead of Canada's international growth from the same markets. Alberta outpaced Canada's visitation growth from the US (11% vs 2%), Mexico (89% vs 13%), Japan (11% vs 6%), and France (44% vs 13%).
- Total visitation was relatively unchanged as the growth from the international markets was offset by a decline of 9,000 domestic visits. However, the international traveller spends on average four times more than the domestic traveller, so visitor spend was positively impacted.

Total tourism spend in Alberta was \$10.09 billion in 2019, with a 1.7% increase in visitor spend.

International Spend in Alberta (million)

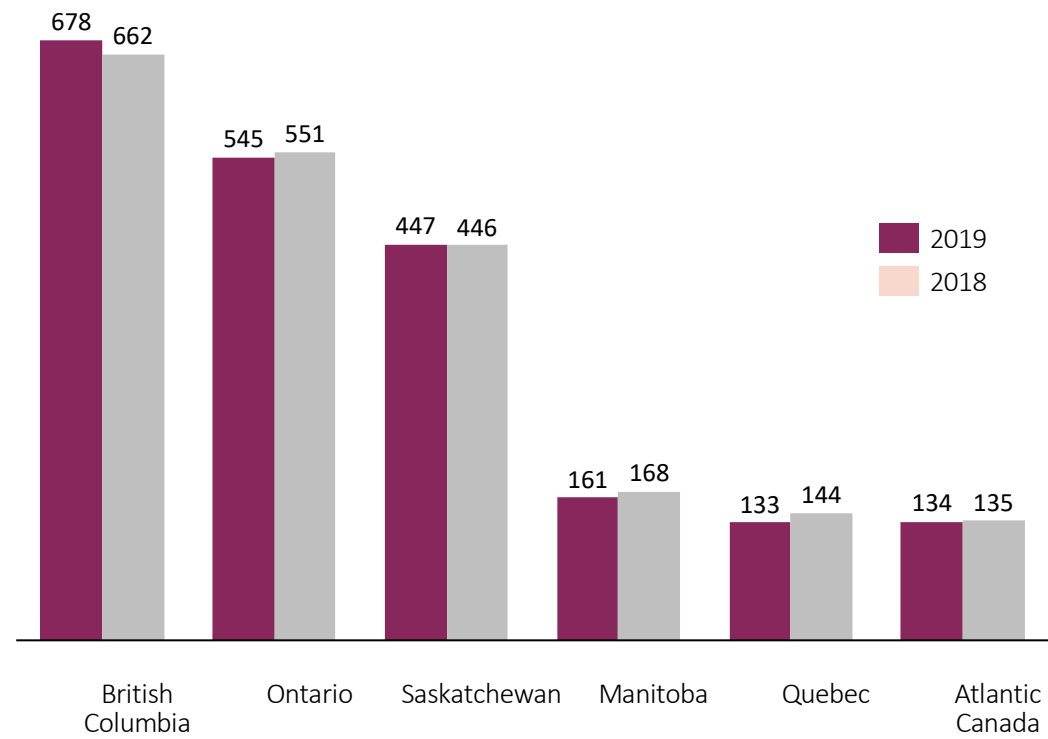


International Spend in Canada (million)

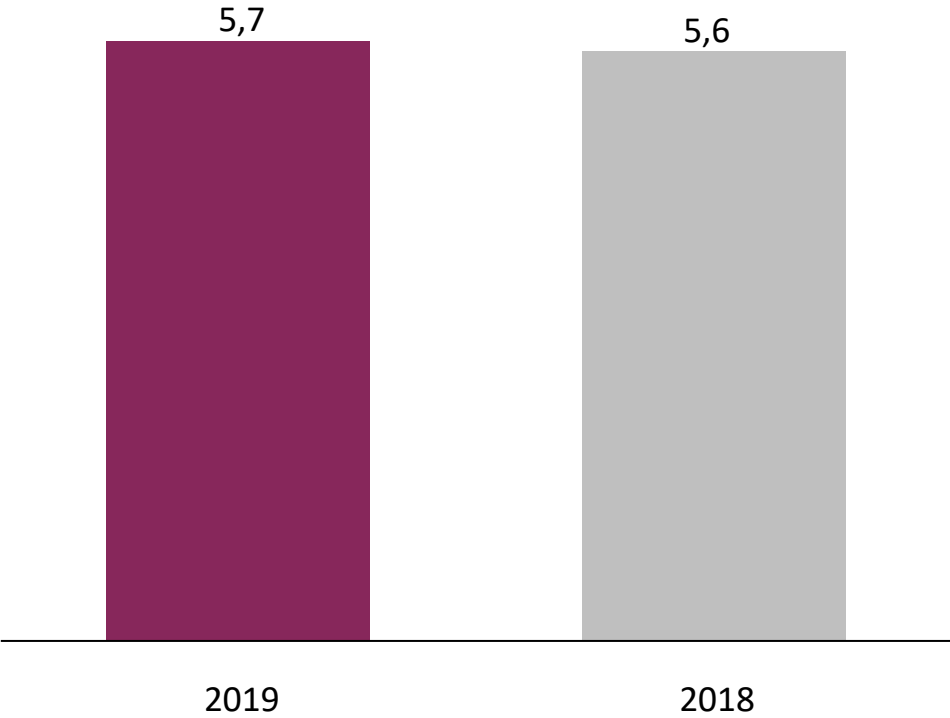


The domestic tourism spend in Alberta increased from \$5.6 billion in 2018, to \$5.7 billion in 2019.

Domestic Spend in Alberta (million)



Within Alberta Province Spend (billion)



LOCATION QUOTIENT FOR TOURISM INDUSTRIES

Drumheller and Starland County economies are more reliant on tourism jobs when compared to the economies of the rest of Alberta and Canada.

Industry (Drumheller & Starland County)	2021 Jobs	Provincial Location Quotient	National Location Quotient
Full-service restaurants and limited-service eating places	283	1.4	1.5
Traveller accommodation	72	2.0	2.5
Heritage institutions	54	10.4	9.8
Special food services	34	2.6	2.7
Recreational vehicle (RV) parks and recreational camps	23	9.7	7.1
Other amusement and recreation industries	22	0.7	0.7
Travel arrangement and reservation services	15	3.0	1.6
Scheduled air transportation	<10	0.9	0.1
Performing arts companies	<10	4.0	0.3
Spectator sports	<10	3.6	0.4
Independent artists, writers and performers	<10	0.2	0.0
Drinking places (alcoholic beverages)	<10	3.8	0.4

KEY IMPLICATIONS

- Full-service restaurants and limited service eating establishments form the most prominent sector of the industry creating almost 3 times more jobs than the second highest industry.
- Jobs within the heritage institutions sector are approximately 10 times more concentrated locally when compared to both provincial and national totals, speaking to the importance of that subsector. This can be attributed to Drumheller being a center of significance due to the paleontological research in the area.
- This is in addition to the historical relevance of the coal and agricultural industries which brought about the inception of the town.

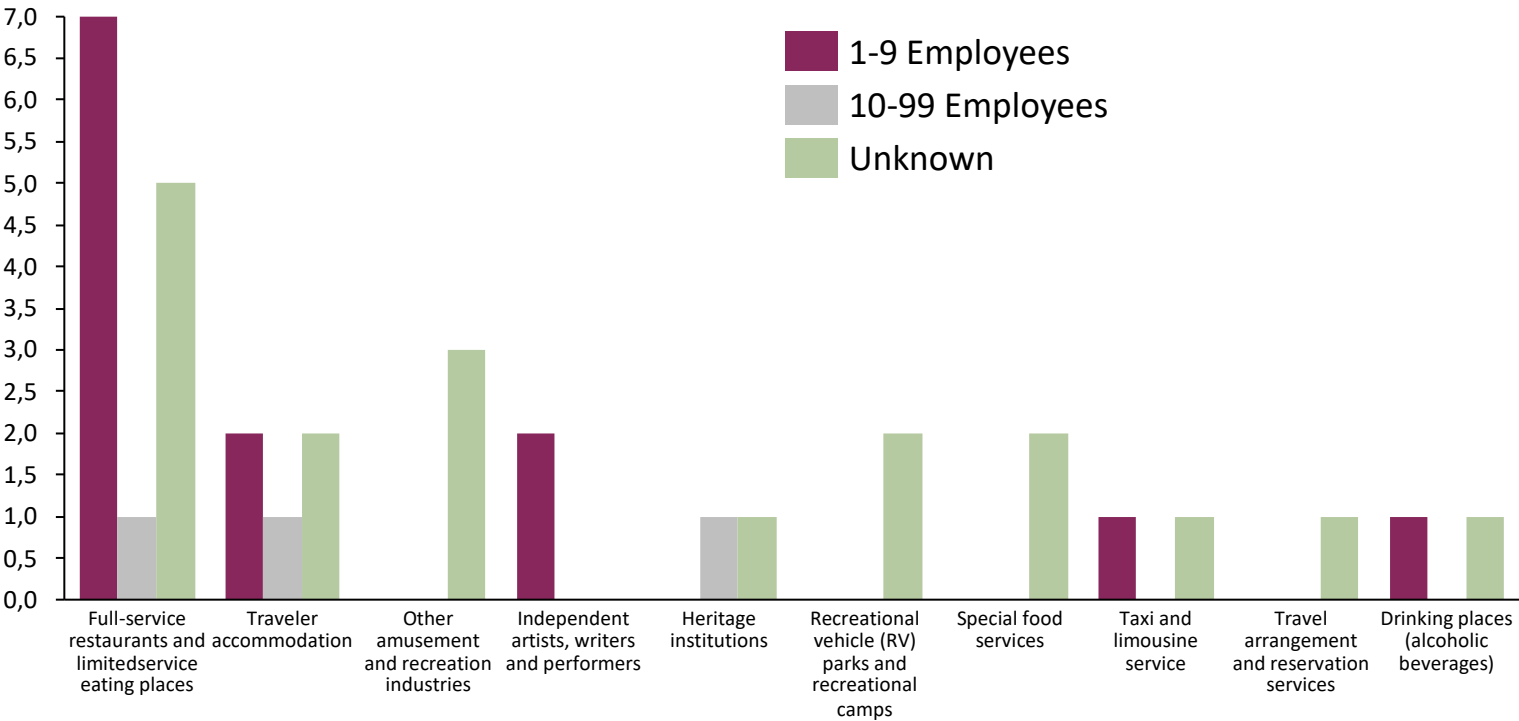
GLOBAL TRENDS

DOMESTIC TRENDS

LOCAL TRENDS

BUSINESS COUNTS BY TOURISM SUBSECTOR IN DRUMHELLER

Majority of Drumheller’s tourism sector is made up of small-to-medium sized businesses.



KEY IMPLICATIONS

- Of these businesses, 16 of them have unknown employment totals, while the majority of the rest are small businesses, with 1-9 employees.
- These businesses may not entirely depend upon tourists.
- Instead, they are considered to be at least somewhat impacted by tourism, as per Industry Canada’s definitions.

GLOBAL TRENDS

DOMESTIC TRENDS

LOCAL TRENDS

The Drumheller region provides a unique experience – captivating visitors with its breath-taking landscape, one of a kind attractions, and vast and expansive history.



VISITOR PERCEPTIONS: DRUMHELLER REGION ATTRACTIONS

Visitors are drawn to the region's Jurassic history, natural assets, hiking trails and overall charm.

Royal Tyrrell Museum



One of the most impressive collections of fossils in the world. Plaques are very informative. Cannot miss for dino lovers.

A must see Museum for anyone with an interest in the prehistoric world. Many interesting and well displayed items.

We love coming here. But it is hard to kill a full day here. So plan to go for a hike and look for dinosaur bones with the kids.

Busy museum. I wouldn't go again with small kids until they were older (6,4,3,1). Not much interactive stuff and once you are in the museum you seem to have no out until you are done. Which is hard for Whiney kids. Nice that kids 6 and under are free though.

No museum etiquette here.. completely overwhelming presence out of control kids Running wild everywhere ruined the experience. Control your children that get in for free!

I know everyone loves this museum and I was looking forward to my visit. However the organization was confusing and it was not easy to follow the chronological thread.

Horseshoe Canyon



Very Awesome Scenery, amazing Prehistoric formations. Hard to believe that this was once the shore of a huge ocean.

Horseshoe Canyon has some historical significance to the area and some awesome views for taking photographs. It was definitely worth seeing and we would go back and also visit other locations n the Drumheller area.

What a view! It really does not feel that we were in Alberta....it really felt that we were somewhere south and to think that dinosaurs roamed the lands is incredible.

This is a great place to go, but accessibility for older travellers or younger travellers is an issue. Steep climb down and up, but there is just a lookout at the top with tons of sweet prairie dogs if the view is all you are after. I think a worthwhile place to go for better exposures (fossils, etc.) but don't go if it has rained the day before as it can be treacherously slick!

Stopped in to take a look. Not a lot to see. There is a little valley to look at. Maybe to do a bit of hiking. This is a free site.

The trail to the lookout is under construction and a complete mess and nothing but mud hole. Always so windy.

Rosedale Suspension Bridge



It's an impressive bridge and not for those without a head for heights. The scenery that surrounds it is somewhat interesting. It's not a must-see attraction but worth a visit, especially as it's free and right by the road.

We stopped at the suspension bridge on the way back to downtown after visiting the Hoodoos. It's free and quick, worth the stop, a short walk across the river on the old bridge followed by a short walking trail on the other side of you choose.

You can make this a quick side trip while on your Drumheller adventure. You can walk across the suspension bridge to check out some of the old structures they used for mining back in the day. It doesn't take long to explore the area but it is fun to see.

Nice stop minutes from the Hoodoos. Only takes a few minutes but a fun experience. Great photo op as well

It is still closed (2 years now) - waiting for "indigenous consultations". So likely a long wait. We were hoping to visit with grandchildren. It is a great attraction. Hope it can reopen.

We went here and we were able to see the bridge but not walk across it as it's closed for the season due to structural issues.

World's Largest Dinosaur



Definite hallmark and selfie spot in Drumheller. The town is a bit quirky with dino burgers, dino fire fighters and such but this is the main star

Great visit to the information centre and a visit inside the largest dinosaur. Lots of leaflets and information and helpful staff. They provide a map of the area which was handy.

I mean there is not much to do in Drumheller and you drive by it on the way to the museum so we have decided to make it a tradition and the kids really enjoy it. It's super high up so fun to look out.

This is a fun thing to do once you see the Royal Tyrrell Museum. Climb the stairs and enjoy the view. You will be done within 10 minutes, but the price is good.

