

TRAVEL ALBERTA: 2023 RESIDENT SENTIMENT

SUMMER 2023 PULSE PRESENTATION - DRUMHELLER

December 2023



ALBERTA CONTEXTS

Resident perceptions of the tourism sector are continually shaped and influenced by external contexts. These same factors can impact how audiences engage with the industry as well. As such, it is important to acknowledge the provincial conditions that may influence how Albertans feel about the industry.

- Economic conditions remain stable, but worrisome to many Albertans
- Availability of affordable housing is concerning across Alberta, including Drumheller
- Tourism sector statistics continue to show a post-COVID rebound



PURPOSE & APPROACH OF THE WORK

PURPOSE

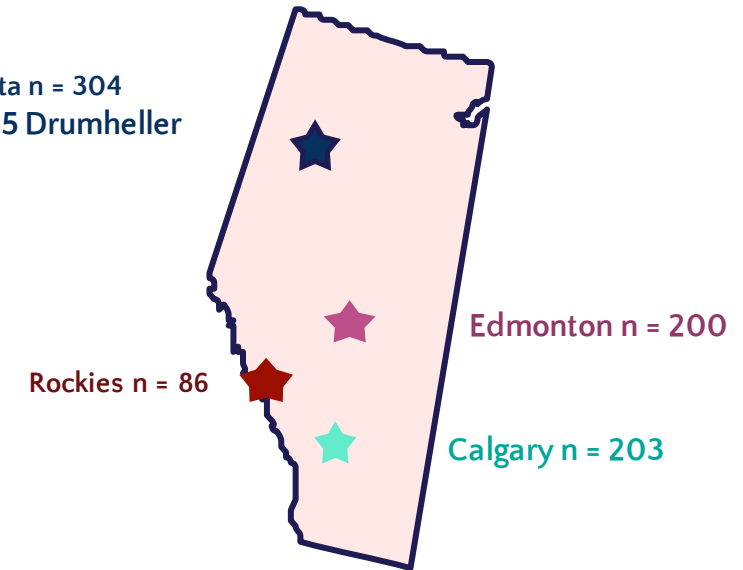
The purpose of this province-wide research is to track resident sentiment of the Alberta tourism and use the insights to inform decisions about destination development and management.

APPROACH

Online and phone interviews were conducted in key markets across Alberta between August 28th and September 25th, 2023. Results are weighted by age and gender within region and region size.

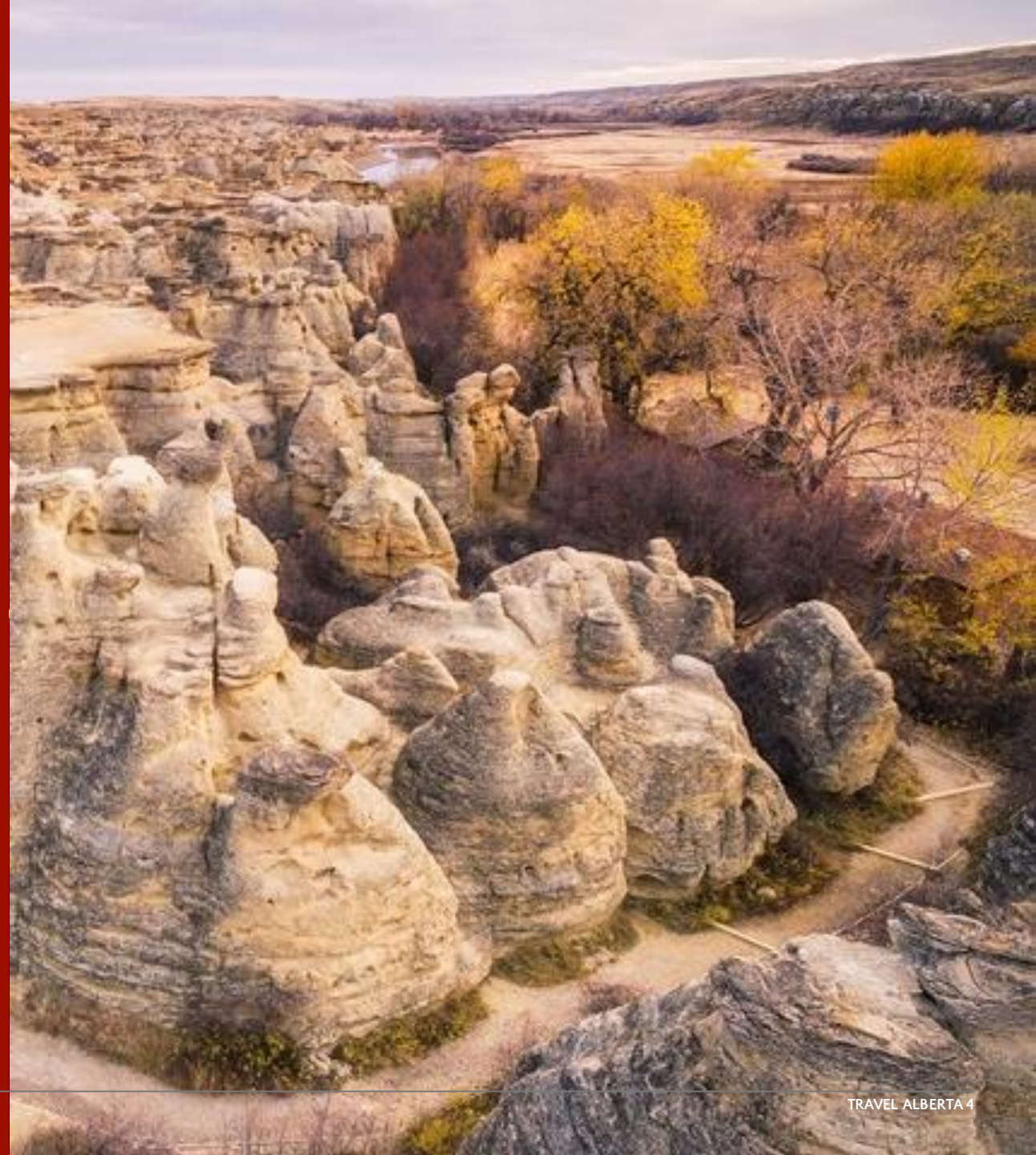
In **DRUMHELLER**, sampling was enhanced with social media promotion – effectively contributing to n=115 online surveys with residents.

