



TRAVEL DRUMHELLER 2024 RESIDENT SENTIMENT

Stone —
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TRAVEL ALBERTA

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BACKGROUND AND PURPOSE

In collaboration with Travel Alberta as part of their annual study, this work measures and evaluates resident sentiment within Drumheller, including key observations and detailed insights.

Objectives include:

- Monitor and measure the degree to which residents from Drumheller are informed about and understand the sector.
- Understand basic engagement with the sector, including level of activity and attitudes about the sector.
- Track perceived impact of the sector on key elements, such as their quality of life, local economy, and recreation/leisure opportunities.
- Gauge how residents view the economic potential of tourism today and in the future.

Approach:

- An online survey tool was developed which was then distributed through Travel Drumheller social media channels to encourage residents of the community to provide the perspectives on the local tourism industry.
- A total of n=169 completed surveys were collected during during September 12-13.
- Insights are evaluated next to the Travel Alberta Summer Pulse Check for comparative measures against provincial averages.

KEY OBSERVATIONS

CONTEXT SHAPES PERCEPTIONS

As Alberta continues to tread through rapid population growth and unpredictable weather patterns, residents continue to take advantage of the recreational and unique experiences available to them. Despite continued economic challenges, vibrancy continues to increase. These external factors have led to more uncertainty about the cost of living so it is important to recognize how these external factors will shape the perceptions residents have about the visitor economy as they attempt to manage their quality of life. These conditions are noticeable across Canada; and destinations like Drumheller are no exception.

While challenges have been disrupting residential perceptions overall, people remain positive. Despite economic challenges, like the affordability of housing, perceptions about tourism are positive, and locals understand the over value of the industry and its impact to the community.



KEY OBSERVATIONS

KNOWLEDGE OF THE INDUSTRY IS STRONG

Drumheller is home to an audience that feels very informed on the tourism industry. In fact, 88% consider themselves to be at least somewhat knowledgeable of the tourism sector—26% higher than the Alberta average. However, there is a gap in the understanding of how the visitor economy directly supports the experiences within the community. An informed audience also relate to one's willingness to recommend their destination to other and this has translated to a view that Drumheller is a community full of remarkable experiences they want to tell others about; but, like the rest of Alberta, many lack the knowledge on how tourism contributes to the experiences available.

ENGAGEMENT IS HIGH BUT RESIDENTS FEEL THERE IS A LACK OF OPPORTUNITY

Though many residents view themselves as more selective participants in the community—taking part in a few select activities or experiences—the majority are active members, frequently trying new things and enjoying what the town has to offer. While most residents from Drumheller rate these unique experiences highly, many believe there are fewer opportunities for recreation and leisure compared to the rest of the province.



KEY OBSERVATIONS

THE IMPACT OF TOURISM IS POSITIVE BUT IT COMES WITH CHALLENGES

Most Albertans would welcome more visitors into their community but residents in Drumheller are slightly more reluctant to increase visitation during the summer months. They often feel the number of visitors cause traffic congestion and increases the cost of living for locals. Affordable housing and quality of life remain a challenge for the industry, and Drumheller is no exception. However, perspectives on the impact of tourism is very positive both toward the province and to the community, particularly the sector impacts on the local economy and employment opportunities.

RESIDENTS ALSO SEE THE ECONOMIC POTENTIAL FOR THE COMMUNITY

While the challenges of tourism are similar in much of Alberta, the economic components are amplified in Drumheller. However, tourism is recognized by residents as a prominent driver for economic potential, nearly a quarter (24%) higher than the industry average. While residents do see the future economic potential for tourism, they are less likely to see how important this industry is in today's economic climate when compared to other sectors. This is likely caused by some of the economic challenges that persist. Tourism is an important economic driver, and residents really understand that it's helping support their community.

A wide-angle photograph of a suspension bridge spanning a river. Two people are walking across the bridge in the middle ground. The bridge has multiple suspension cables and a chain-link fence along its sides. The background features a line of green trees and distant hills under a blue sky with scattered clouds. The text "Detailed Results" is overlaid in the center in a large, white, sans-serif font.