I mean this in the nicest possible way, but Drumheller really is a s**t hole. Come here for the museum and to see the badlands, but stay away from the town; its practically deserted and feels like time has passed it by. Such a shame. if anyone had some imagination, Drumheller could be a really nice four season resort. Excellent sightseeing, hiking, mountain biking, etc., it could draw people from around North America. The town should be buzzing with coffee shops, cafes, live music, etc. but its dead and depressing and appears to be extremely deprived.

Horseshoe Canyon



This canyon is amazing and really worth the visit. Be warned it gets very hot out there in the badlands. Some amazing plant and animal life and of course...fossils. A fun landscape to explore.

The place is nice and educational. It is peaceful. A wonderful place to go and observe nature.

This was honestly the best thing in the area. Much more interesting than Drumheller itself! There's a trail down into the canyon, beautiful badlands landscapes, and VERY FEW tourists. We live in the GTA and were laughing because if this were anywhere near TO, there would be hordes of tourists! If you weren't looking for it, you would drive right past, there's nothing to indicate there is a canyon there. Definitely recommend. Kids would love climbing.

Great place for a short stop to take in some views from above the canyon. You can also make it a day trip hiking down through the canyon and enjoying a picnic.

In yet another silly grab for money, the local county is charging \$2 for parking. Because of all the heavy construction equipment in the area, there was no where else to park to access public lands. What a waste of time!

VISITOR PERCEPTIONS: DRUMHELLER ATTRACTIONS

Most visitors to the region have families and young children.

Atlas Coal Mine National Historic Site



Great site, great history, did the mine portal tour, Sarah was a great host for the tour. Great historical experience, scenery there and around is amazing. Learned a ton about the area, the miners, the history. Highly recommend.

Really worth the drive! Definitely spring for the extra tours - the guides are friendly and knowledgeable plus you get access to restricted parts of the mine versus just the general admission.

It is a fun place to visit and you get to learn some history of Drumheller. There are different tours you can take to get different experiences and they have different levels of intensity.

I have been to Drumheller at least a half dozen times but never went to this attraction before. It's interesting for all members of the family, adult and youngsters alike. There's old mining machinery, access to the old coal mine, miner shacks etc. The gift shop sells ice cream and drinks - perfect on hot days. There are tours on an hourly basis. Worth a trip for sure.

The Atlas coal mine is not really a big deal. We didn't have a memorable time there. If you are in a rush, feel free to skip it.

Badlands Amphitheatre



We went to the Badlands Amphitheatre finally after trying to go for four years! One year cancelled because of rain and another two cancelled because of Covid. I guess you could say it was worth the wait. The actors were great and the whole experience was certainly worth the visit.

This play was a much higher caliber event than I expected. One of the best plays I have ever attended. Highly recommend.

We finally made it this year after trying for several years. It was really worth it, a surreal experience! So well performed and organized! In one word: BREATHTAKING!

A must see! The cast does a wonderful job at presenting the life of Christ with his disciples. A beautiful setting. Well run, clean, the food was good.

The setting is dramatic, set in a canyon near Drumheller with the stage occupying the entrance to the canyon consisting of buildings representing Palestine at that time. The actors are for the most part locals and in the first hour or so, it seemed to me as though I had stumbled into a school play - the acting was amateurish and the pace too slow. However, during the second half the pace picked up and the acting improved markedly and suddenly I was no longer aware of the uncomfortable bench seats.

Bleriot Ferry



We enjoyed our little trip across the Red Deer River on this ferry. Smooth sailing, nice view. Felt very safe.

This is well worth the small detour required to find the Bleriot Ferry. Take note though, of the dates when this ferry operates as it is seasonal only.

The drive through the area is beautiful. The ferry is small and takes only a few minutes one way, but worth the time

I am just happy that we went thru it so that we can check it off. However, I felt that they was not anything special to justify a on-purpose trip to visit this attraction.

It's a raft with a rope. Move along people, nothing to see here. I guess its kinda old. If that interests you, go nuts.

Why is this a tourist attraction? It's a way to cross the river without going into town... Anyways, my friend wanted to go... It's a motorized plank of wood that cars drive onto. It barely feels like it's moving and then you drive off on the other side. Voila.

Drumheller's Little Church



I made my family stop here for a few minutes as we were on that highway and it was an adorable little church. It was neat to see and to appreciate the space.

This little church always amazes. Built by the local ministerial association, there is room for a congregation of 6 and a pulpit

This was a novelty stop for the family. We noticed the parking lot was empty so we pulled over to have a peak. It is what it is, a small church!

We've stopped here a few times now, it's always such a nice place to get out and stretch, walk the dogs, and check out the tiny little church. Very picturesque!

Nothing looks old. Newish asphalt roof, laminate floors. If small is your thing you will be in heaven. Looks like someone is trying to hard for a tourist attraction. Doesn't fit with dinosaurs or miners or older historical folklore of the area.

Nothing looks old. Newish asphalt roof, laminate floors. If small is your thing you will be in heaven. Looks like someone is trying to hard for a tourist attraction. Doesn't fit with dinosaurs or miners or older historical folklore of the area.

Orkney View Point



The view from here is AMAZING! There are hiking trails all over but make sure you wear sturdy shoes. It's worth while to flip to the Horse Thief canyon to see the river from the other side. It was really windy so dress for the weather. Has washrooms on site.

What a majestic view point to catch the fall colors with all the trees showing their full fall palate of colors. The valley and river add contrast to the trees in all their glory.

Was more than pleasantly surprised. Was driving along the dinosaur trail and stopped in to check it out. On a sunny day one could sit on a bench and take in the view

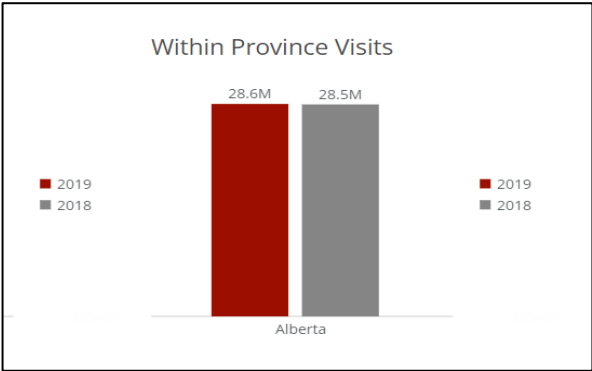
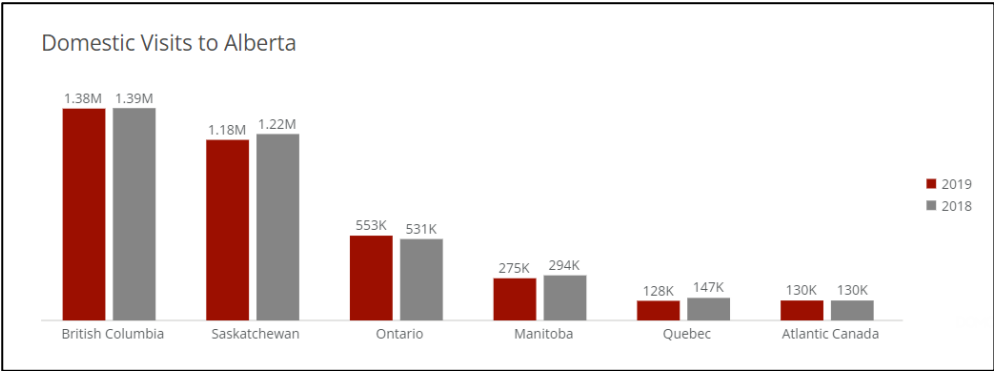
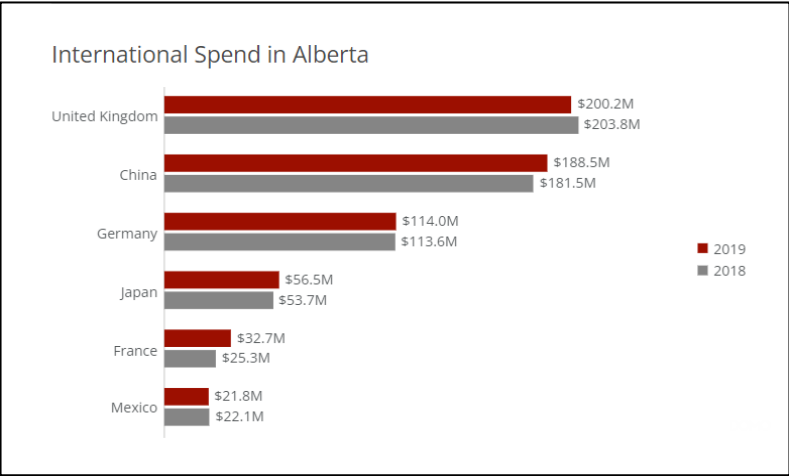
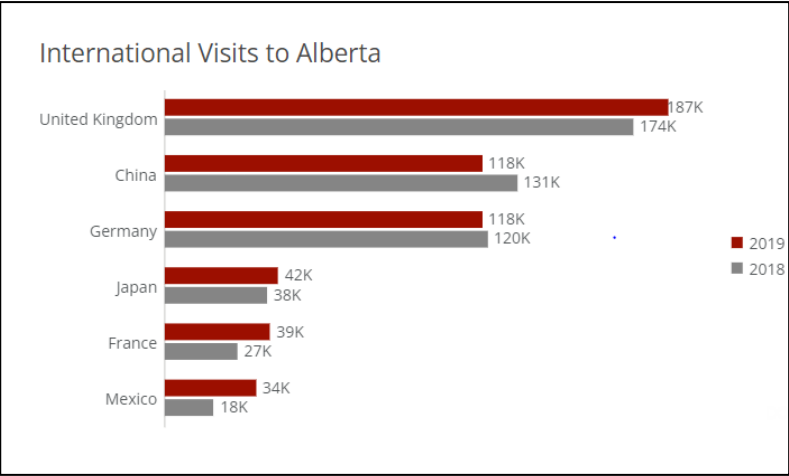
Best place to stop on the Dinosaur Trail. The view of the valley and the Badlands is incredible. The fall colours in the valley were incredible.

This spot was great to check out the landscape. The different coloured layer hills was spectacular. Just only one sign so keep an eye out!

Stopped here while travelling from Three Hills to Drumheller on the scenic route. The views are really good giving you a sense of the scale of the canyon and the land formations.

VISITOR ORIGIN: ALBERTA

Alberta maintains strong international and rest-of-Canada visitation however, the province continues to be primarily supported by it’s Alberta-based domestic market.







KEY IMPLICATIONS

- The majority of international visitors to Alberta are from the United Kingdom.
- Approximately 187 000 visitors travelled to Alberta in 2019.
- The majority of domestic visitors to Alberta (outside of Albertans) are from British Columbia. Approximately 1.38 million domestic visitors travelled to Alberta in 2019.
- 28.6 million Alberta locals travelled within the Alberta province in 2019.

Travel to Alberta is predominantly motivated by visiting friends and family and pleasure trips.

Main Trip Purpose (overnight visits)

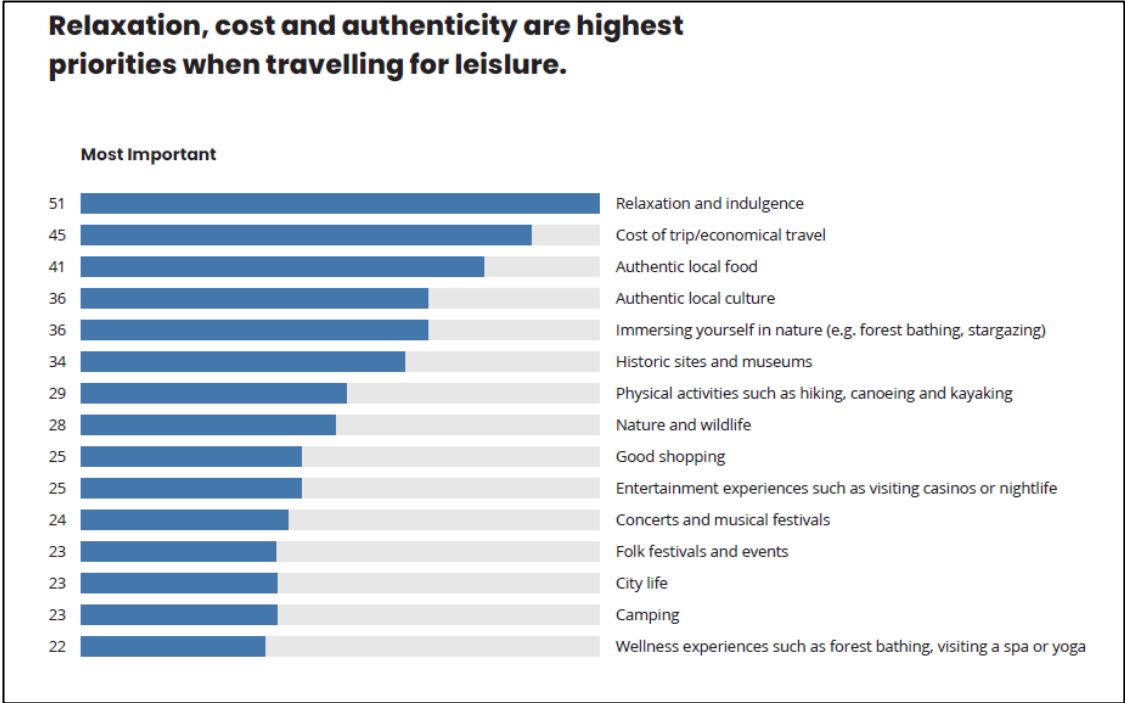
		Alberta	Other Canada	U.S.	Overseas	Total
	Visiting friends/relatives	40%	51%	27%	32%	40%
	Pleasure	42%	29%	43%	55%	41%
	Business	10%	14%	22%	7%	12%
	Other	7%	6%	8%	6%	7%

Source:
1) <https://open.alberta.ca/dataset/475d13af-5518-40bb-b0be-355fa43f3b79/resource/81ebafbc-2801-4a97-81fd-42f9695ed126/download/jei-tourism-in-alberta-total-alberta-2019.pdf>
2) Benchmarking Canadian Traveller Perceptions of Domestic Travel Destinations and Experiences Report