Rural Alberta n = 304
Includes n = 115 Drumheller



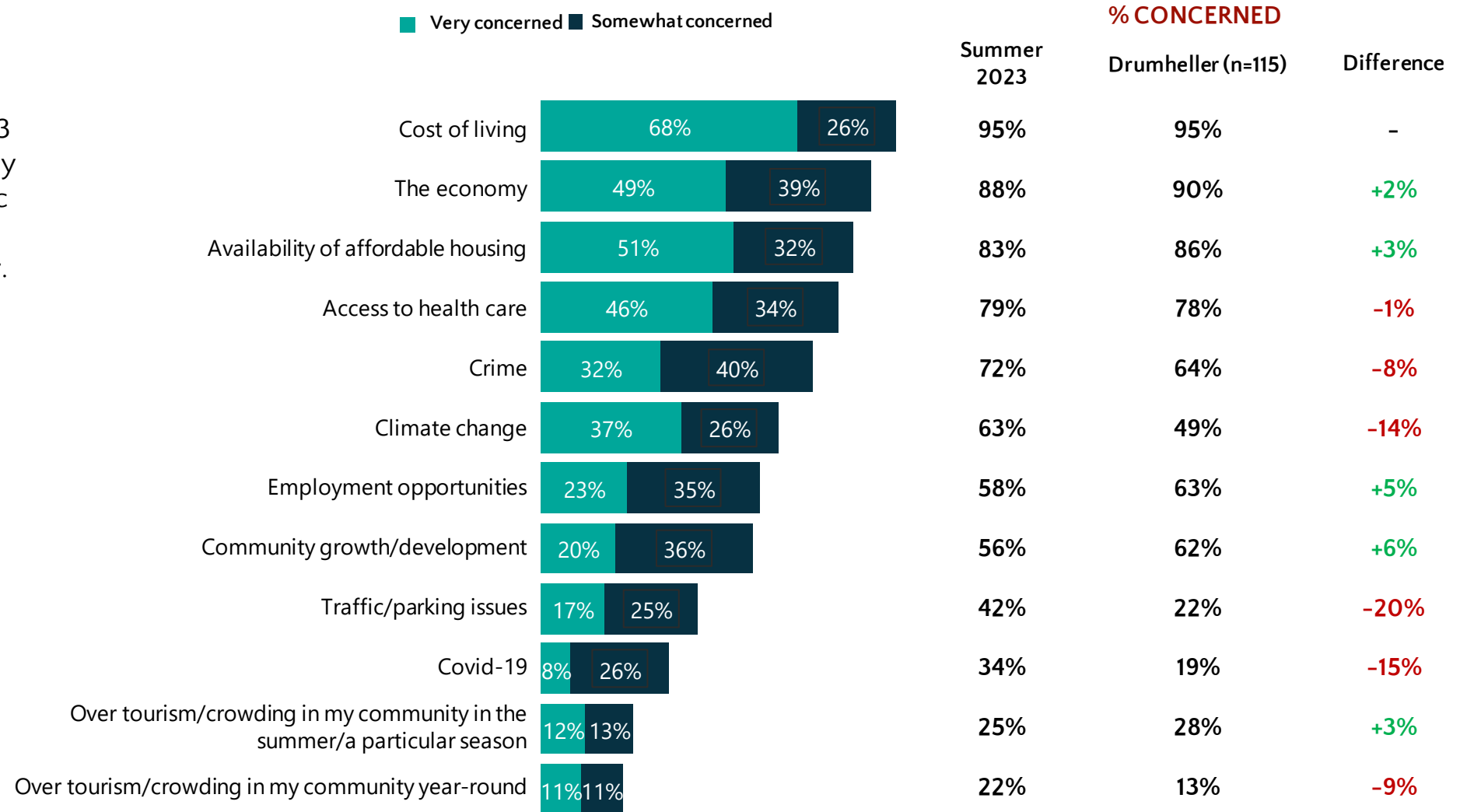
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COMMUNITY
CONTEXT

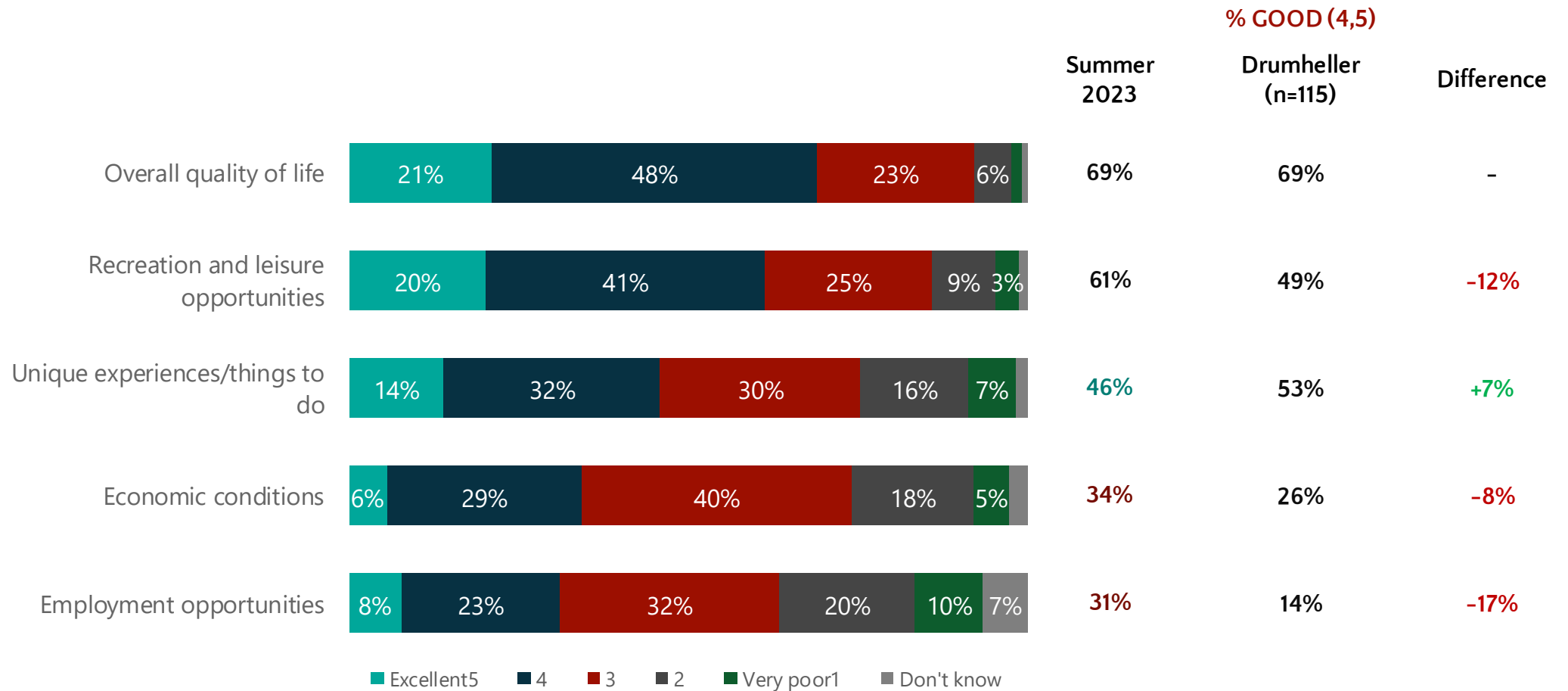


THE ALBERTA ISSUE AGENDA WILL SHIFT IN RESPONSE TO CONTEXTS

Drumheller aligns with the top 3 concerns but differs substantially regarding concerns about traffic issues, Covid-19 and climate change – rating the three lower.