Detailed Results

1

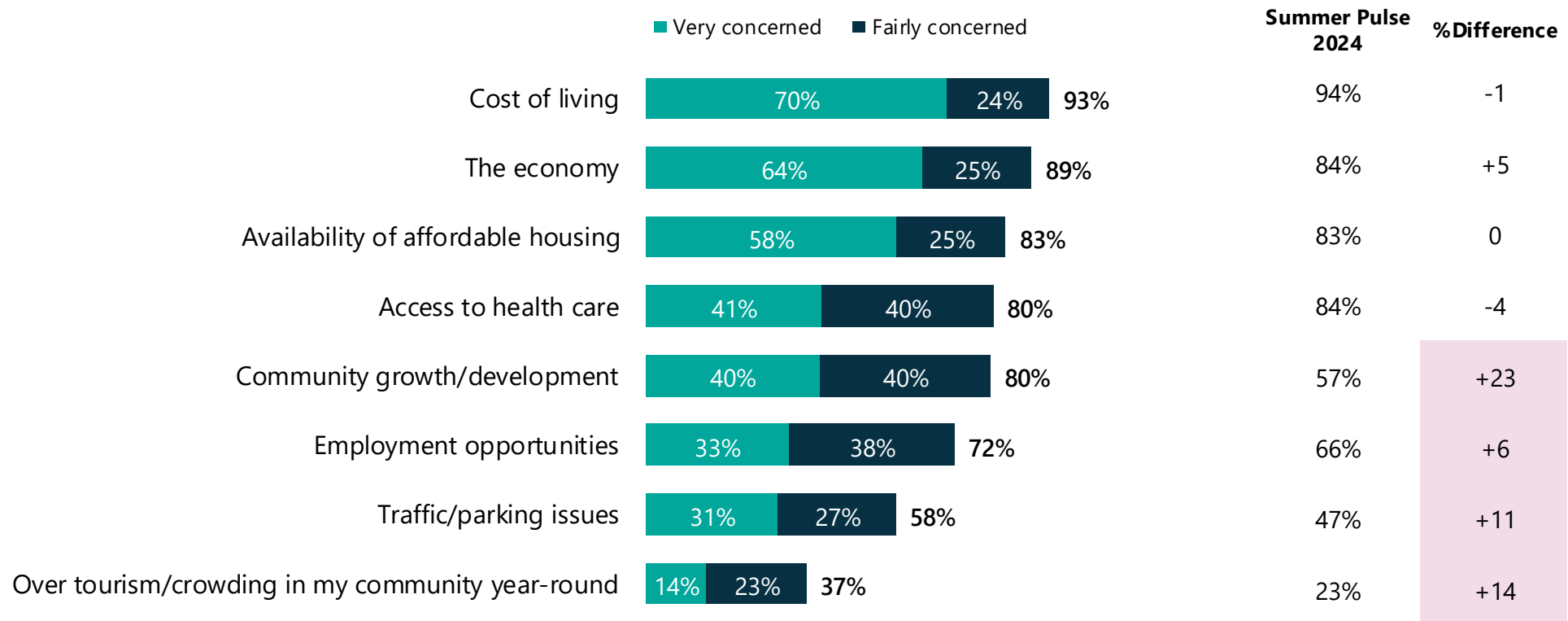
COMMUNITY CONTEXT



THE ALBERTA ISSUE AGENDA

AN INCREASE IN ALBERTA'S POPULATION HAS MADE EMPLOYMENT OPPORTUNITIES DIFFICULT TO COME BY, DESPITE AN INCREASE IN THE TOTAL JOB MARKET.

There are several notable differences between Drumheller and the Alberta average. First, community members view community growth and development as a much more significant issue (+23%), and second, over tourism—and the challenges related to it like traffic congestion—are more apparent.