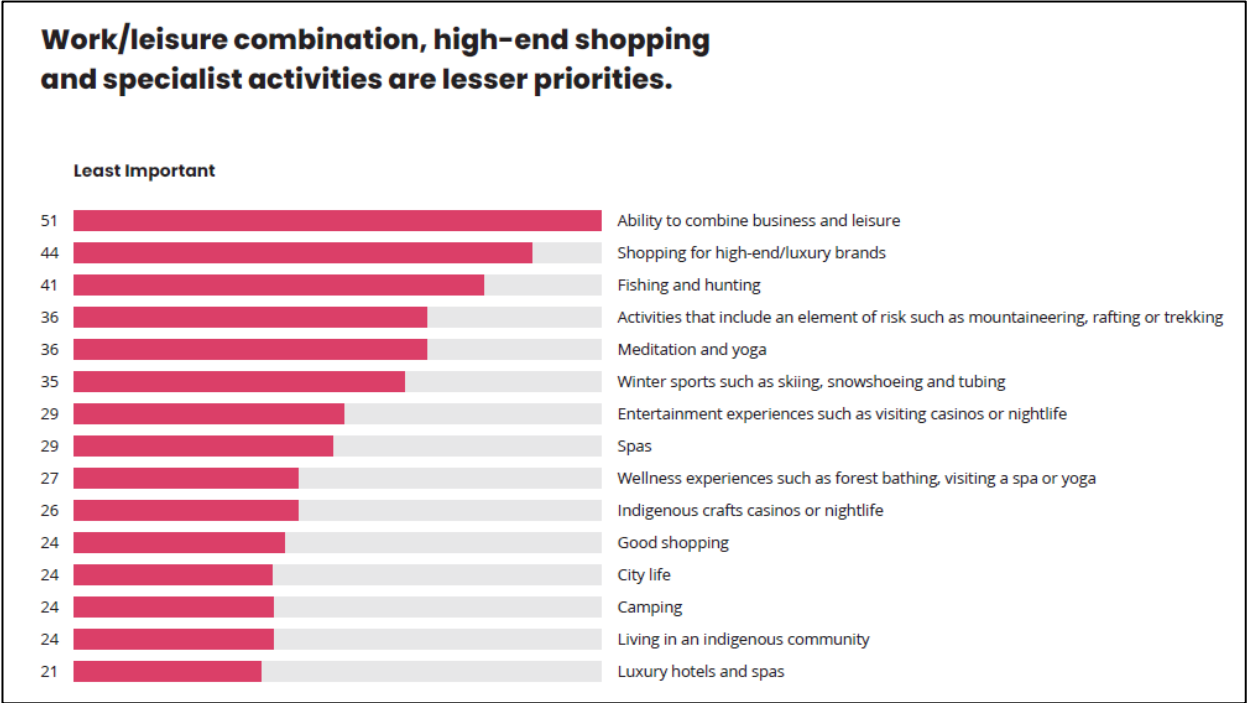
DEMAND DRIVERS: TRIP PURPOSE

Relaxation, cost, and authenticity are top priorities for domestic visitors when travelling for leisure.

Top Priorities for Domestic Visitors

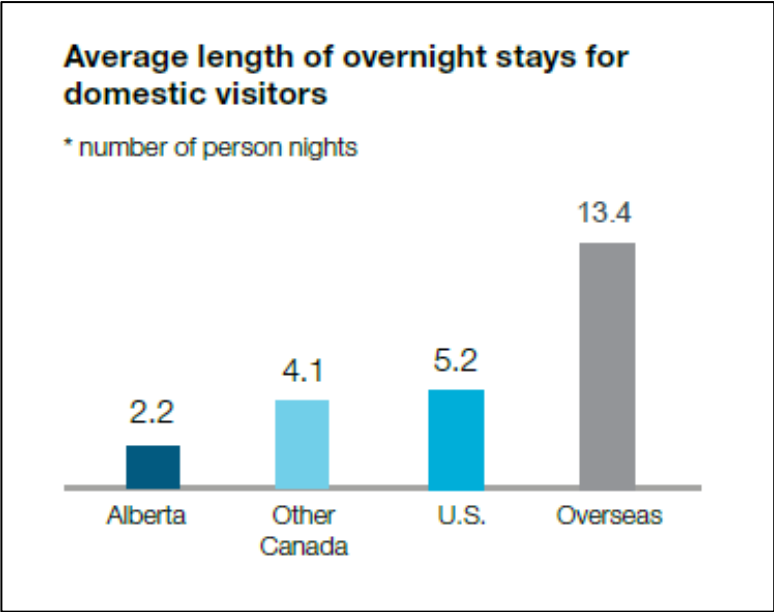
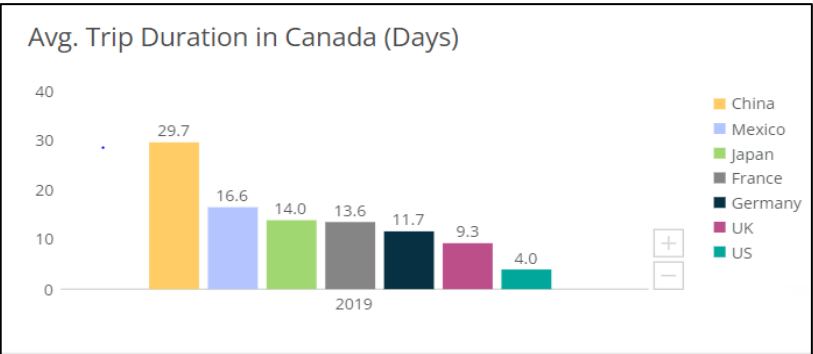
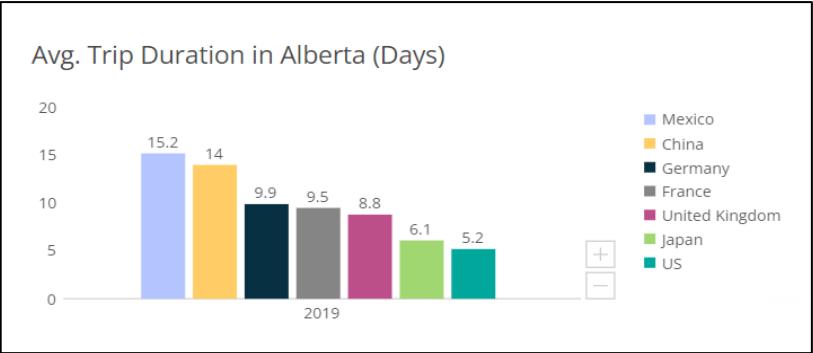


Lesser Priorities for Domestic Visitors



DEMAND DRIVERS: LENGTH OF STAY

Overseas visitors spend an average of 13.4 nights in Alberta, compared to 5.2 nights from US visitors.



KEY IMPLICATIONS

- The average length of stay for international visitors to Alberta was 14 days in 2019. This corresponds with the average trip duration of visitors travelling to Canada.
- Mexico is Alberta’s smallest source market, however on average, Mexicans spend the most time in Alberta.
- The average length of time that domestic visitors spend in Alberta is 6.3 person nights.

Curious Adventurers and Hotspot Hunters are the two primary types of high-value personas that visit Alberta.

CURIOUS ADVENTURERS

For Curious Adventurers, travel is about getting a different perspective on the world. They're energized by exploring new places and inspired to learn all they can about a destination through its landscapes, authentic culture and the people they meet. Spontaneous and open-minded, they're fuelled by a sense of adventure and discovery, knowing that organic moments can provide their best experiences. They are thoughtful planners, investing time before their trip to help forge deeper connections with a place.

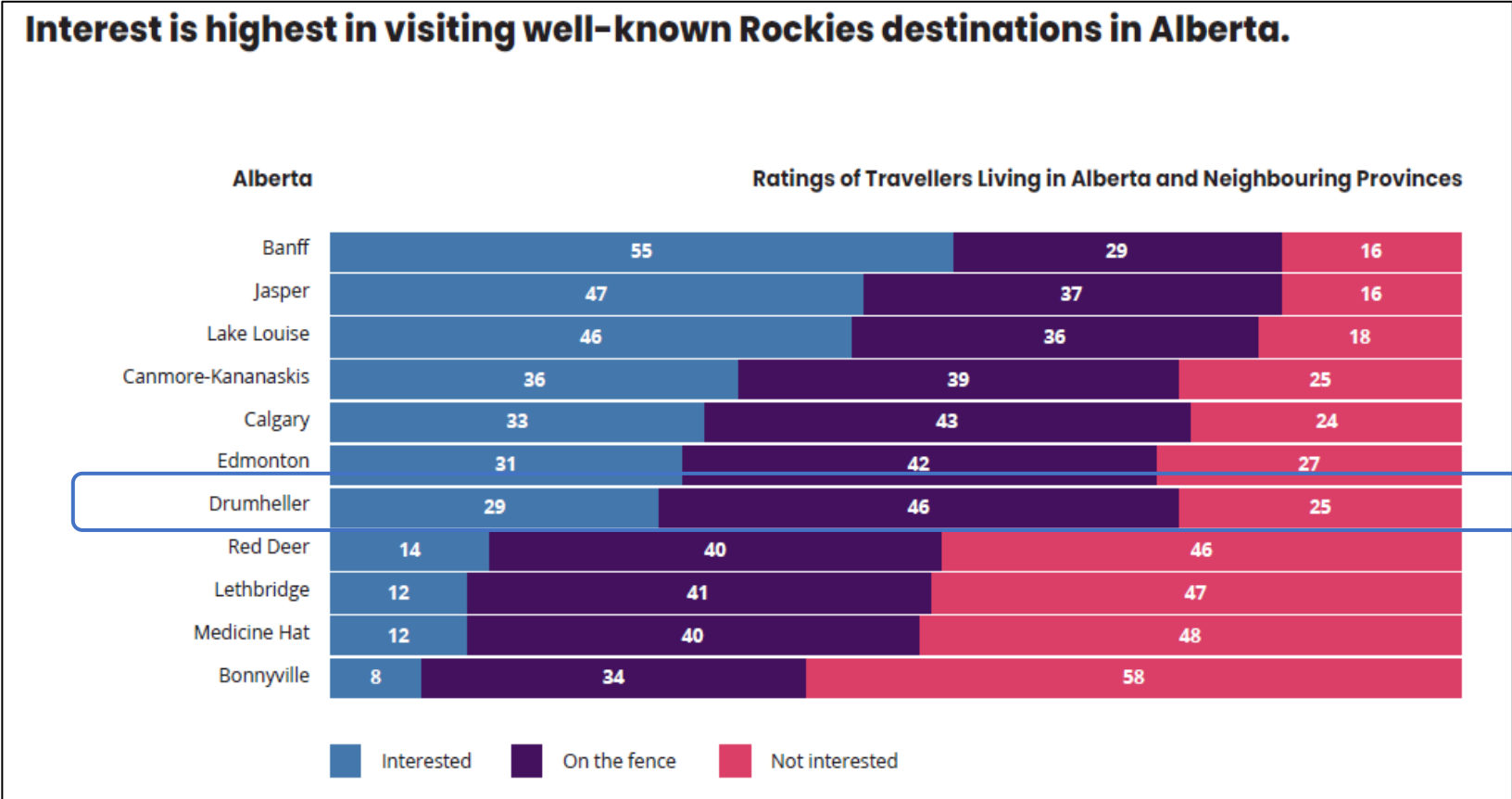
- Age: 40 – 55
- Gender: Equal
- Alberta Interests: Mountains, Cities, Rural, Open to all seasons, but most interested in summer
- Lifestyle:
 - Look for opportunities to learn.
 - Spend more on outdoor excursions, home entertainment and technology.
- Markets: Alberta, Canada, US, UK, Germany, Japan
- Research: Experiential
- Scheduling: Allowing space
- Local Experiences: Organic
- Media Habits: Heavy social media users, but don't post regularly. Avid listeners of podcasts and music streaming sites, and regular blog readers.
- Actively avoid advertising on social.

HOTSPOT HUNTERS

For Hotspot Hunters, travel is about achievement and accomplishment. They want to visit the top attractions, take part in one-of-a-kind experiences and connect with local experts. They're driven to make the most of every minute, to fill their trips with as many stories and memories as possible – and they plan accordingly, leaving little to chance and deprioritizing sleep.

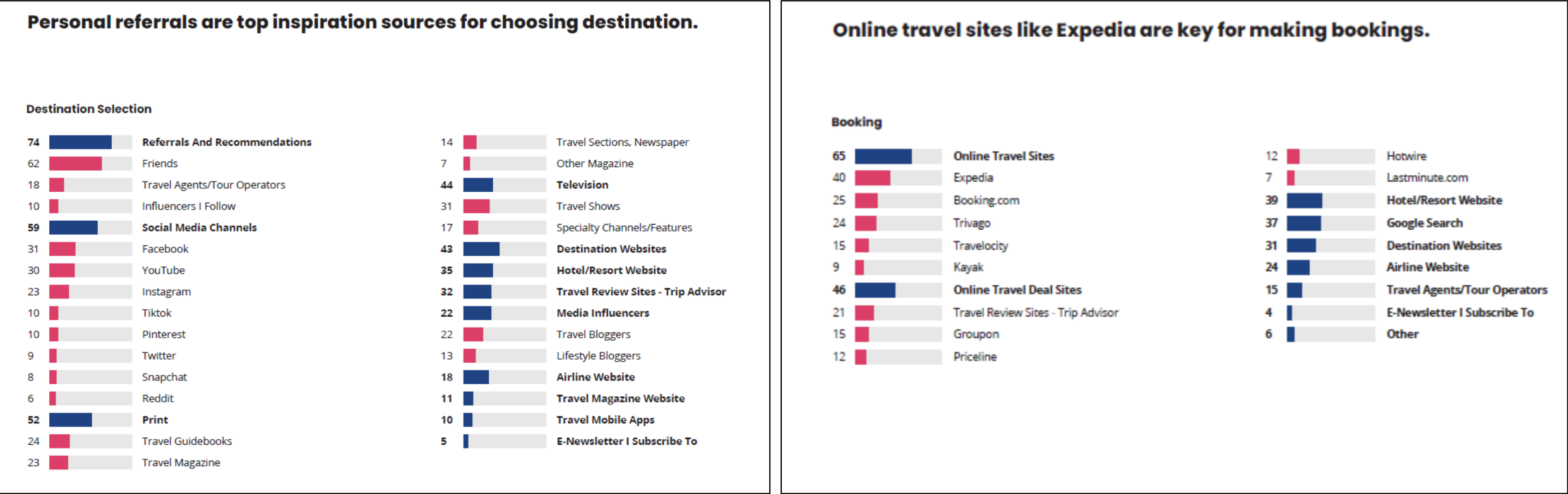
- Age: 30 - 45
- Gender: Female - led
- Alberta Interests: Mountains, Cities, Open to all seasons, but more open to winter than Curious Adventurers
- Lifestyle:
 - Sports fans and avid investors.
 - Spend more on high-profile activities such as live concerts, museums and sporting events.
- Markets: Alberta, Canada, US, UK, Mexico, China
- Research: Logistical
- Scheduling: Tightly Planned
- Local Experiences: Curated
- Media Habits: Heavy social media users, particularly Instagram and LinkedIn, posting and engaging regularly. More receptive to advertising on social.