RESIDENTS RATE THEIR AREAS WELL OVERALL, ALTHOUGH WE CONTINUE TO SEE A DECREASE IN ATTITUDES TOWARD THE ECONOMY AND EMPLOYMENT OPPORTUNITIES, PARTICULARLY IN DRUMHELLER (EXCEPT IN REFERENCE TO THE EXPERIENCES/THINGS TO DO).



Q9. How would you rate the following in your community? For each element please use a scale of 1 to 5 where 1 means that element is very poor and 5 means that element is excellent. Base: All Respondents (n=793)

% Active/Frequent Participation

Drumheller: 59%

Rockies: 53%

Rural Alberta: 46%

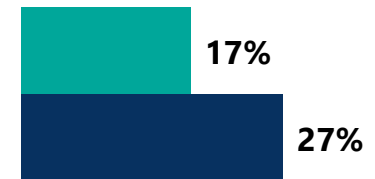
Edmonton: 46%

Calgary: 41%

ALBERTANS ARE SELECTIVE IN THE ACTIVITIES THEY PARTICIPATE IN, WHEREAS DRUMHELLER IS CONSIDERS THEMSELVES SIGNIFICANTLY MORE ACTIVE

COMMUNITY PARTICIPATION

Very active participation – I seek out many activities, attractions, and events. I often try new things and participate in a variety of different things in my community



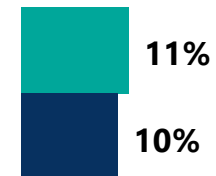
Frequent participation – I attend quite a few activities, attractions, and events. But I typically stick to the same things and only one or two types



Selective participation – I am more selective and only take part in only a few activities, attractions, and events

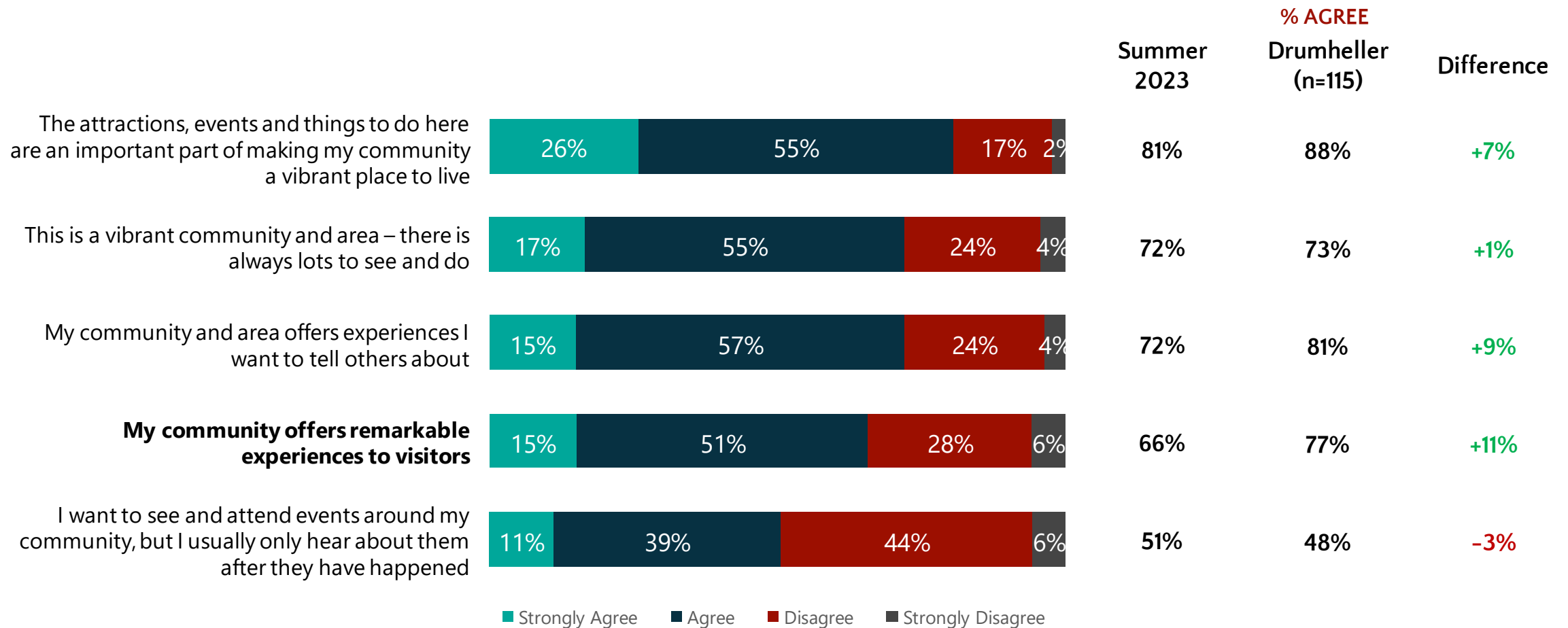


Guarded participation – I generally avoid community activities, attractions, and events. I mostly stick close to home with family and am less interested in things going on in the community