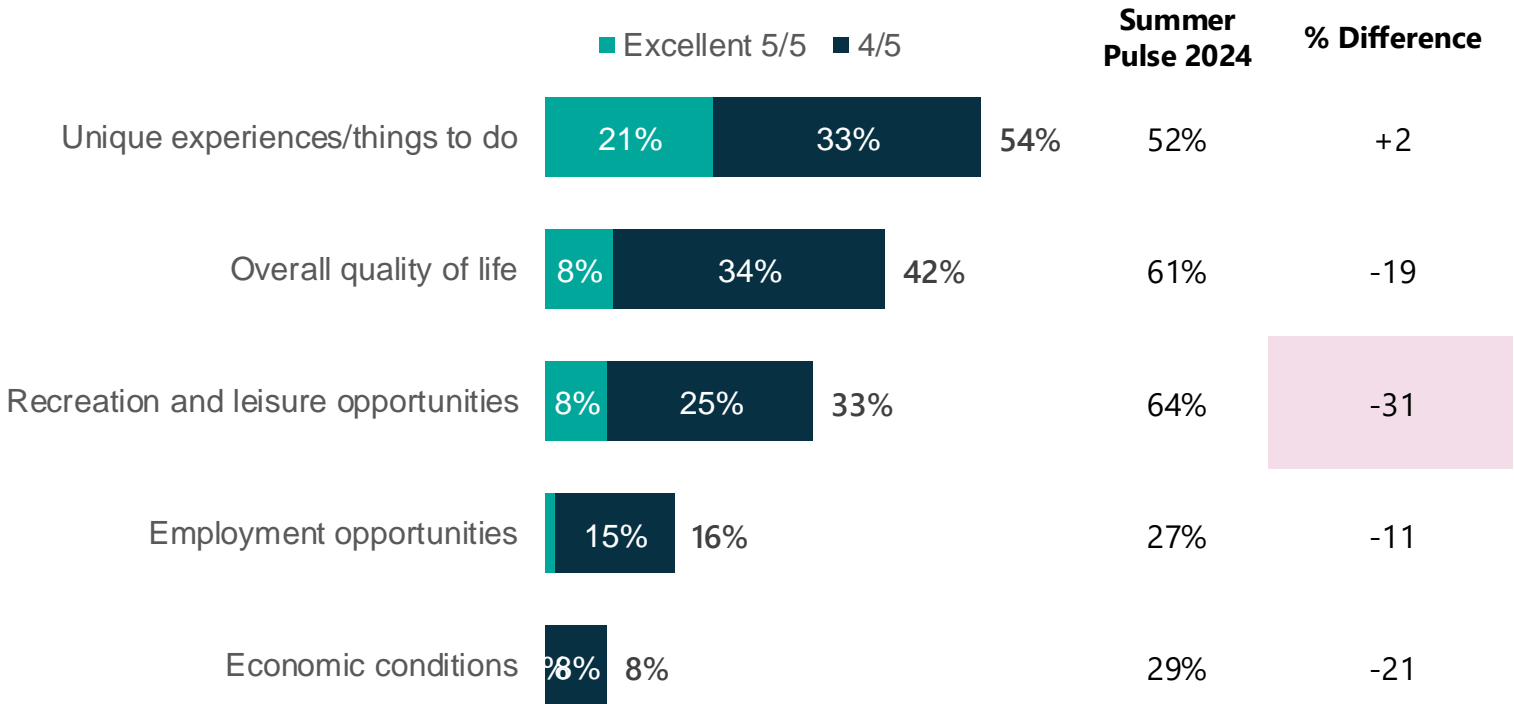


THOUGH MANY RESIDENTS DO VIEW THEMSELVES AS MORE SELECTIVE PARTICIPANTS IN THE COMMUNITY, THE MAJORITY ARE ACTIVE MEMBERS, OUTPACING THE ALBERTA AVERAGE BY 10%.

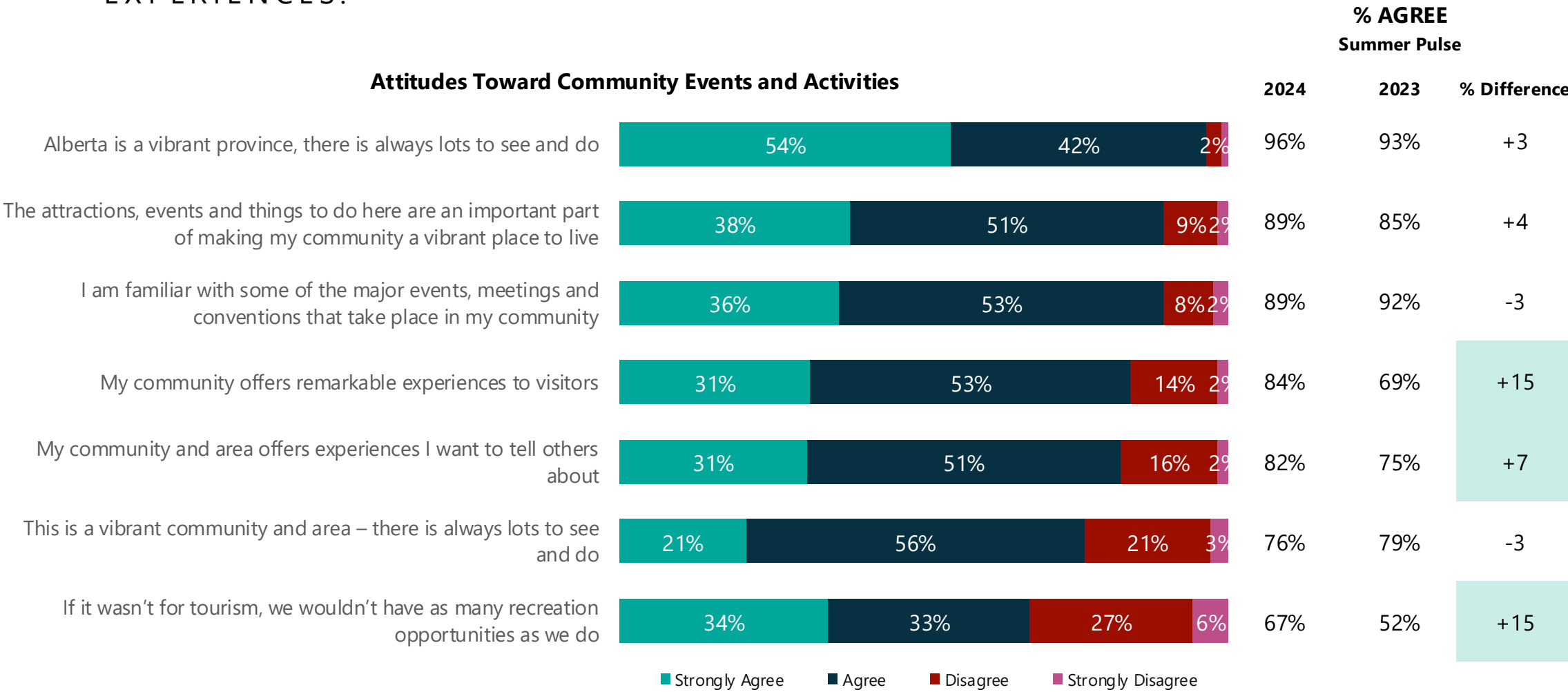
		Summer Pulse 2024	%Difference
Top 2 Box (NET) Summer Pulse 2024	<div><div></div></div> 56%	46%	+10
Very active participation (seek out activities, try new things)	<div><div></div></div> 24%	15%	+9
Frequent participation (attend quite a few, stick to the same types)	<div><div></div></div> 33%	31%	+2
Selective participation (take part in a few select activities)	<div><div></div></div> 40%	44%	-4
Guarded participation (avoid community activities)	<div><div></div></div> 4%	10%	-6