An opportunity exists to increase interest for visitors living in Alberta and neighbouring provinces.



PRIMARY TOURISM CHANNELS

Personal referrals, social media, and print are the primary sources of inspiration for domestic travellers while online travel sites are favoured by domestic visitors for making bookings.

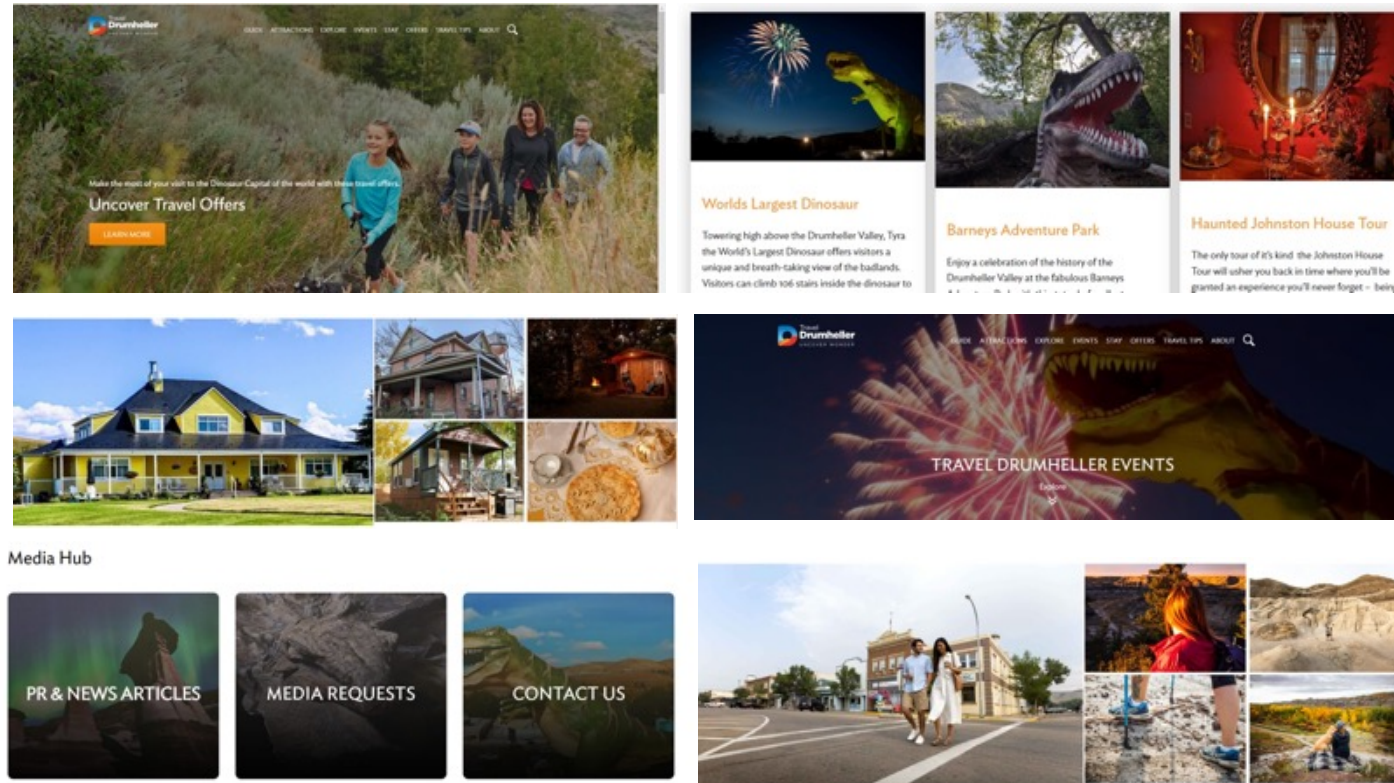


The Travel Drumheller brand is centred around dinosaurs, palaeontology, and unique natural assets.



TRAVEL DRUMHELLER WEBSITE

The Travel Drumheller website reflects a consistent brand message for visitors.

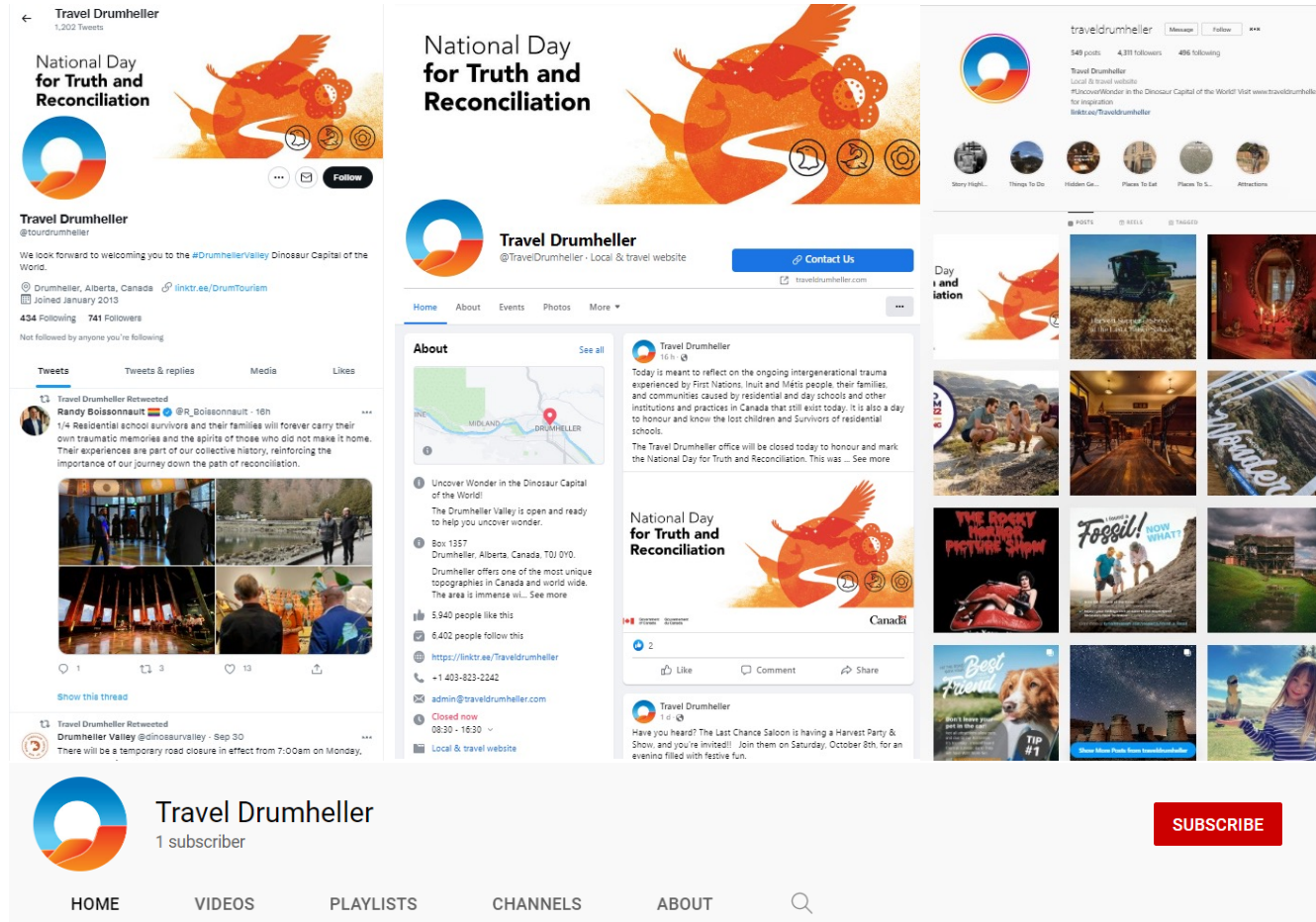


KEY IMPLICATIONS

- The Travel Drumheller website positions Drumheller as a region with plenty to offer visitors – amusement parks, dinosaur adventures, museums and historic sites, natural attractions, performing arts, sports, and recreation.
- The website provides visitors useful resources such as travel tips, an events calendar, hiking trail maps, travel itineraries and links to guided tours and accommodations in Drumheller.
- The website utilizes imagery of dinosaurs, Drumheller, regional hot spots, and natural attractions to show visitors what the region has on offer.

VISIT DRUMHELLER SOCIAL MEDIA PAGES

Instagram and Twitter are Travel Drumheller's strongest performing social channels.



KEY IMPLICATIONS

- Travel Drumheller utilizes 4 main social channels: Twitter, Facebook, Instagram and YouTube – all aligned with the brand and driving traffic to the website.
- Instagram and Twitter are the strongest channels with respect to reach:
 - Instagram: 4 311 followers
 - Twitter: 741 followers
- All the channels are consistent from a brand perspective. The content on these channels showcases regional attractions and events occurring in the town.
- Instagram, Twitter, and Facebook have the most regularly updated content (multiple times per week).
- YouTube appears to be not an active platform for Travel Drumheller and may serve as a host for digital content. Review of the channel may be required.

PEER DESTINATION: TUMBLER RIDGE, BC

Tumbler Ridge is known for dinosaurs and fossils and is positioned as the ultimate destination for outdoor enthusiasts and adventurers.



KEY IMPLICATIONS

- Tumbler Ridge is a town in British Columbia (BC) known for dinosaur footprints and fossils. It is home to BC's first dinosaur bone beds.
- On its official website, Tumbler Ridge is positioned as a dream destination for outdoors enthusiasts with a full range of adventures: from high-energy to easygoing. Tumbler Ridge is home to accessible year-round recreational opportunities for all ages, interests and abilities. The possibilities are as diverse as the landscapes in which they appear.
- Top attractions in Tumbler Ridge include the Geopark, Dinosaur Discovery Gallery, and the Community Centre.
- The Town is focussing substantial resources to expanding their tourism industry sustainably, and is developing tools and resources to support those interested in either working from Tumbler Ridge or that want to start their own tourism business locally.

PEER DESTINATION: DINOSAUR NATIONAL MONUMENT

The Dinosaur National Monument is a dinosaur attraction situated in the border between Colorado and Utah and is positioned to attract adventure enthusiasts.



KEY IMPLICATIONS

- The Dinosaur National Monument is located in the Uinta Mountains, on the border between Colorado and Utah.
- Visitors can see over 1,500 dinosaur fossils exposed on the cliff face inside the Quarry Exhibit Hall.
- It is also positioned as the ideal travel destination for adventure enthusiasts. The monument has river rafting, camping, hiking trails, and petroglyphs on offer.
- The park's vision is to serve as a preeminent resource laboratory by applying excellence in science and scholarship to understand and respond to environmental changes.
- It also aims to encourage children to be future conservationists by expanding partnerships with schools and boys' and girls' associations to show how national park experiences can improve children's lives.
- The Dinosaur National Monument aims to demonstrate environmental excellence through increased use of alternative energy and fuels at every park.

PEER DESTINATION: THE CRADLE OF HUMANKIND

The Cradle of Humankind is a paleontological site in South Africa with the largest concentration of human ancestral remains in the world.



KEY IMPLICATIONS

- The Cradle of Humankind is a UNESCO World Heritage site situated in the Gauteng province of South Africa. It is home to the largest concentration of human ancestral remains anywhere in the world.
- The Cradle of Humankind offers archeological tours, venue hiring and conferencing facilities, and activities such as abseiling, quad biking, caving, and hot-air ballooning.
- The exhibition centre takes visitors on a journey of discovery to learn more about the origins of humankind. The site also aims to inspire visitors to be more aware of threats to the environment. The sustainability wall, which runs across the main exhibition room, highlights important facts about modern humans and our consumption of rapidly decreasing natural resources.
- Maropeng provides visitors with a rare opportunity to view original hominid and dinosaur fossils, as well as ancient artefacts housed in the fossil display room.

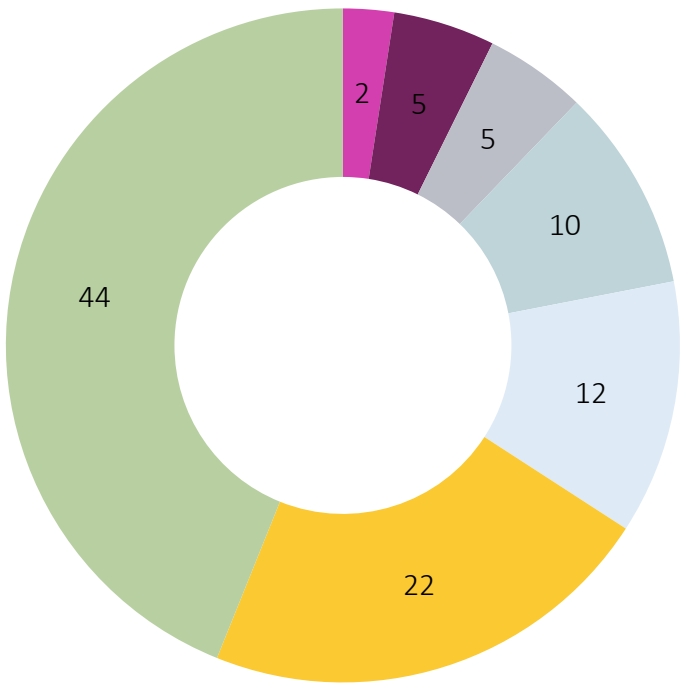


APPENDIX C: TOURISM STAKEHOLDER SURVEY TOPLINE RESULTS

Travel Drumheller administered an online survey among 41 Stakeholders; the largest plurality of stakeholders are private sector businesses; most stakeholders reside outside Drumheller and have 5+ years of experience.