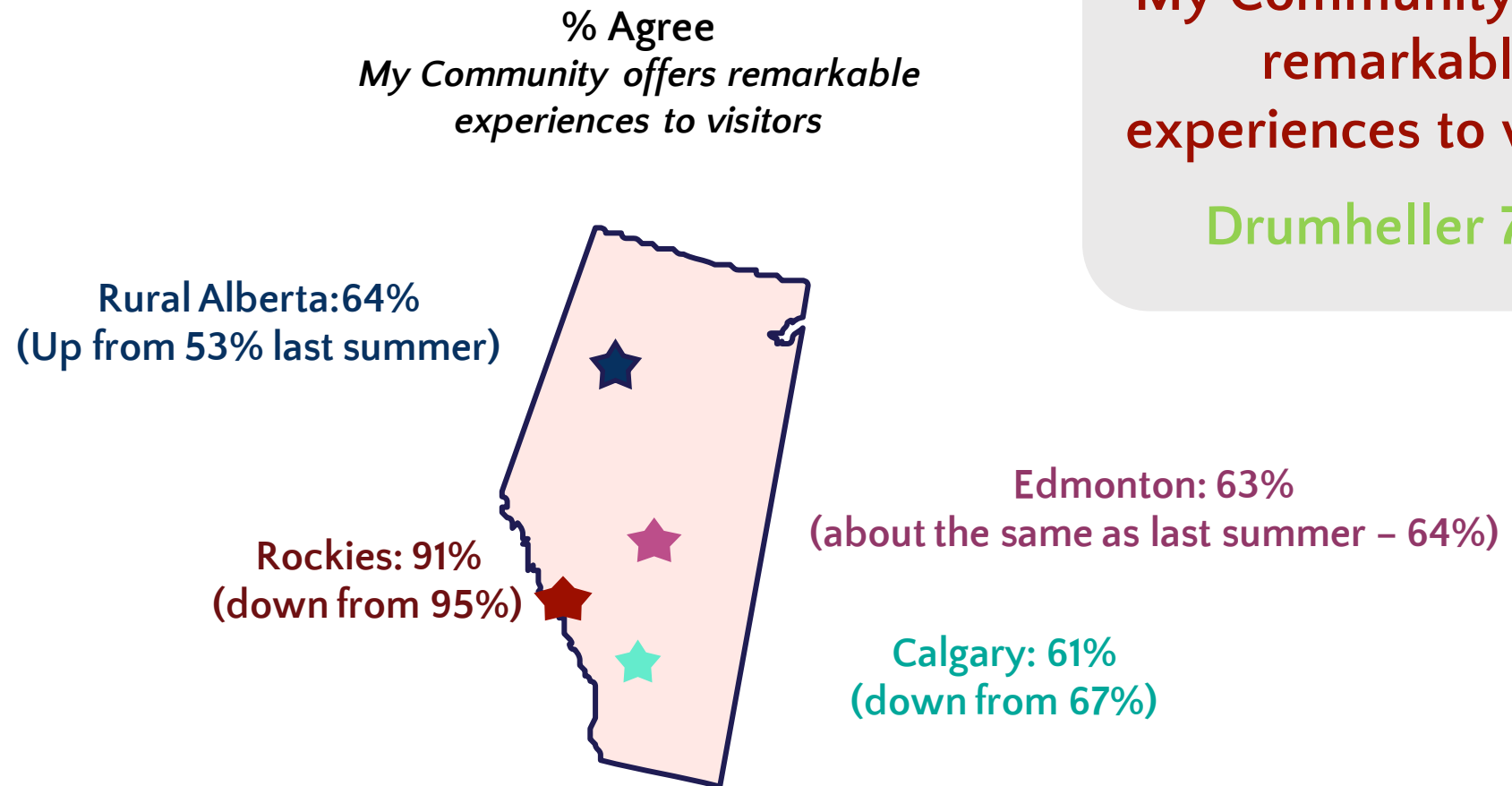


■ Summer 2023
■ Drumheller (n=115)

ALBERTANS CONTINUE TO HAVE POSITIVE ATTITUDES ABOUT LIFE IN THEIR COMMUNITY, WITH ATTITUDES STRENGTHENING THIS YEAR. RELATIVE TO ALBERTA, THOSE IN DRUMHELLER FEEL MORE STRONGLY ABOUT THEIR COMMUNITY AND WHAT IT HAS TO OFFER.



PERCEPTIONS OF THE AVAILABILITY OF REMARKABLE EXPERIENCES TEND TO BE A STEADY INDICATOR OF OVERALL SENTIMENT WITHIN A DESTINATION. THE ROCKIES AND DRUMHELLER RANK THEMSELVES HIGHEST.



My Community offers remarkable experiences to visitors

Drumheller 77%

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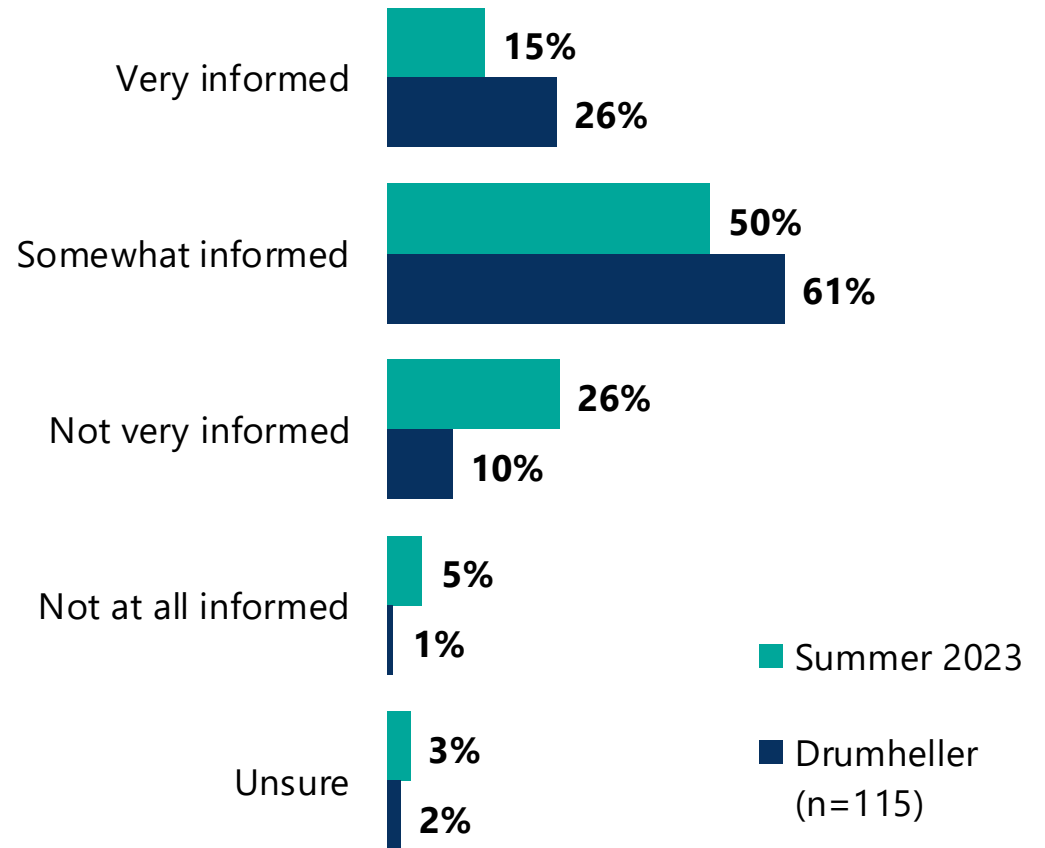
IMPACT OF TOURISM SECTOR