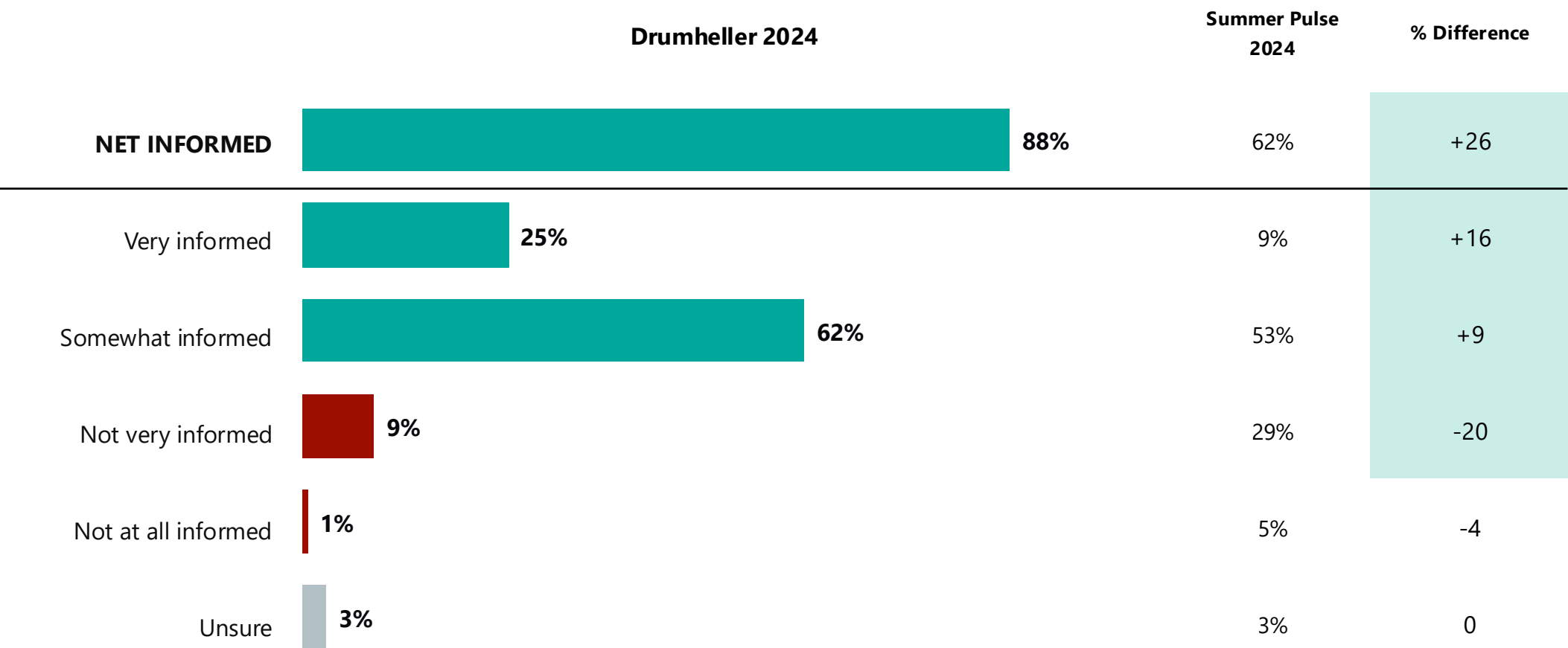
MOST RESIDENTS FROM DRUMHELLER RATE THE UNIQUE EXPERIENCES IN THE COMMUNITY HIGHLY. HOWEVER, MANY BELIEVE THERE ARE FEWER OPPORTUNITIES FOR RECREATION AND LEISURE COMPARED TO THE REST OF THE PROVINCE.



RESIDENTS VIEW DRUMHELLER AS A COMMUNITY FULL OF REMARKABLE EXPERIENCES AND EXPERIENCES THEY WANT TO TELL OTHERS ABOUT, BUT LIKE THE REST OF ALBERTA, MANY LACK THE KNOWLEDGE ON HOW TOURISM SUPPORT THESE EXPERIENCES.



DRUMHELLER IS HOME TO AN AUDIENCE THAT FEELS VERY INFORMED ON THE TOURISM INDUSTRY, 26% HIGHER THAN THE ALBERTA AVERAGE. THERE IS ALSO EVIDENCE THAT THOSE WHO ARE MORE INFORMED ARE ALSO MUCH MORE LIKELY TO RECOMMEND THEIR DESTINATION TO OTHERS.