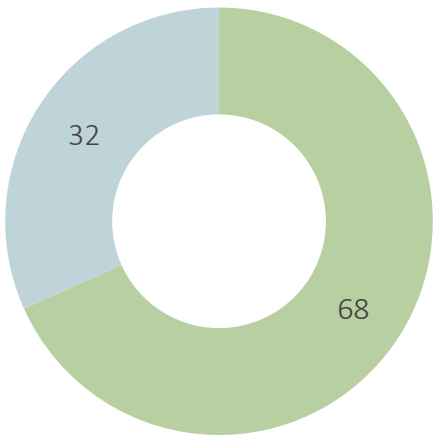
Respondents by Organization

- Indigenous Organization
- Municipal Government (Elected)
- NGO)/Community Advocacy Group
- Municipal Government (Non-Elected)
- Private Sector Business (Non Travel and Tourism)
- Private Sector Business (Travel and Tourism)
- Other



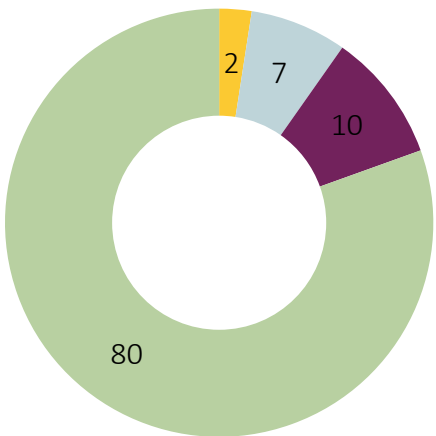
Residence of Respondents

- I reside in the Town of Drumheller
- I reside outside of the Town of Drumheller



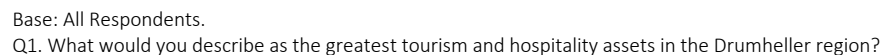
Years of Service

- Less than 1 year
- 1 to 2 years
- 2 to 5 years
- More than 5 years

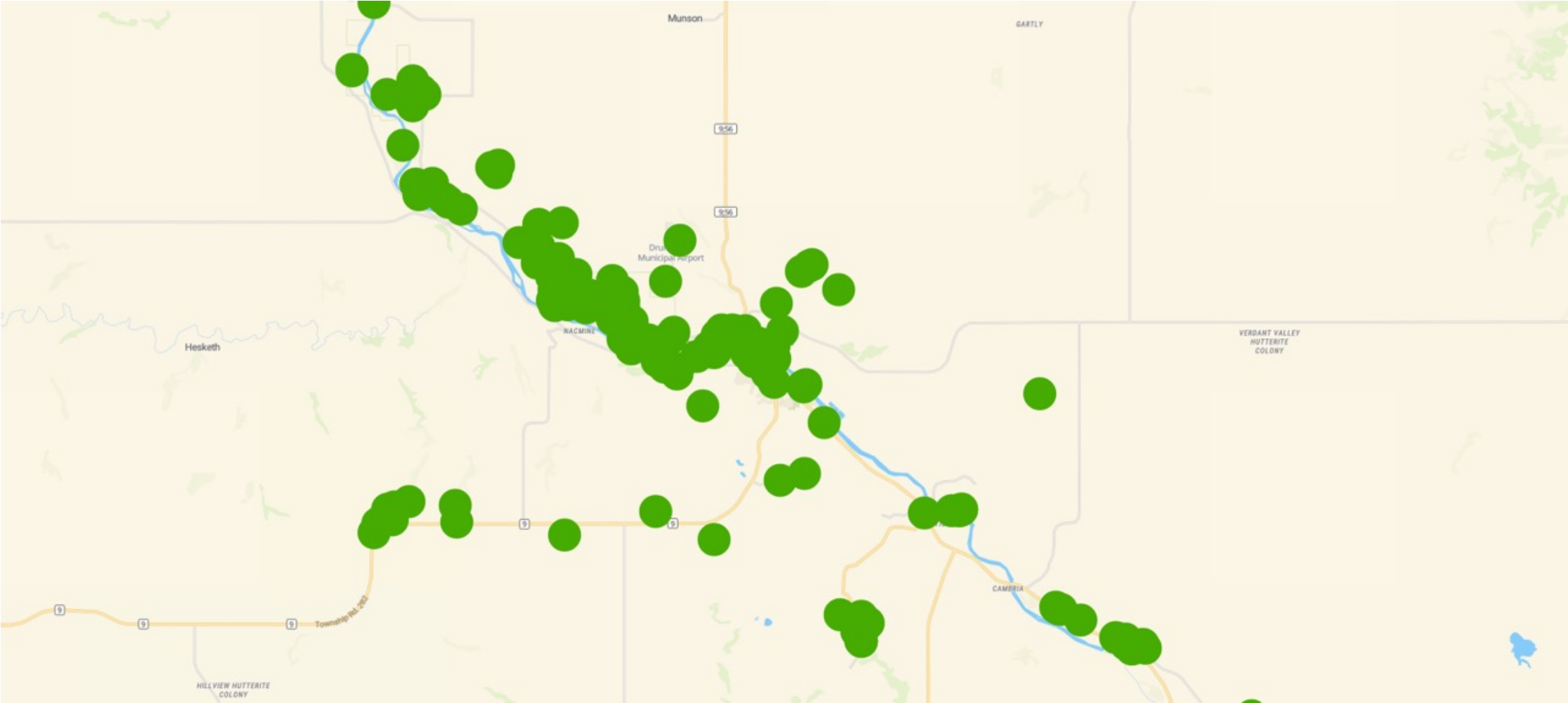


Base: All Respondents (41).
Q13. What best describes the sort of organization you represent?
Q14. Please indicate if you reside in the Town of Drumheller, or outside of Drumheller in the surrounding region.
Q15. How long have you been involved or engaged in the tourism and hospitality industry/economy in the region?

t.31

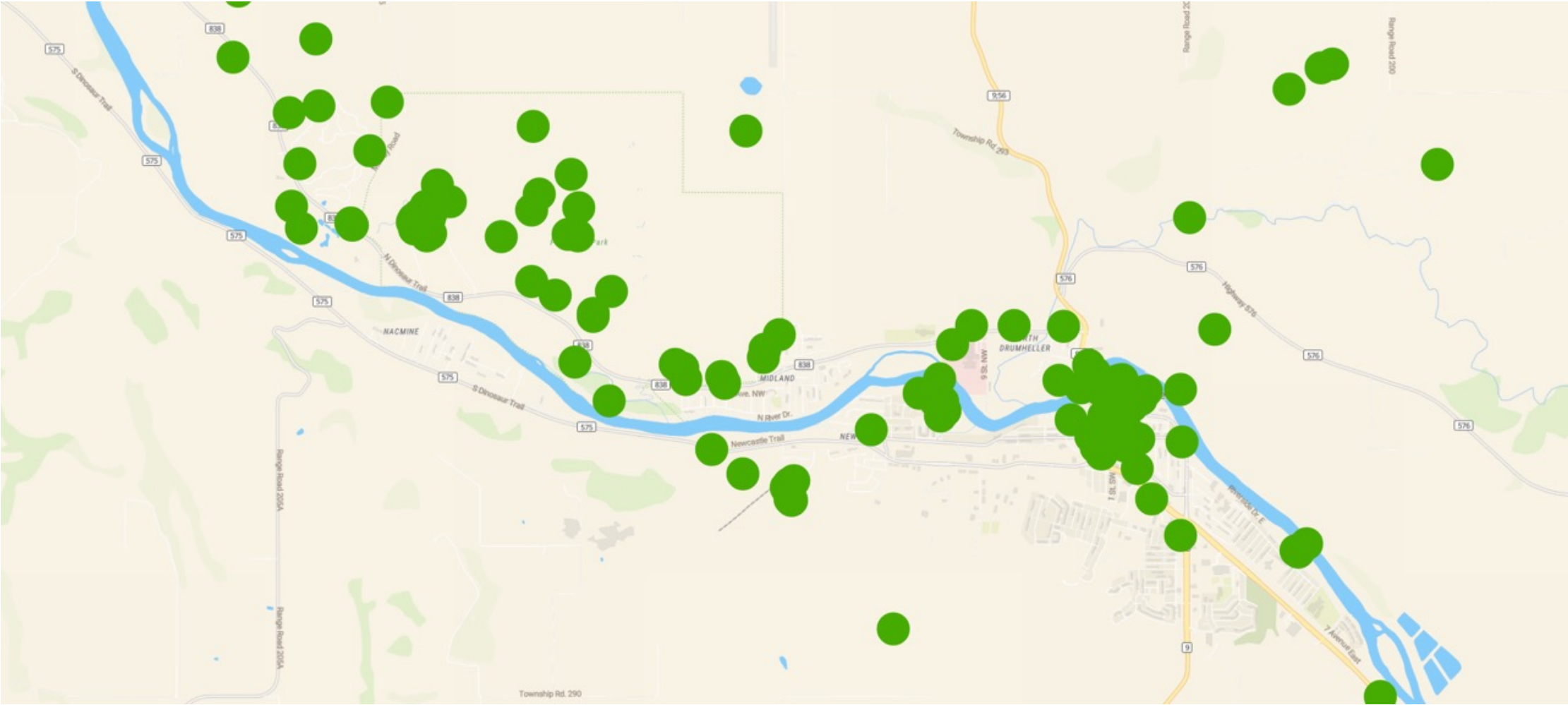


Stakeholders recognize tourism and hospitality assets all throughout the region (part 1).



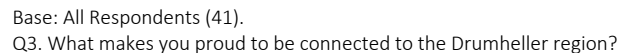
Base: All Respondents. (41)
Q2. n the map of the Drumheller region below, please indicate where the destination's greatest tourism and hospitality assets are that you mentioned in the previous question. Please click on the corresponding marker and highlight areas directly on the map where theses assets are located.

Stakeholders recognize tourism and hospitality assets all throughout the region (part 2).

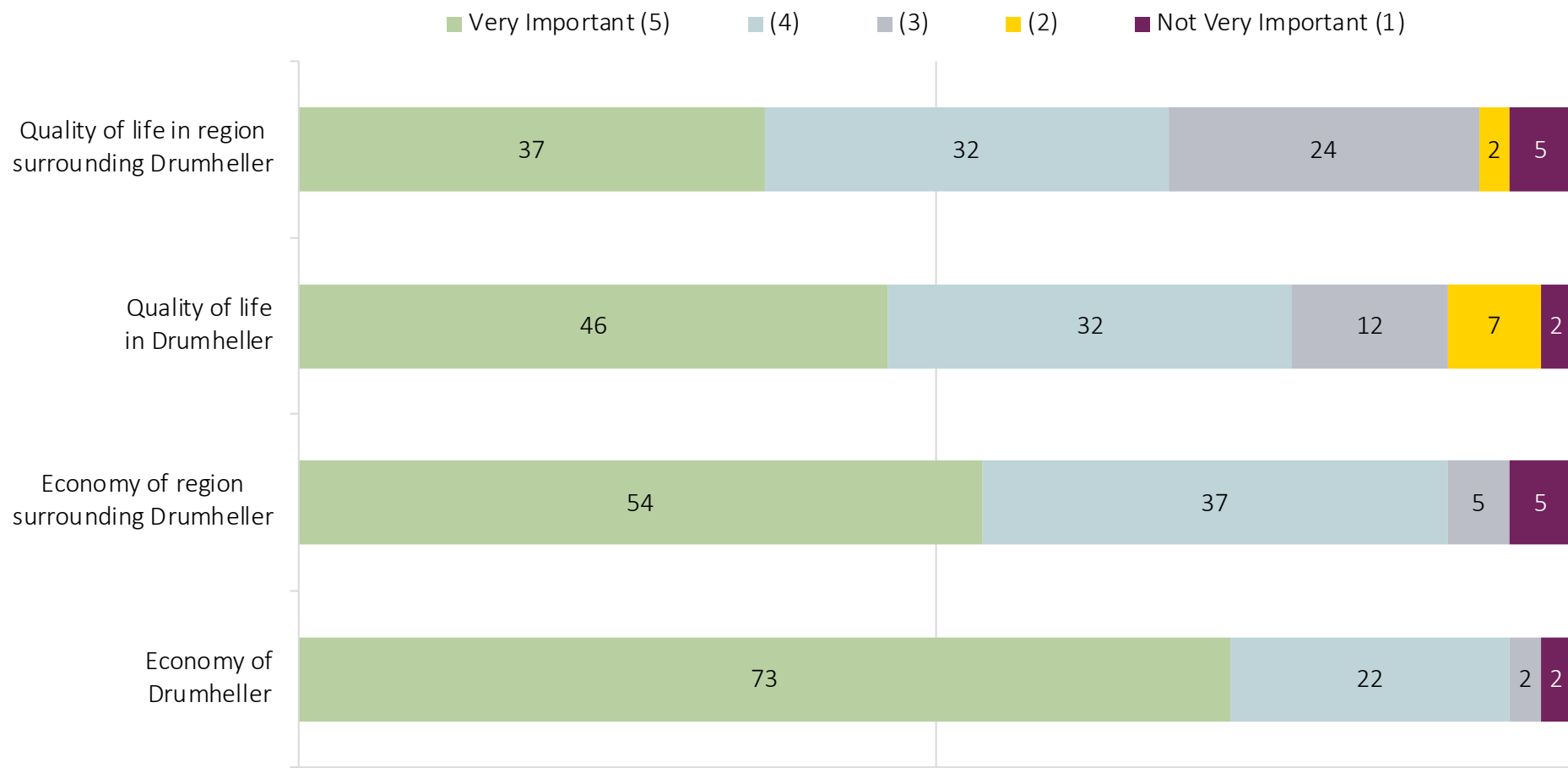


Base: All Respondents. (41)
Q2. n the map of the Drumheller region below, please indicate where the destination's greatest tourism and hospitality assets are that you mentioned in the previous question. Please click on the corresponding marker and highlight areas directly on the map where theses assets are located.

t.31



Stakeholders agree that the tourism and hospitality industry is a significant driver of economic growth and quality of life in Drumheller and the surrounding area.