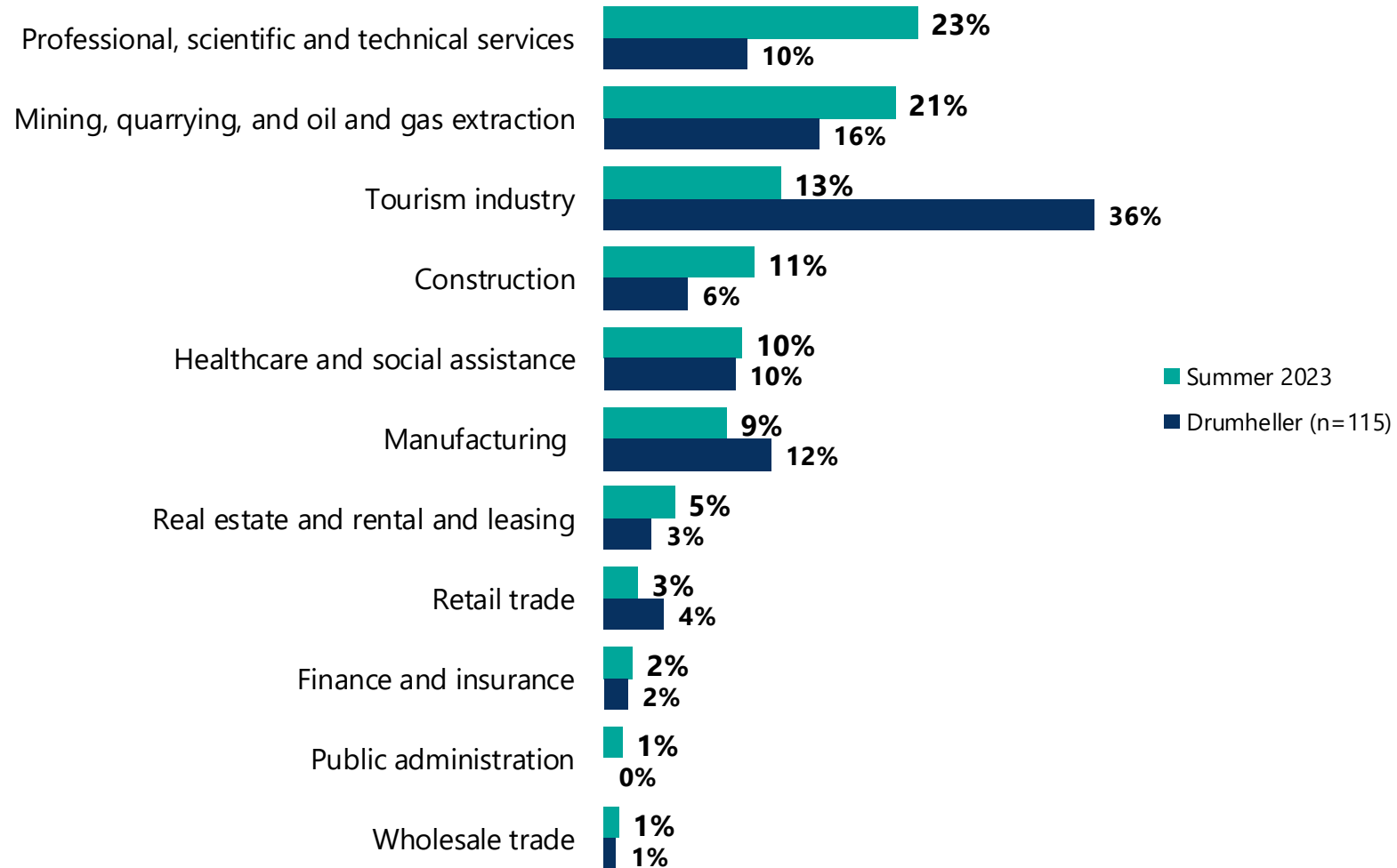
THE MAJORITY OF DRUMHELLER CONSIDER THEMSELVES INFORMED ABOUT THE TOURISM INDUSTRY, ESPECIALLY RELATIVE TO THE REST OF THE PROVINCE.