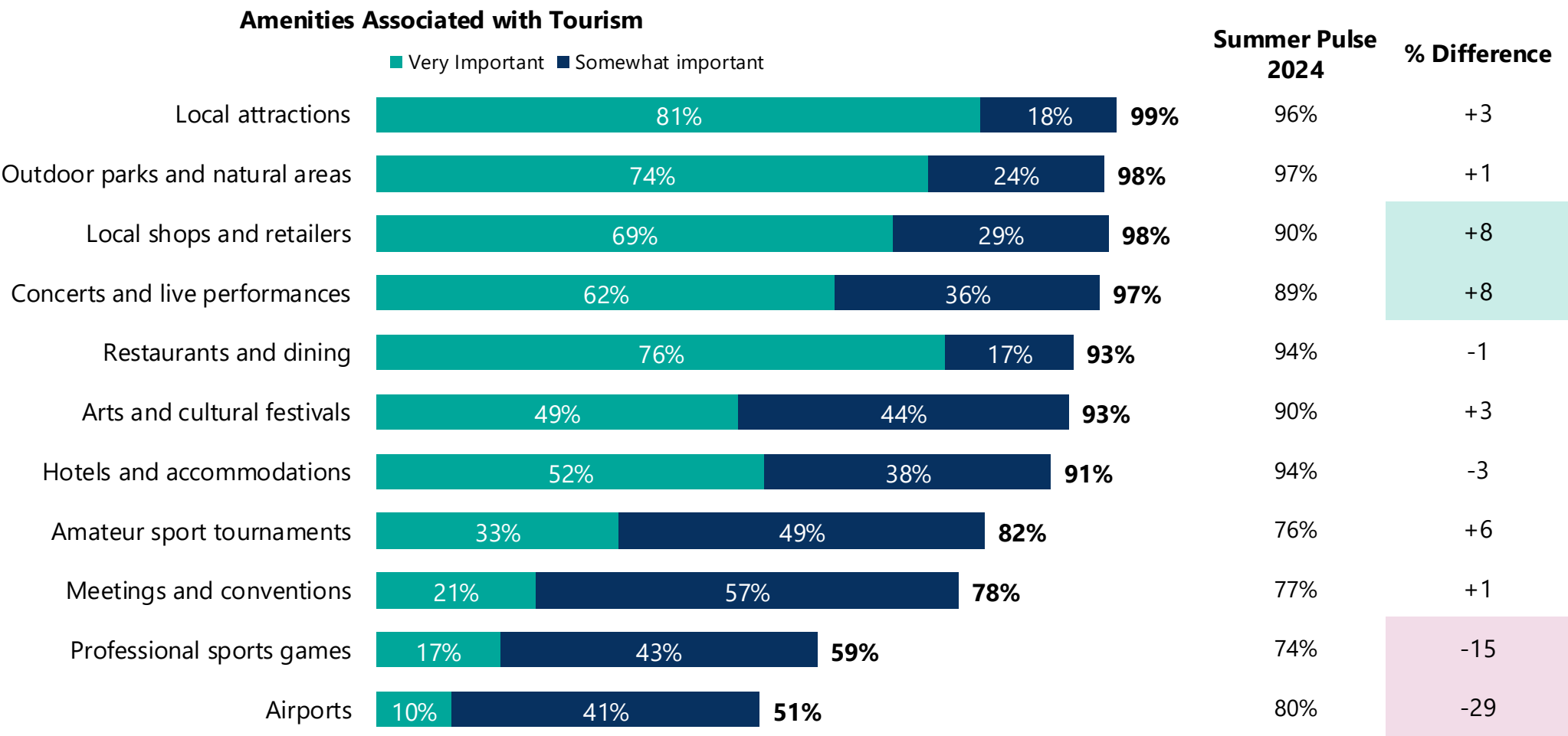


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ACTIVITY LEVELS



RESIDENTS FROM DRUMHELLER RECOGNIZE THE IMPORTANCE OF TOURISM AMENITIES, BUT DESPITE PROXIMITY TO THE CALGARY TERMINAL, ONLY HALF SEE THE IMPORTANCE OF AIRPORTS IN DRIVING VISITATION.