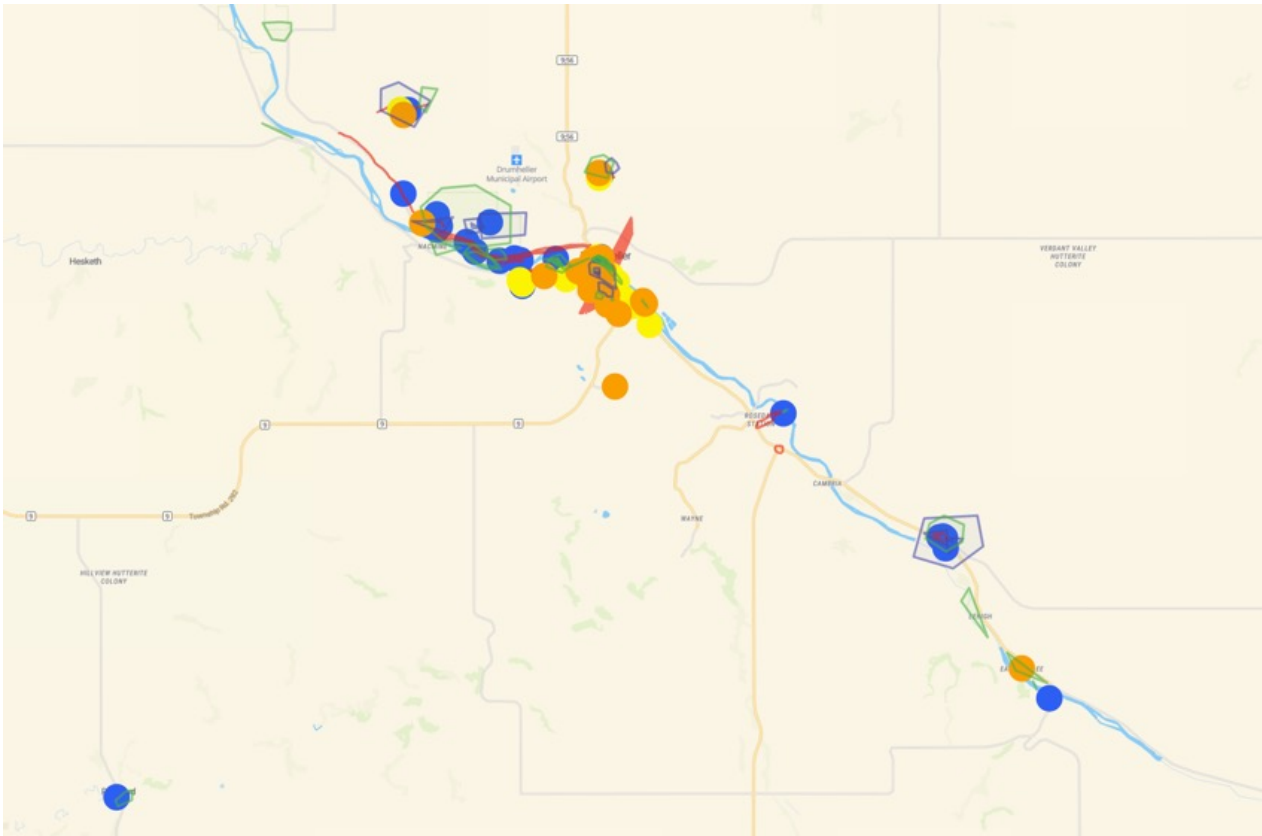
Base: All Respondents (41).
Q4. How important is the tourism and hospitality industry to the Drumheller region? Please indicate for the following categories using the five-point scale where 1 is 'not at all important' and 5 is 'extremely important'.

Respondents identify labour shortage, lack of infrastructure to house workforce and tourists, high cost of living, and seasonality as challenges impeding sustainable industry growth.



Base: All Respondents (41).
Q5. What are some of the main challenges that are impeding the sustainable growth of the tourism and hospitality industry in Drumheller?

Stakeholders identified numerous challenges, primarily concentrated in the downtown Drumheller area (all map layers).

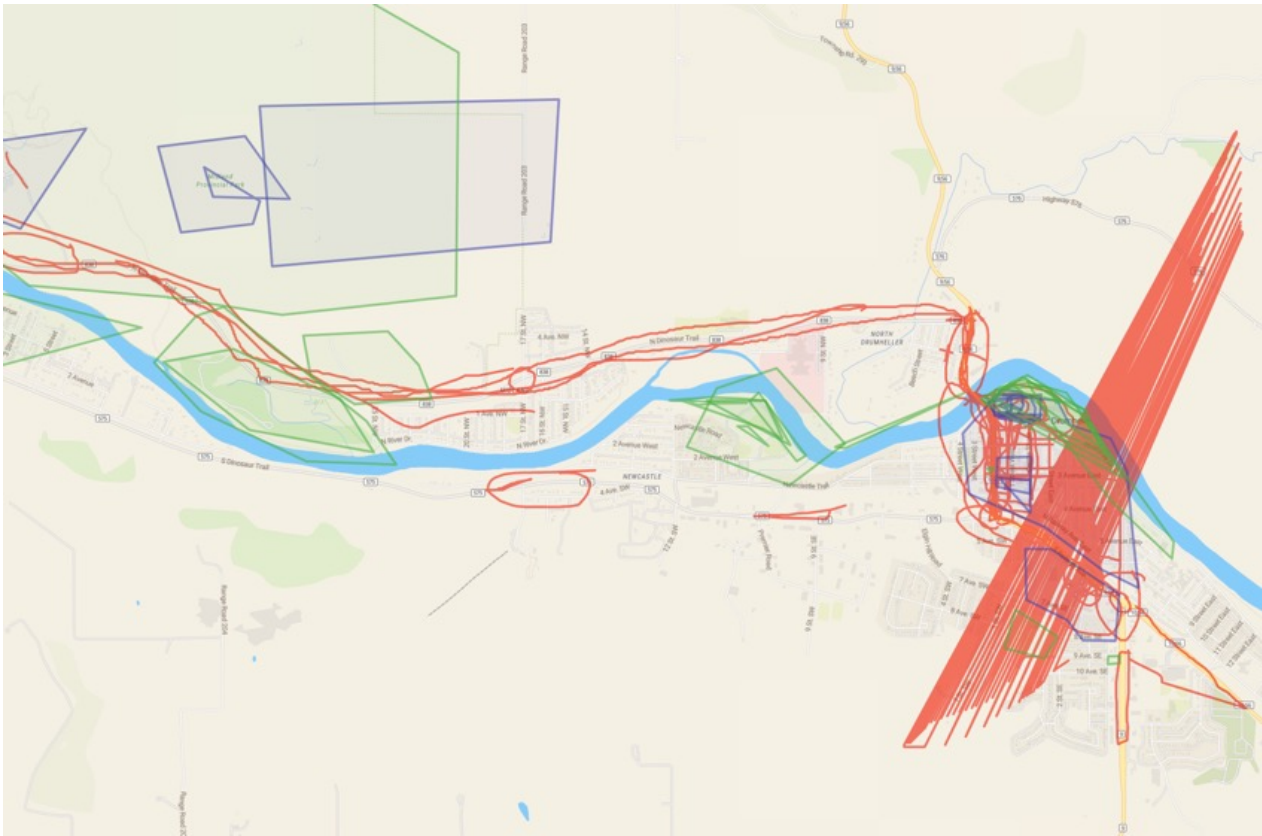


Legend

- | | | |
|---|--|---|
| ● Parking | ● Noise | ● Social Issues |
| — Traffic Congestion | — Environmental | — Over-Tourism |

Base: All Respondents (41).
Q6. In the map of the Drumheller region below, please indicate areas of potential challenges for the region, specifically related to parking, traffic congestion, noise, poverty/social issues, environmental issues, and other areas (please specify). Please click on the corresponding marker and highlight areas directly on the map.

Stakeholders identified numerous challenges, primarily concentrated in the downtown Drumheller area (traffic, environment, and over-tourism).

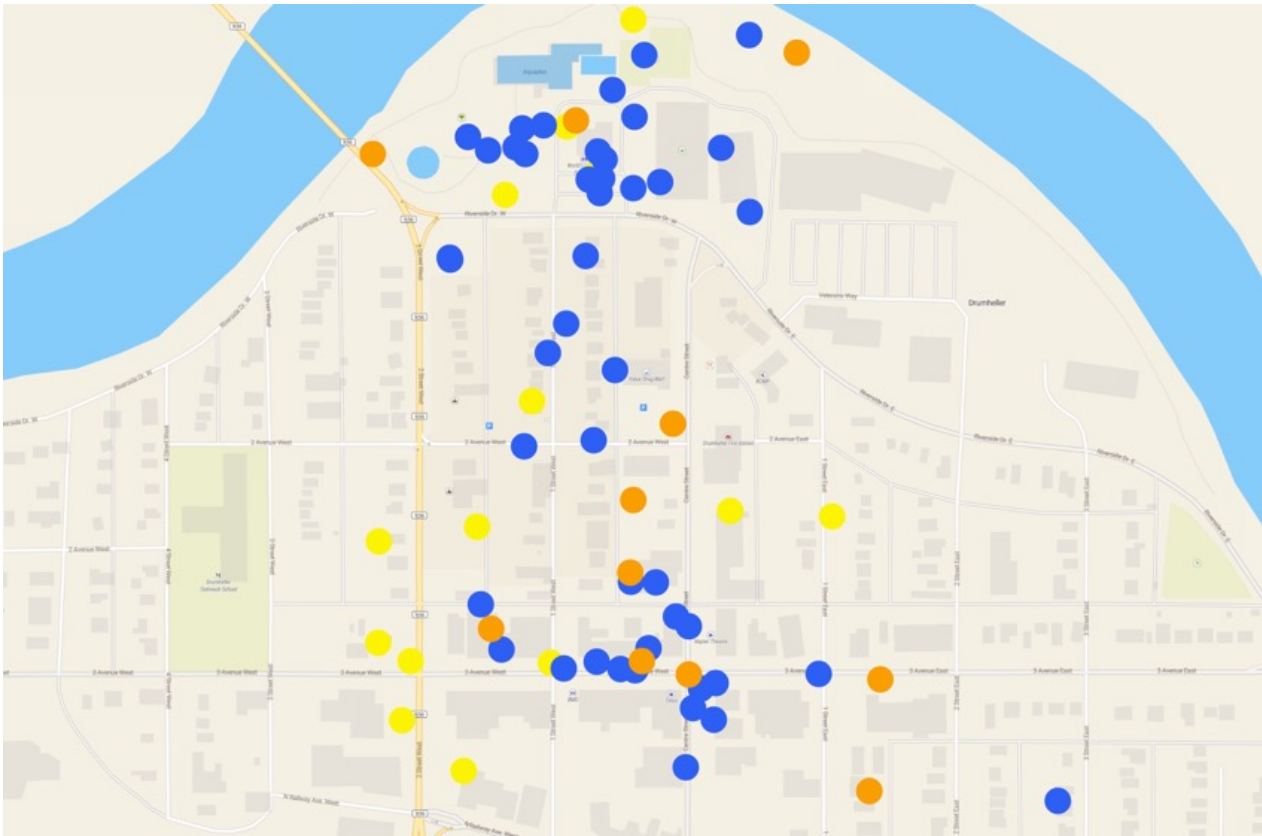


Legend

- Parking
- Noise
- Social Issues
- Traffic Congestion
- Environmental
- Over-Tourism

Base: All Respondents (41).
Q6. In the map of the Drumheller region below, please indicate areas of potential challenges for the region, specifically related to parking, traffic congestion, noise, poverty/social issues, environmental issues, and other areas (please specify). Please click on the corresponding marker and highlight areas directly on the map.

Stakeholders identified numerous challenges, primarily concentrated in the downtown Drumheller area (parking, noise, and social issues).



Legend

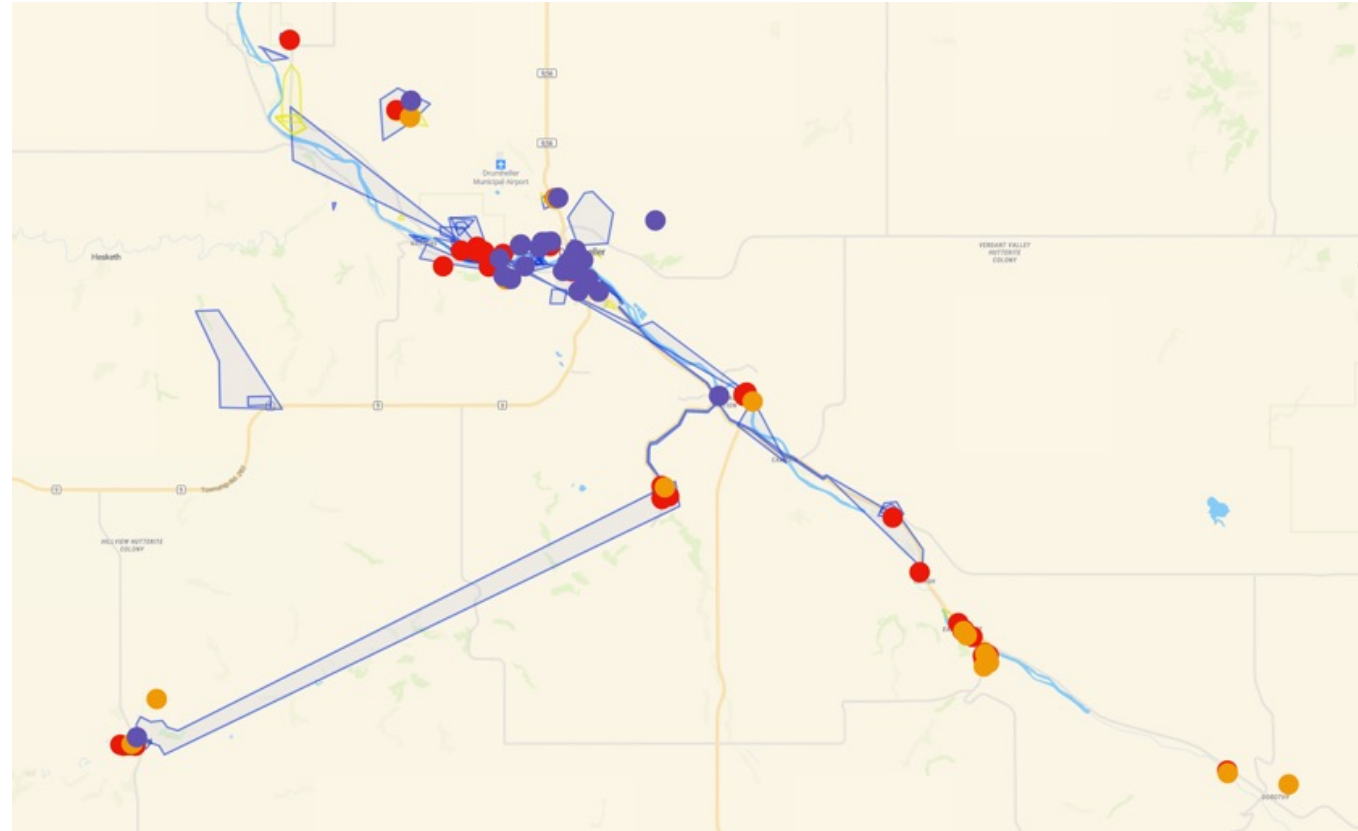
- Parking
- Noise
- Social Issues
- Traffic Congestion
- Environmental
- Over-Tourism

Base: All Respondents (41).
Q6. In the map of the Drumheller region below, please indicate areas of potential challenges for the region, specifically related to parking, traffic congestion, noise, poverty/social issues, environmental issues, and other areas (please specify). Please click on the corresponding marker and highlight areas directly on the map.