TOURISM SECTOR EXPERTISE

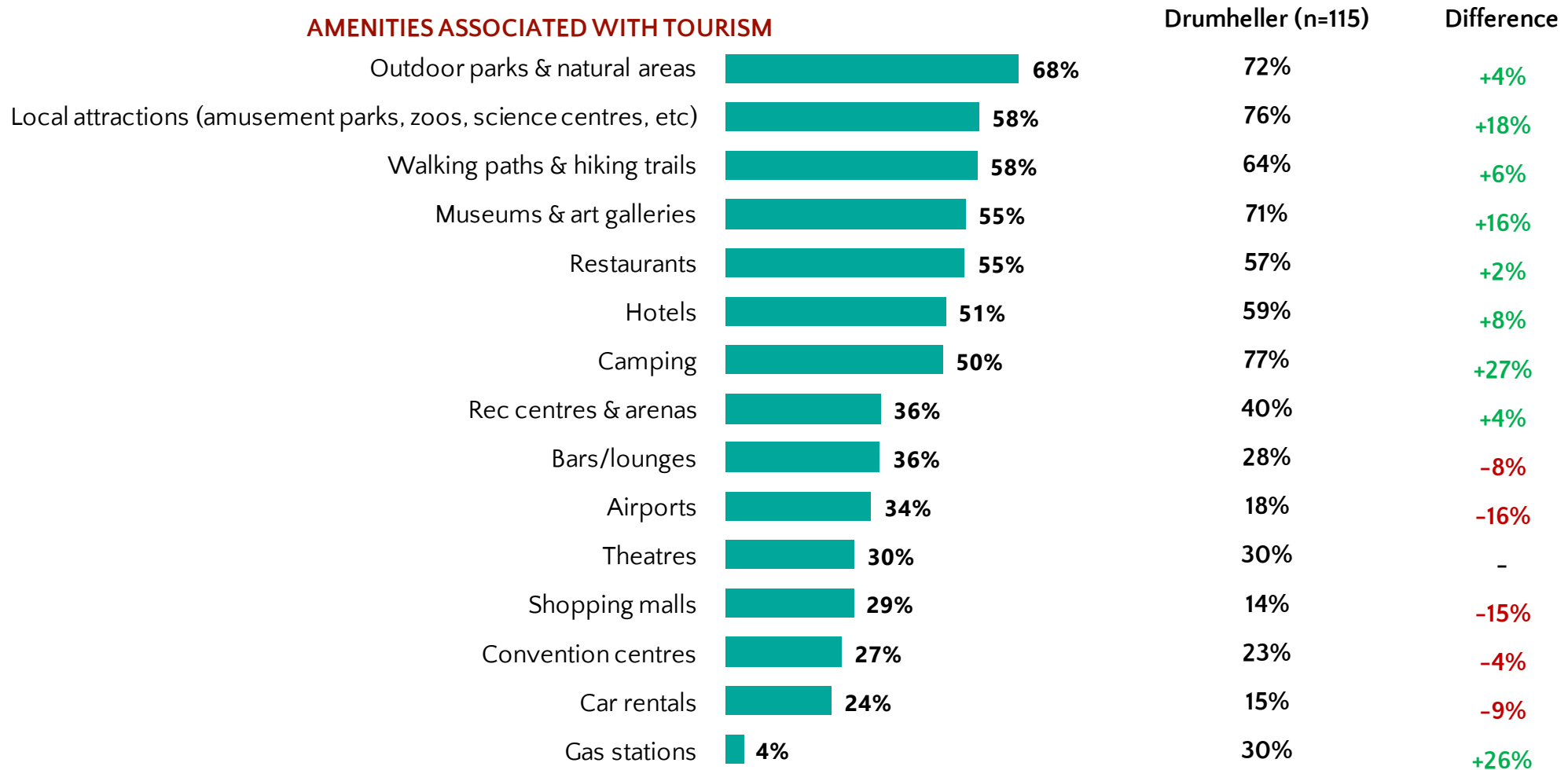


INDUSTRIES WITH THE GREATEST GROWTH POTENTIAL INCLUDE PROFESSIONAL SERVICES, OIL & GAS RELATED AND TOURISM. TOURISM IS SUBSTANTIALLY HIGHER IN DRUMHELLER.

GREATEST GROWTH POTENTIAL



MODEST NUMBERS OF ALBERTANS CONTINUE TO ASSOCIATE KEY INFRASTRUCTURE PIECES IN THEIR COMMUNITY WITH THE TOURISM SECTOR. DRUMHELLER ASSOCIATED MORE AMENITIES WITH TOURISM.

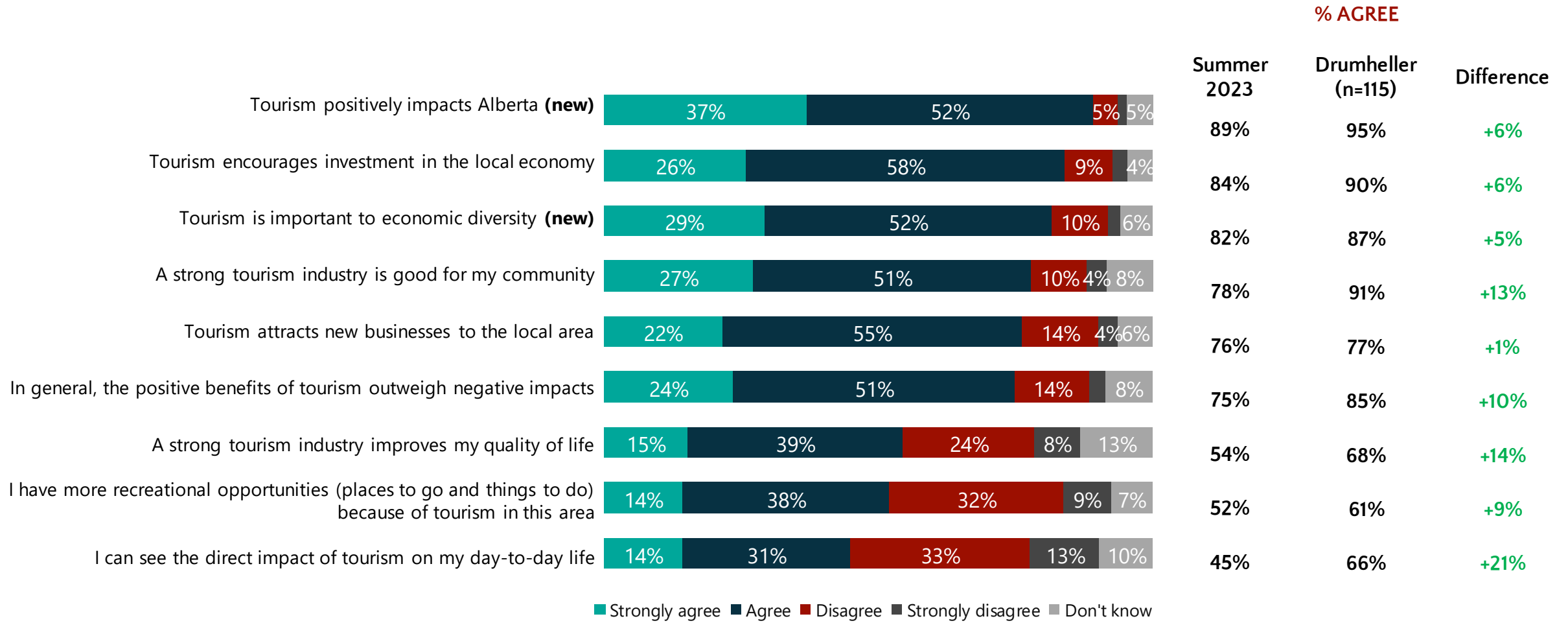


IMPORTANCE OF TOURISM

Residents in Drumheller have a much stronger appreciation of the industry and its importance their community.