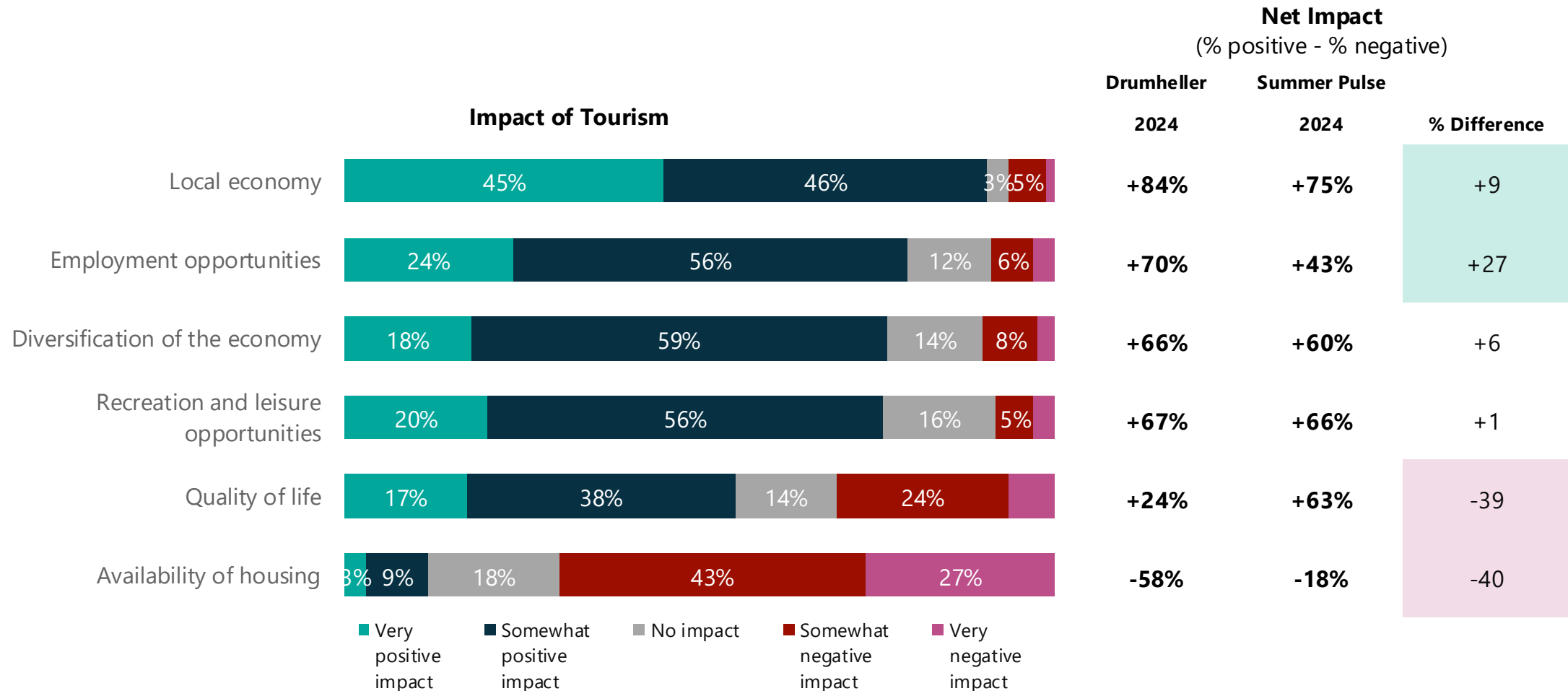
IMPORTANCE OF TOURISM

AS A MAJOR ECONOMIC DRIVER FOR THE CITY, RESIDENTS FROM DRUMHELLER REALLY UNDERSTAND THE IMPORTANCE OF THIS INDUSTRY, NOT ONLY TO THEIR COMMUNITY, BUT TO THE REST OF CANADA.

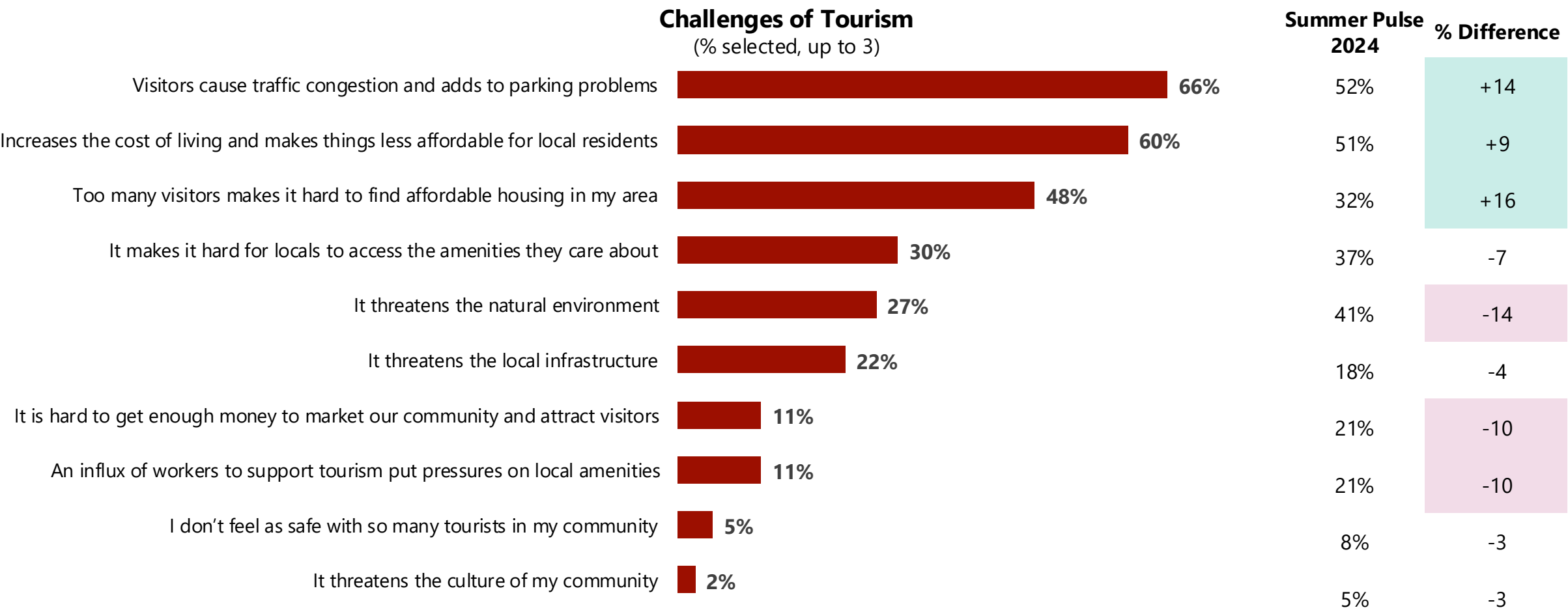
MUCH OF ALBERTA TENDS TO STRUGGLE IN THEIR UNDERSTANDING HOW TOURISMS CONTRIBUTES TO THEIR OWN COMMUNITY

	Drumheller	Summer Pulse	
	2024	2024	% Difference
MY COMMUNITY	94%	66%	+28
ALBERTA	96%	95%	+1
CANADA	92%	94%	-2

AFFORDABLE HOUSING AND QUALITY OF LIFE REMAIN A CHALLENGE FOR THE INDUSTRY, AND DRUMHELLER IS NO EXCEPTION. PERSPECTIVES ON TOURISMS IMPACT TO THE LOCAL ECONOMY AND EMPLOYMENT OPPORTUNITIES ARE POSITIVE.



WHILE THE CHALLENGES OF TOURISM ARE SIMILAR IN MUCH OF ALBERTA, THE ECONOMIC COMPONENTS ARE AMPLIFIED IN DRUMHELLER. RESIDENTS FEEL THE NUMBER OF VISITORS CAUSE TRAFFIC CONGESTION AND INCREASES THE COST OF LIVING FOR RESIDENTS.