Q7. What are some of the main opportunities ahead for tourism and hospitality development in the Drumheller Region?

OPPORTUNITIES TO EXPAND OR DEVELOP

Accommodation opportunities are viewed as widespread throughout the region, while historic and sporting site opportunities are more clustered in certain areas (all map layers).



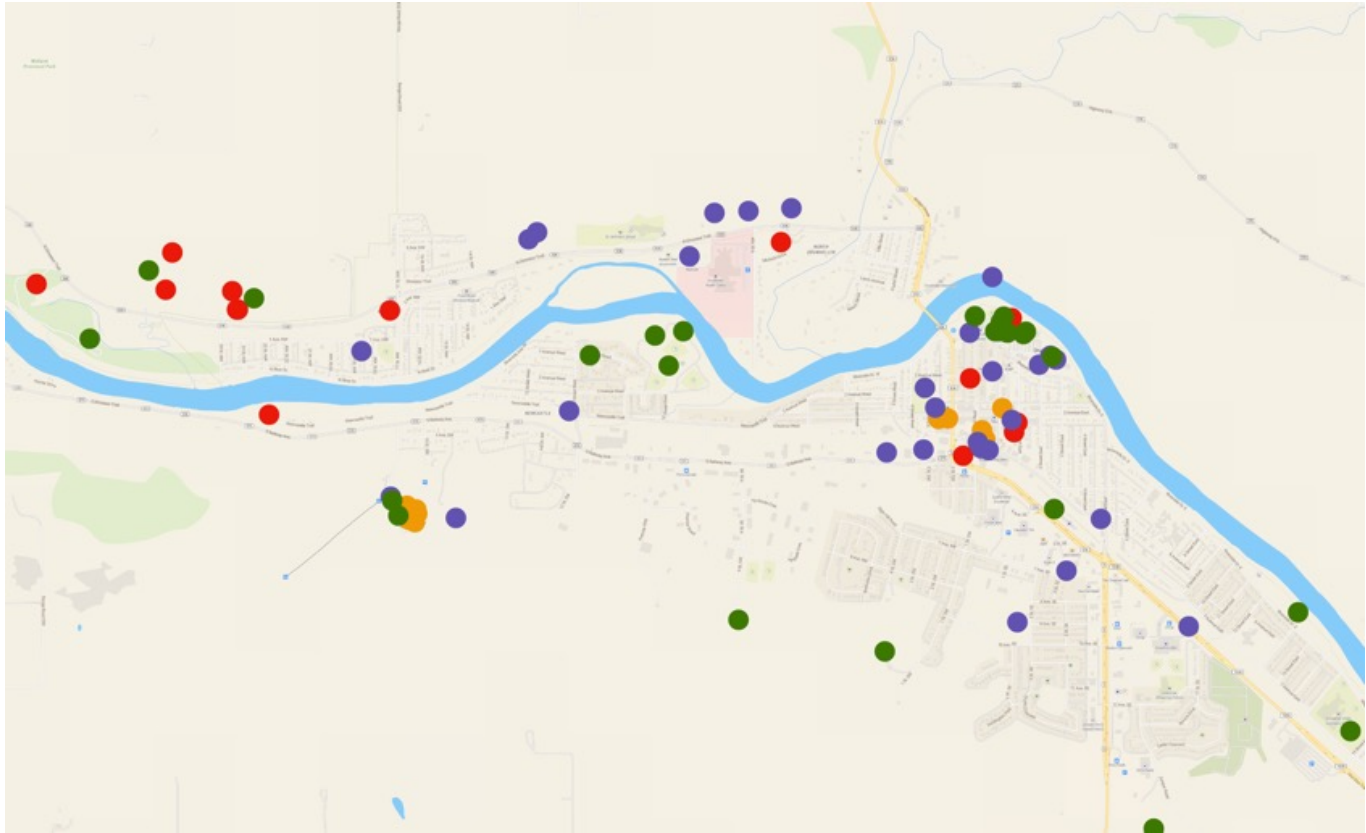
Legend

- Natural Sites ● Sporting Sites ● Historic Sites ● Cultural Sites
- Entertainment Attractions — Accommodation

Base: All Respondents (41).

Q8. In the map of the Drumheller region below, please indicate areas of potential opportunities to expand or develop tourism and hospitality, specifically related to 1) natural sites, 2) historic sites, 3) entertainment attractions, 4) cultural sites, 5) accommodation, 6) sporting sites, and 7) other areas (please specify). Please click on the corresponding marker and highlight areas directly on the map.

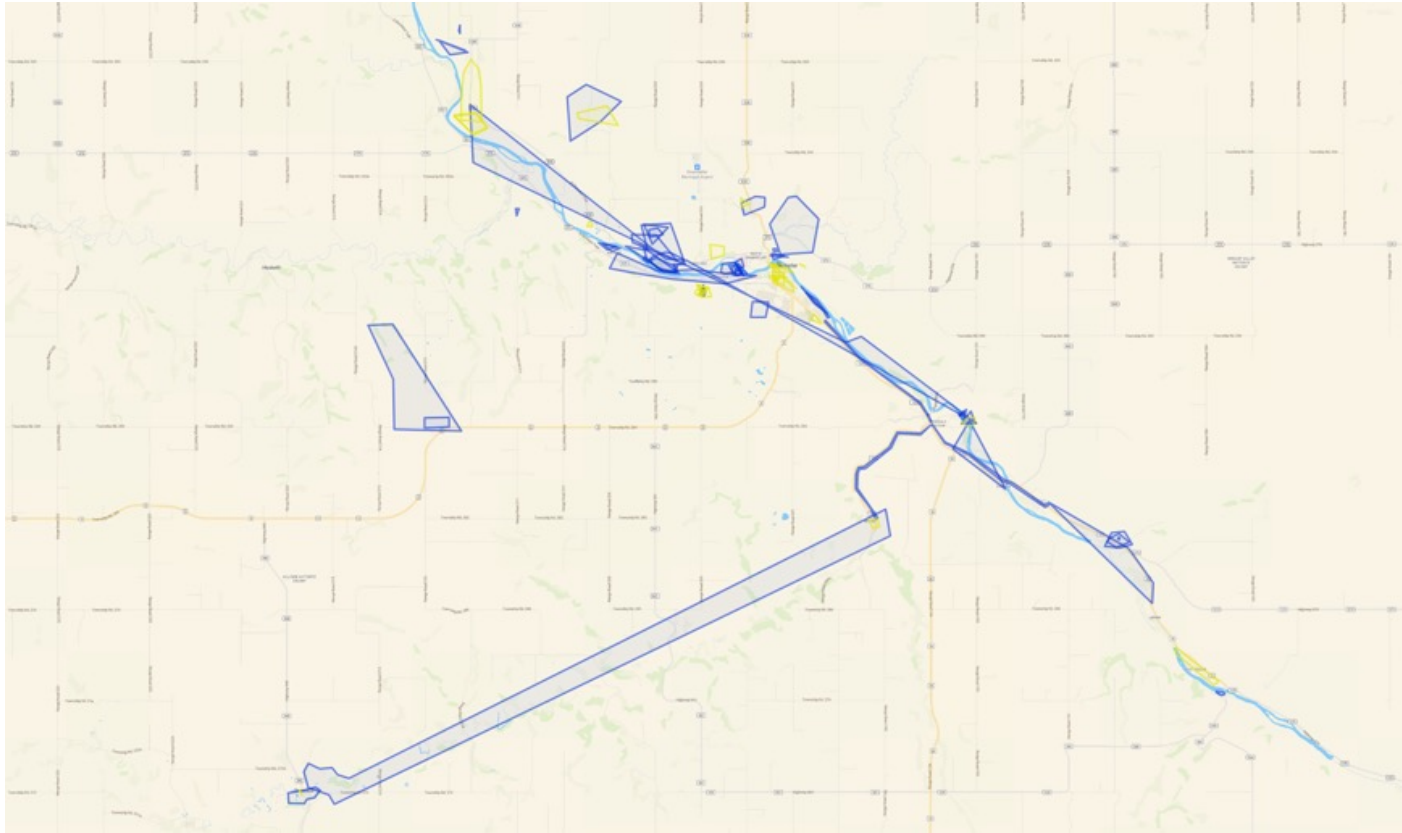
Accommodation opportunities are viewed as widespread throughout the region, while historic and sporting site opportunities are more clustered in certain areas (natural, sporting, historic, and cultural).



- Legend**
- Natural Sites
 - Sporting Sites
 - Historic Sites
 - Cultural Sites
 - Entertainment Attractions
 - Accommodation

Base: All Respondents (41).
Q8. In the map of the Drumheller region below, please indicate areas of potential opportunities to expand or develop tourism and hospitality, specifically related to 1) natural sites, 2) historic sites, 3) entertainment attractions, 4) cultural sites, 5) accommodation, 6) sporting sites, and 7) other areas (please specify). Please click on the corresponding marker and highlight areas directly on the map.

Accommodation opportunities are viewed as widespread throughout the region, while historic and sporting site opportunities are more clustered in certain areas (entertainment and accommodation).



Legend

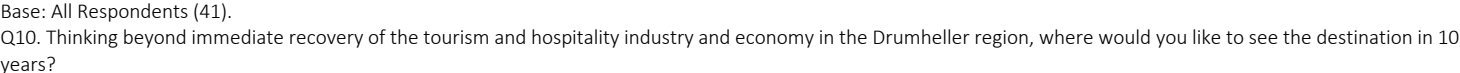
- Natural Sites
- Sporting Sites
- Historic Sites
- Cultural Sites
- Entertainment Attractions
- Accommodation

Base: All Respondents (41).
Q8. In the map of the Drumheller region below, please indicate areas of potential opportunities to expand or develop tourism and hospitality, specifically related to 1) natural sites, 2) historic sites, 3) entertainment attractions, 4) cultural sites, 5) accommodation, 6) sporting sites, and 7) other areas (please specify). Please click on the corresponding marker and highlight areas directly on the map.

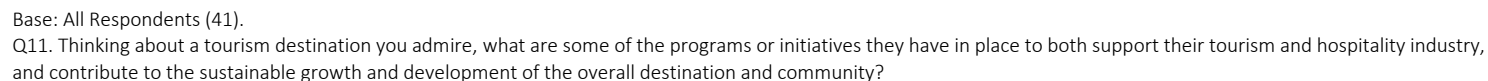
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Q9. What are some areas Travel Drumheller could improve or enhance to support the tourism and hospitality industry in the Drumheller region over the next decade?

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APPENDIX D: INITIATIVE PRIORITIZATION ASSESSMENT & RESULTS

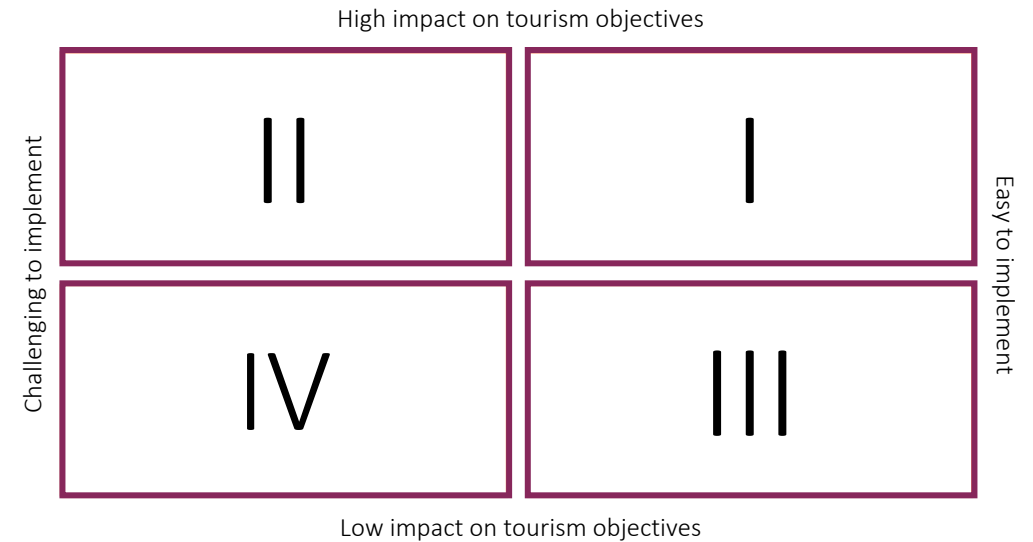
Initiative Prioritization Assessment

The Discovery phase identified a multitude of possible initiatives that Drumheller could undertake to achieve its strategic objectives over the next months and years.

The question then was how to prioritize those initiatives to identify the ones that would most likely enable Drumheller to achieve their strategic goals and objectives given funding and staffing are finite resources available to oversee its implementation.