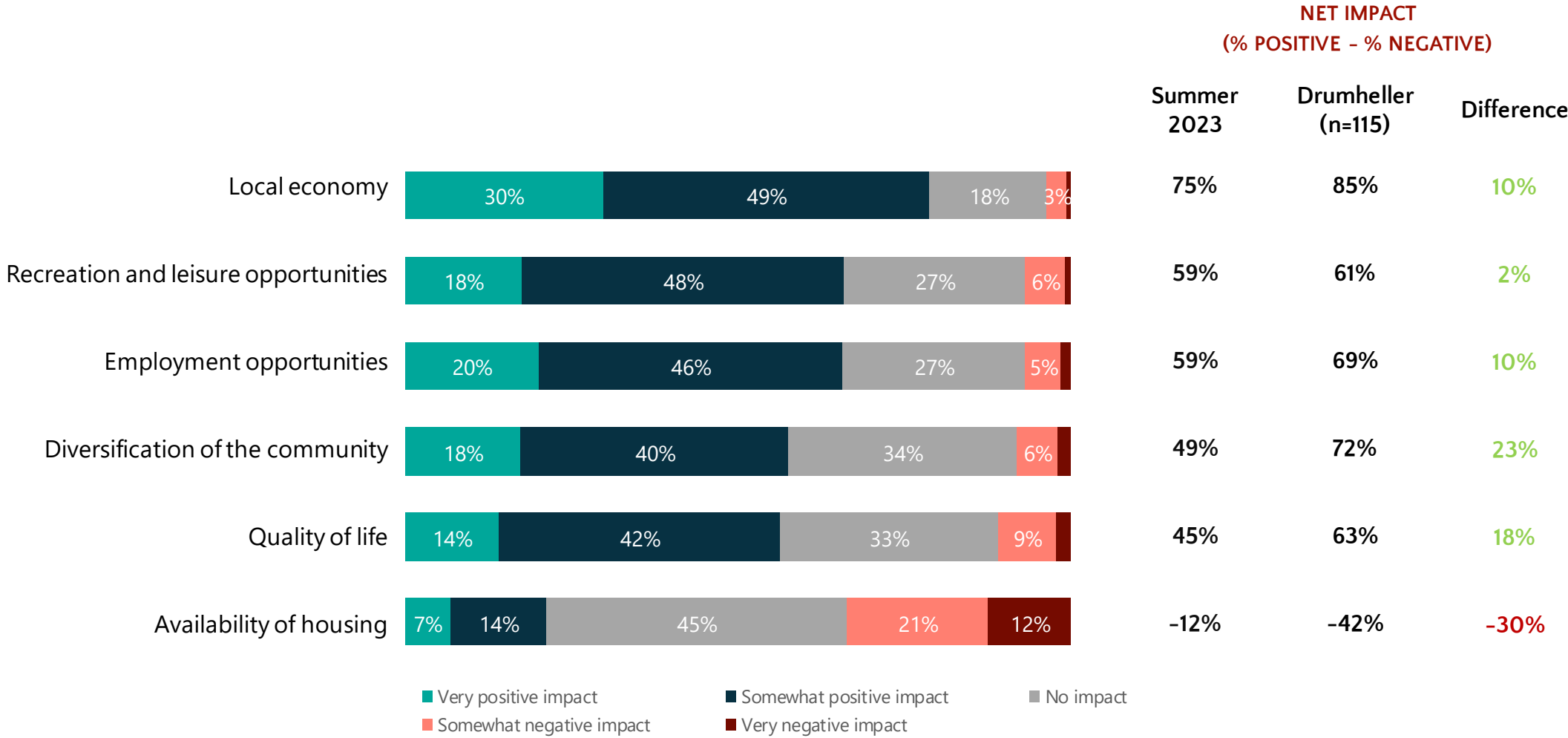
	Summer 2023	Drumheller	Difference
Canada	92%	96%	+4%
Alberta	92%	97%	+5%
Your Community	61%	79%	+18%

THERE IS GENERAL AGREEMENT OF THE POSTIVE IMPACTS OF TOURISM IN THE PROVINCE, ALTHOUGH OVERALL A SLIGHT SOFTENING IN THE RATINGS THIS YEAR. DRUMHELLER RATES TOURISM STRONGER THAN OTHER ALBERTA REGIONS.



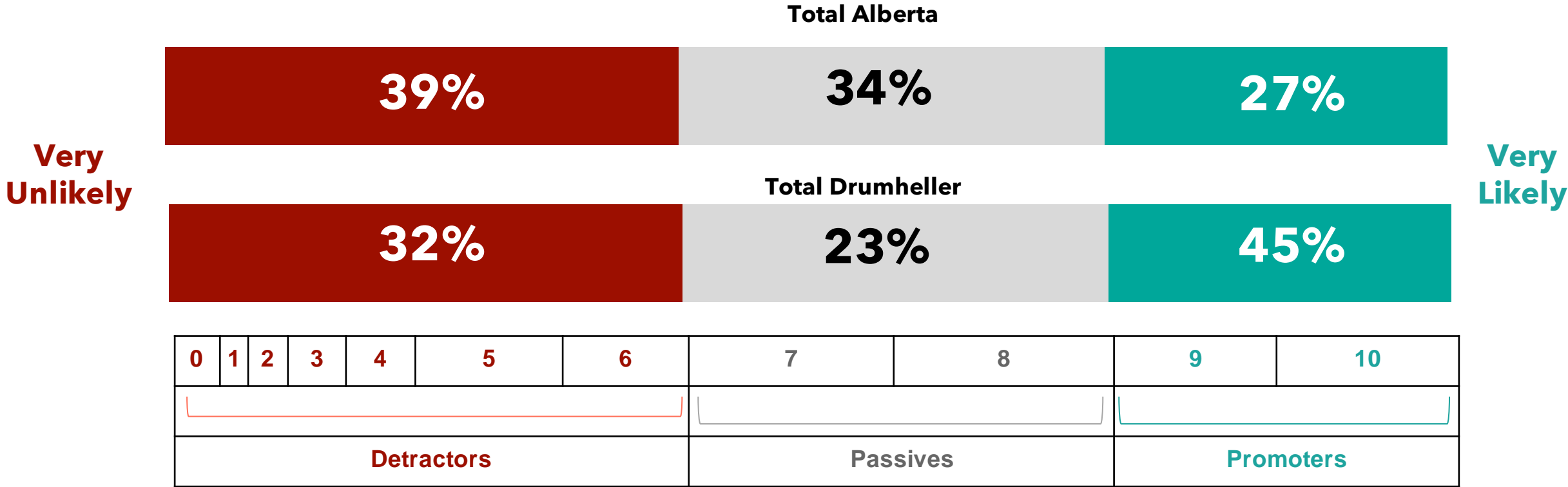
Q15. To what extent do you agree or disagree with each of the following statements about tourism in your community?
Base: All Respondents (n=793)

CONSISTENT WITH 2022, A NET IMPACT OF TOURISM IS POSITIVE IN ALMOST EVERY RESPECT, EXCEPT FOR HOUSING CONCERNS. DRUMHELLER CONTINUE TO RATE THE TOURISM HIGHER THAN OTHER RESIDENTS.