3

IMPACT OF TOURISM SECTOR

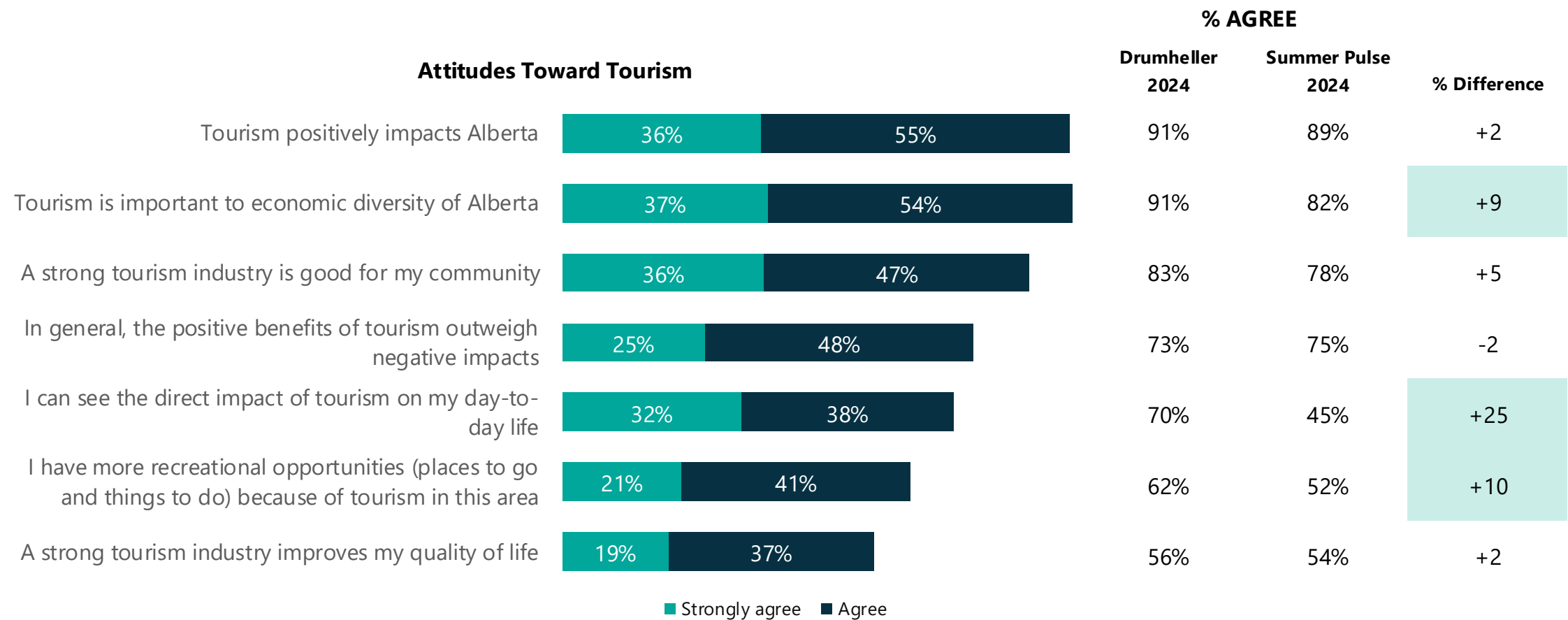




THE IMPACTS OF NATURAL DISATER, LIKE WILDFIRES, HAVE STARTED TO PLAY A ROLE IN VISITATION, HOWEVER, DRUMHELLER HAS SEEN LESS OF THIS IMPACT.

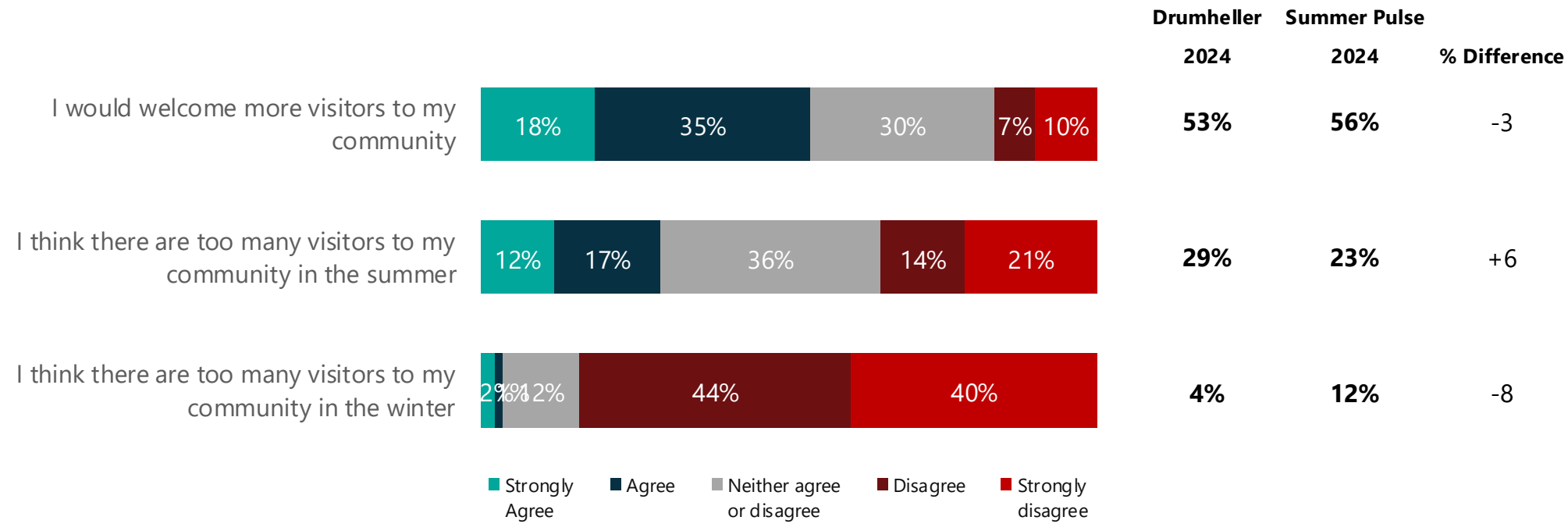
Impact of Natural Disasters		Summer Pulse 2024	% Difference
Net Positive Impact	<div><div></div></div> 15%	4%	+11
Very significant positive impact	<div><div></div></div> 2%	0%	+2
Somewhat positive impact	<div><div></div></div> 13%	3%	+10
No impact	<div><div></div></div> 65%	47%	+18
Fairly negative impact	<div><div></div></div> 16%	34%	-18
Very significant negative impact	<div><div></div></div> 4%	15%	-11
Net Negative Impact	<div><div></div></div> 20%	49%	-29