The Drumheller Destination Development Plan’s Steering Committee engaged in a prioritization exercise to rank each initiative identified, ultimately categorizing initiatives in the following way:

- I. Immediate opportunities that can be accomplished
- II. Opportunities requiring development/exploration, with strong likelihood to achieve objectives, that need more time/attention/research and resources
- III. Opportunities that may have some/niche impact on objectives and are easy to implement
- IV. Opportunities that may need to be reassessed when conditions improve to make them easier to implement or become more important (e.g., trends become more favorable)



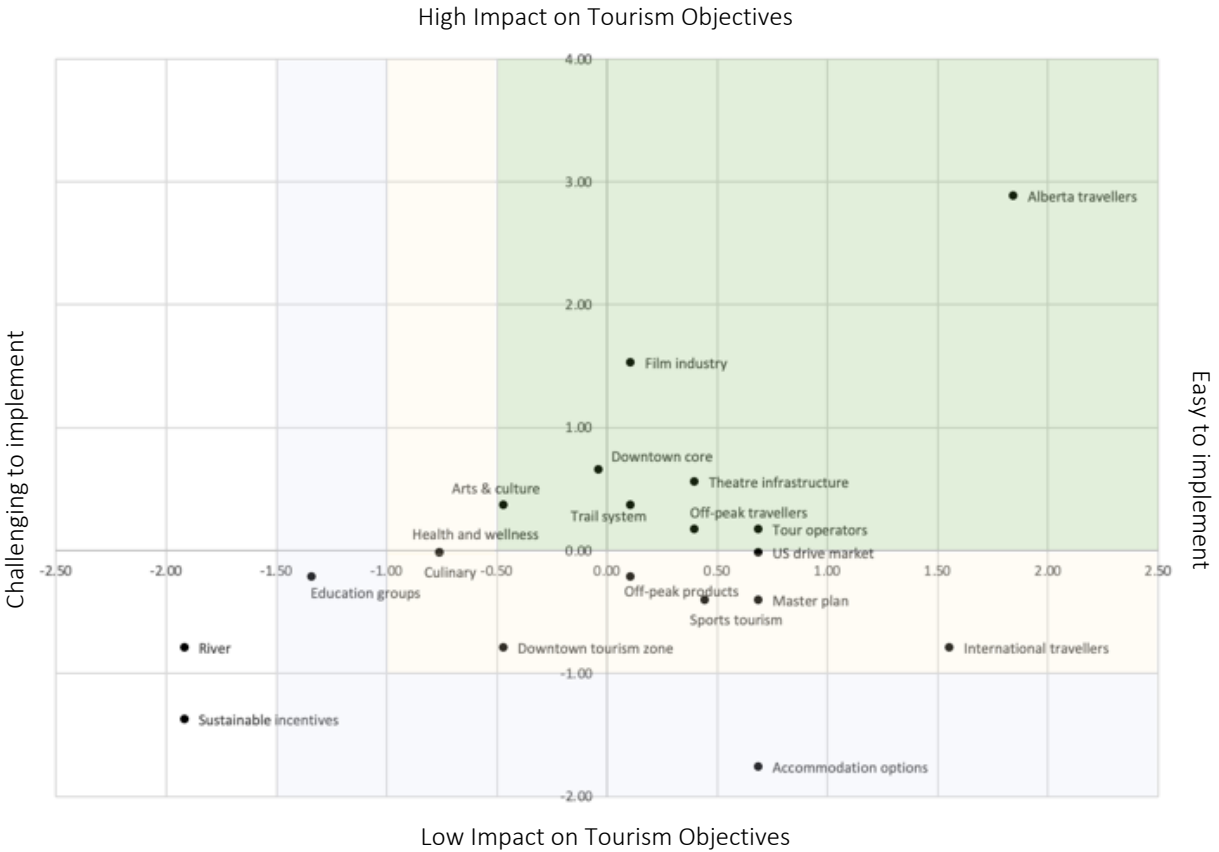
Initiative Prioritization Assessment Results

Results of the prioritization exercise conducted with the Drumheller Destination Development Plan Steering Committee resulted in a clear identification of priorities with strong impact on immediate objectives, and that were relatively easy to implement versus others that may require a longer runway for implementation. Results of the exercise were quantified, normalized for outliers, and depicted in the following chart.

Initiatives located in the top right quadrant are those that are most likely to achieve immediate strategic objectives and that are the easiest to implement, while those in the bottom left quadrant are those that require additional development.

Results of this exercise explicitly define the importance and ease of implementation of initiatives based on the identified objectives.

It is important to note that results of this process are not standalone – meaning additional conversations and expert opinions were required to finetune the importance, order, and timing of the initiatives listed.





APPENDIX E: DESTINATION DEVELOPMENT INVESTMENT OPPORTUNITIES

Destination Development Investment Opportunities

We identified 10 potential destination development investment opportunities at various stages of maturity and potential return on investment for tourism in Drumheller:

OPPORTUNITY NAME	TIME (S,M,L)	INVESTMENT (S,M,L)	SEASON	CONCEPT OVERVIEW	TOURISM POTENTIAL	GAPS ADDRESSED	SEGMENTS
BADLANDS AMPHITHEATRE ENHANCEMENTS	M	M	Peak, shoulder, winter	Four hundred acres constitute a rare opportunity to create much needed products, experiences, and unique accommodations to attract visitors to the Drumheller region seeking a multi-experience destination	<ul style="list-style-type: none"> • Increase capacity for more leisure visitors • Improve visitor experience • Attract new visitors (local and international) • Improve tourism seasonality 	<ul style="list-style-type: none"> • Under-utilized asset • Lack of accommodation options • Lack of experiences • Limited infrastructure to support visitor experience • Lack of venues for business/leisure events • Limited housing for tourism labour • Improvement of seasonality required 	<ul style="list-style-type: none"> • TA Curious Adventurers • TA Hotspot Hunters • Families • New Canadians • Art & culture enthusiasts • Religious tourists
PERFORMING ARTS CENTER ENHANCEMENTS	M	M	Peak, shoulder, winter	Rosebud is the Canadian Badlands' hidden gem. Not only is it a performance arts center, but it's also an educational facility and place for creatives to practice their art – not to mention a great place for small business and leisure events. It faces several challenges to be able to achieve the ambitions it has set for itself such as enhancement of existing performance areas, accommodations for visitors, staff, and students, as well as general need for additional amenities such as food options. This investment would require working with the areas leaders to identify potential areas for enhancing current performing arts facilities into a world-class theatre program/facility.	<ul style="list-style-type: none"> • Increase capacity for more leisure visitors • Improve visitor experience • Attract new visitors (local and international) • Improve tourism seasonality 	<ul style="list-style-type: none"> • Under-utilized asset • Lack of experiences • Limited infrastructure to support visitor experience • Lack of venues for business/leisure events • Lack of accommodation options • Limited housing for tourism labour • Improvement of seasonality required 	<ul style="list-style-type: none"> • TA Curious Adventurers • TA Hotspot Hunters • Families • New Canadians • Art & culture enthusiasts
MULTI-SPORTSPLEX WITH ADJACENT/ATTACHED HOTEL	L	H	Peak, shoulder, winter	Sport tourism can drive winter/shoulder season visitation while not compounding potential issues with existing high-season visitation flows. Drumheller is ideally suited to develop a multi-sport complex with multiple ice rinks (2) with the capacity to host amateur/youth sport tournaments (e.g., hockey, ringette, figure skating, dance, etc.), in conjunction with an adjacent hotel. With a strong existing destination mix, high awareness with existing markets, and proximity to major centres, Drumheller is well positioned to attract and leverage sport tourism.	<ul style="list-style-type: none"> • Increase capacity for more sports visitors (teams and entourage) • Increase potential for additional competitions, tournaments, events, etc. • Improve tourism seasonality • Improve livability 	<ul style="list-style-type: none"> • Lack of sports venues • Limited sports infrastructure to support more/enhanced sporting opportunities • Improvement of seasonality required 	<ul style="list-style-type: none"> • Sports teams, athletes, and their entourage

Destination Development Investment Opportunities

We identified 10 potential destination development investment opportunities at various stages of maturity and potential return on investment for tourism in Drumheller:

OPPORTUNITY NAME	TIME (S,M,L)	INVESTMENT (S,M,L)	SEASON	CONCEPT OVERVIEW	TOURISM POTENTIAL	GAPS ADDRESSED	SEGMENTS
BADLANDS MOTORSPORTS RESORT	S	M	Peak, shoulder	Badlands Motorsports Resort presents a vision for a world-class motorsports facility and recreation resort that can host motorists and car-enthusiasts from all over the world, in conjunction with a sustainable multi-faceted destination resort (accommodation, restaurants, spa, etc.). This development has already received its required approvals and permits, and is expected to break ground in 2023 however, further investment is required. This development represents the potential to develop a new market for the region and expand brand awareness and appeal. The project proponents are aware of some resident concerns (i.e., road access, noise, environmental concerns) and are working through an environmental appeal process to mitigate these concerns. Mitigation strategies could include the development of sound reducing berms, conservation areas within the project boundaries for birds and wildlife, electrical car options, etc.	<ul style="list-style-type: none"> • Provide more options for business/leisure visitors • Add more experiences in unique settings • Improve visitor experience • Attract new visitors (local and international) 	<ul style="list-style-type: none"> • Lack of experiences • Lack of venues for business/leisure events • Limited infrastructure to support visitor experience 	<ul style="list-style-type: none"> • TA Hotspot Hunters • Motorsports enthusiasts
HOTEL ATTACHED TO BADLANDS COMMUNITY CENTRE	M	H	Peak, shoulder, winter	The Badlands Community Centre is one of the best and largest, if under-utilized, event venues Drumheller, able to host both business (e.g., small and medium conferences) and leisure (e.g., weddings) events. One of the major challenges it faces is a lack of convenient accommodations nearby to host larger parties, while also being walking distance to another major under-utilized Drumheller attraction: the downtown core. Attracting a hotel to be build adjacent/attached to the Canadian Badlands Community Facility to increase MICE, special events (e.g., weddings), would ensure more events, thus more visitors in Drumheller.	<ul style="list-style-type: none"> • Increase capacity for more business/leisure visitors • Improve opportunities for more events • Improve tourism seasonality 	<ul style="list-style-type: none"> • Lack of accommodation options • Lack of experiences • Limited infrastructure to support visitor experience 	<ul style="list-style-type: none"> • MICE visitors

Destination Development Investment Opportunities

We identified 10 potential destination development investment opportunities at various stages of maturity and potential return on investment for tourism in Drumheller:

OPPORTUNITY NAME	TIME (S,M,L)	INVESTMENT (S,M,L)	SEASON	CONCEPT OVERVIEW	TOURISM POTENTIAL	GAPS ADDRESSED	SEGMENTS
DOWNTOWN BOUTIQUE HOTEL	M	M	Peak, shoulder, winter	One of the major challenges impeding Drumheller from growing its business and leisure tourism is the availability of accommodation options, especially for those who desire a more authentic experience beyond the typical hotel chains. This potential investment suggests attracting a 30-50 room boutique hotel, in or near, downtown Drumheller targeting couples and families in order to provide them with additional accommodation options as well as a convenient place to stay to explore Drumheller and stay longer.	<ul style="list-style-type: none"> Provide additional accommodation options for business/leisure visitors Add more experiences in unique settings Improve visitor experience Attract new visitors (local and international) Improve tourism seasonality 	<ul style="list-style-type: none"> Lack of accommodation options Lack of experiences Lack of venues for business/leisure events Limited infrastructure to support visitor experience Improvement of seasonality required 	<ul style="list-style-type: none"> TA Curious Adventurers TA Hotspot Hunters Families Couples MICE visitors
4-5-STAR RESORT-STYLE HOTEL	L	H	Peak, shoulder, winter	There are few destinations around the world that are in a place that has the ecological landscape that Drumheller has. It would be the perfect location (and demand is there!) for health and wellness getaways, particularly for those in larger urban areas, or those wishing to try something different than the Rockies with loved ones or a group of friends. This potential investment suggests attracting a destination resort-style boutique hotel (100 rooms) that could include a spa, wellness retreat, yoga, hiking, biking, outdoor nature, farm/ranch, etc. paired with high-end food and other amenities.	<ul style="list-style-type: none"> Increase capacity for more leisure visitors Add more experiences in unique settings Improve visitor experience Attract new visitors (local and international) Improve tourism seasonality 	<ul style="list-style-type: none"> Lack of accommodation options Lack of experiences Lack of venues for business/leisure events Limited infrastructure to support visitor experience Improvement of seasonality required 	<ul style="list-style-type: none"> TA Curious Adventurers TA Hotspot Hunters Couples Groups of friends MICE visitors
DOWNTOWN DRUMHELLER REVITALIZATION	M	M	Peak, shoulder, winter	The Town of Drumheller is a gem in and of itself, seemingly coming right off a set of a Hallmark movie. We can only envision the downtown aesthetic being standardized with dino-appeal in the peak season, and stunning decorations in the fall and winter, for example. In addition, updating visitor and community amenities such as sidewalks, bike lanes, public washrooms, Wi-Fi, charging stations, patios, murals, and enticing small business owners to move their businesses downtown that would create a concentration that is often required to enhance a vibe (and that's what visitors and communities want).	<ul style="list-style-type: none"> Increase capacity for more leisure visitors Add more experiences in unique settings Improve visitor experience Attract new visitors (local and international) 	<ul style="list-style-type: none"> Under-utilized asset Lack of experiences Social issues impacting visitor experience Lack of concentration of tourism to create vibe Limited infrastructure to support visitor experience Improvement of seasonality required 	<ul style="list-style-type: none"> TA Curious Adventurers TA Hotspot Hunters Families Couples

Destination Development Investment Opportunities

We identified 10 potential destination development investment opportunities at various stages of maturity and potential return on investment for tourism in Drumheller:

OPPORTUNITY NAME	TIME (S,M,L)	INVESTMENT (S,M,L)	SEASON	CONCEPT OVERVIEW	TOURISM POTENTIAL	GAPS ADDRESSED	SEGMENTS
HORSESHOE CANYON TOURISM INFRASTRUCTURE	S	M--current master plan	Peak, shoulder	With a tourism master plan in place, all that remains is key private/public investors to fund the build out to support development of products, experiences, infrastructure, trails, and accommodations to Horseshoe Canyon to realize its potential.	<ul style="list-style-type: none"> • Increase capacity for more leisure visitors • Improve visitor experience • Attract new visitors (local and international) 	<ul style="list-style-type: none"> • Under-utilized asset • Lack of experiences • Lack of venues for business/leisure events • Limited infrastructure to support visitor experience • Improvement of seasonality required 	<ul style="list-style-type: none"> • TA Curious Adventurers • TA Hotspot Hunters • Families • New Canadians
HORSETHIEF CANYON TOURISM INFRASTRUCTURE	M	L--no current master plan	Peak, shoulder	Spectacular viewpoint and hiking gem needs significant investment to bring it up to export tourism ready potential. Requires an increase support/resources in trails, infrastructure, potential accommodations, and experience animation.	<ul style="list-style-type: none"> • Increase capacity for more leisure visitors • Improve visitor experience • Attract new visitors (local and international) 	<ul style="list-style-type: none"> • Under-utilized asset • Lack of experiences • Lack of venues for business/leisure events • Limited infrastructure to support visitor experience • Improvement of seasonality required 	<ul style="list-style-type: none"> • TA Curious Adventurers • TA Hotspot Hunters • Families • New Canadians
HOODOOS TRAIL INFRASTRUCTURE DEVELOPMENT		M-no current master plan	Peak, shoulder	The Drumheller Hoodoos Trail “experience centre” is on of the few sites where visitors can park safely (across the road) and experience/interact with the hoodoos. Included in this amenity are stairs and lookout areas and signage explaining the phenomenon and significance of the hoodoos. In the parking area are temporary restrooms and sea cans with some retail, but are open only during the peak season. The site is popular among visitors but is an ageing and underwhelming tourism asset which could use significant investment in upgrading the amenity, signage and developing interpretation and experiences, a welcome centre and more retail and permanent washroom facilities to improve the overall experience.	<ul style="list-style-type: none"> • Increase capacity for more leisure visitors • Significantly improve the visitor experience • Potential for revenue generation for community and private sector • Attract new visitors 	<ul style="list-style-type: none"> • Under-utilized asset • Limited infrastructure to support the quality of the experience and visitor experience 	<ul style="list-style-type: none"> • TA Curious Adventurers • TA Hotspot Hunters • Families • New Canadians • Groups

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