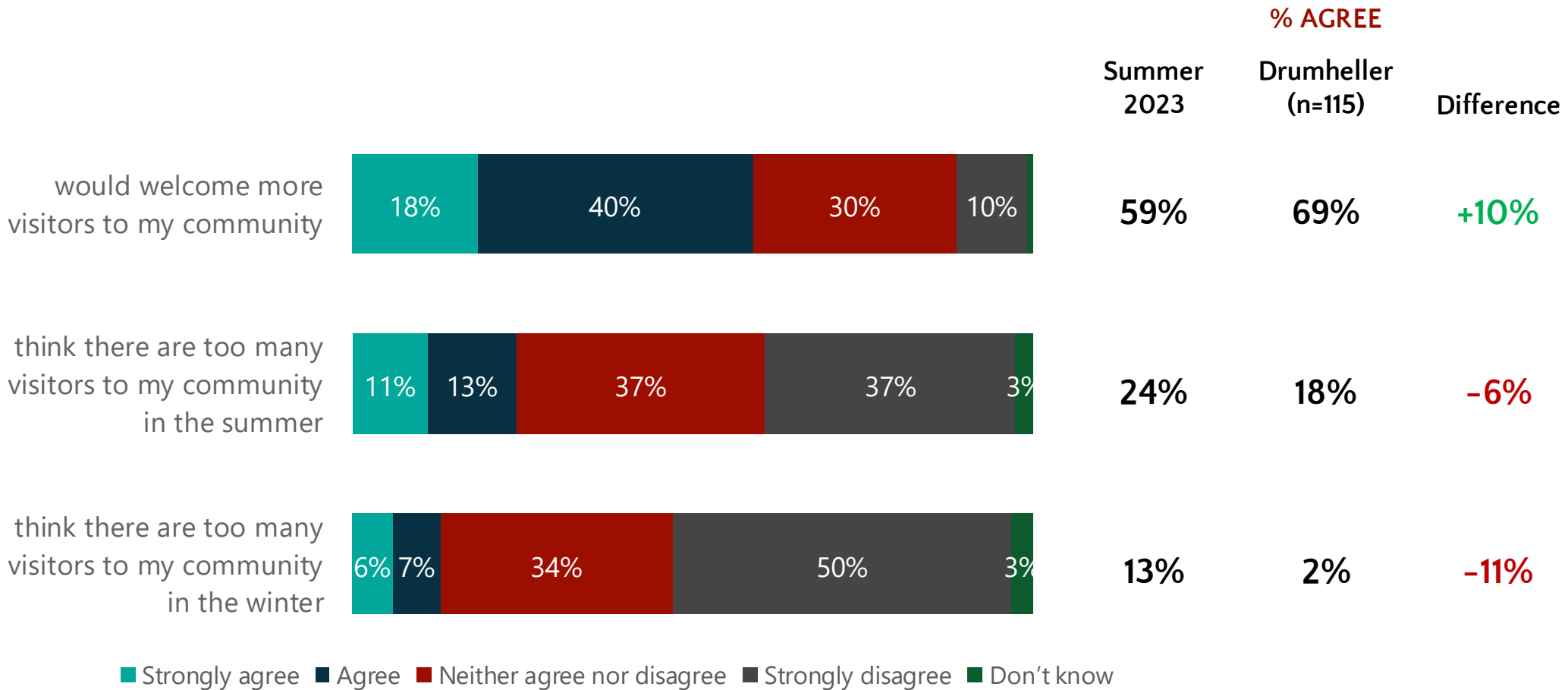
Q13. [SUMMARY] From your perspective what impact does tourism have on the following in your community? Base: All Respondents (n=793)

IN TERMS OF LIKELIHOOD TO RECOMMEND, YOY RESULTS ARE SHOWING A GENERAL INCREASE IN PROMOTERS RECOMMENDING ALBERTA AS A PLACE TO VISIT HOWEVER DRUMHELLER RANKS MORE HIGHLY



The overall **Net Promoter Score** is calculated by subtracting the % of Detractors from the overall % of Promoters. This delivers an Alberta NPS rating of **-12** (up +12 from last summer) and **+13** for Drumheller.

RESIDENTS (PARTICULARLY THOSE IN DRUMHELLER) BELIEVE THERE IS ROOM FOR MORE VISITORS IN THEIR TOWN, ESPECIALLY IN THE WINTER.



Q19. Below are some things people might say they know about their community/ tourism in their community. Please indicate how much you agree with the following statements...

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Key Take=Aways





STORY ON A PAGE - DRUMHELLER

1. Tourism matters to the Drumheller community – this is an informed audience. They get it.
2. Drumheller residents believe their community has a lot to offer and is ready to welcome new visitors year-round.
3. Is there an opportunity to widen perceptions of the reach of tourism? Tourism amenities may be seen as something for tourists more than residents.

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RESPONDENT PROFILE



RESIDENT ORIGINS

Origin	TOTAL	DRUMHELLER
Born and raised here	36%	29%
Moved here	64%	71%
Time in community		
Less than 1 year	3%	2%
1 to 5 years	23%	17%
5 to 10 years	19%	20%
10 years or more	55%	61%

CONNECTION TO TOURISM

	TOTAL	DRUMHELLER
I currently work in the travel/tourism industry	9%	17%
I do not currently work in the travel/tourism industry but I have previously	11%	17%
I do not work in the travel/tourism industry but I have friends/family that do	13%	24%
I have no personal connection to the travel/tourism industry	67%	42%

DEMOGRAPHICS

Gender	TOTAL	DRUMHELLER
Male	47%	35%
Female	50%	62%
Prefer not to answer	1%	3%
Intersex, non-binary, transgender, or two-spirit	1%	1%

Age	TOTAL	DRUMHELLER
18 to 24	10%	3%
25 to 34	19%	8%
35 to 44	19%	29%
45 to 54	18%	23%
55 to 64	17%	20%
65 to 74	11%	13%
75 or older	4%	3%

DEMOGRAPHICS

	Kids at home	TOTAL	DRUMHELLER
	Yes	27%	35%
	No	73%	65%
Diversity measures			
I am Indigenous, First Nations, Metis, Inuk (Inuit)		5%	3%
I identify as a visible minority		9%	3%
I identify as LGBTQ2S+		8%	3%
I was born outside of Canada		10%	10%
I have moved to Canada in the last 5 years		2%	0%
There are seniors over 65 in my household		19%	19%
I or someone in my home has a disability		15%	14%

DEMOGRAPHICS

Household Income	TOTAL	DRUMHELLER
Under \$50,000	13%	16%
\$50,000 but less than \$75,000	14%	15%
\$75,000 but less than \$100,000	16%	12%
\$100,000 but less than \$150,000	20%	25%
\$150,000 but less than \$200,000	12%	12%
\$200,000 but less than \$300,000	6%	8%
\$300,000 but less than \$500,000	2%	1%
\$500,000 or more	1%	0%

DEMOGRAPHICS

Education Level	TOTAL	DRUMHELLER
Some high school or less	1%	0%
Graduated high school	11%	16%
Some college or university	22%	20%
College or university graduate	47%	50%
Some postgraduate work	5%	4%
Completed post-graduate education	13%	10%