ALTHOUGH THERE ARE INDUSTRY CHALLENGES RESIDENTS DEAL WITH, THEY ULTIMATELY SEE THE VALUE OF THE INDUSTRY AND HOW IT CONTRIBUTES TO NOT ONLY THE PROVINCE, BUT TO THEIR DAY TO LIFE.





MOST ALBERTANS WOULD WELCOME MORE VISITORS INTO THEIR COMMUNITY. DRUMHELLER IS SLIGHTLY MORE RELUCTANT TO INCREASE VISITATION DURING THE SUMMER.



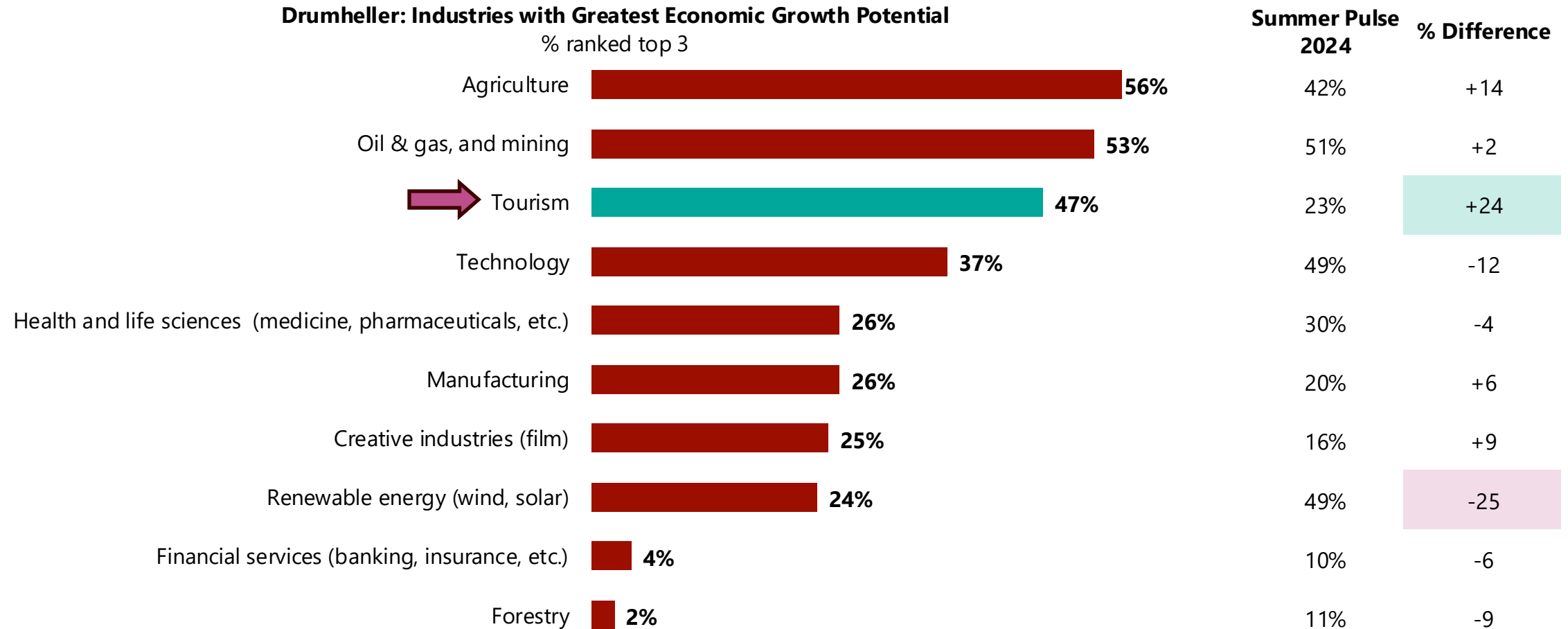


DRUMHELLER’S NET PROMOTOR SCORE—ONE’S WILLINGNESS TO RECOMMEND THEIR DESTINATION—HAS REMAINED STABLE SINCE 2023. RESIDENTS CONTINUE TO HAVE HIGHER RATE OF ADVOCACY THEN THE ALBERTA AVERAGE.

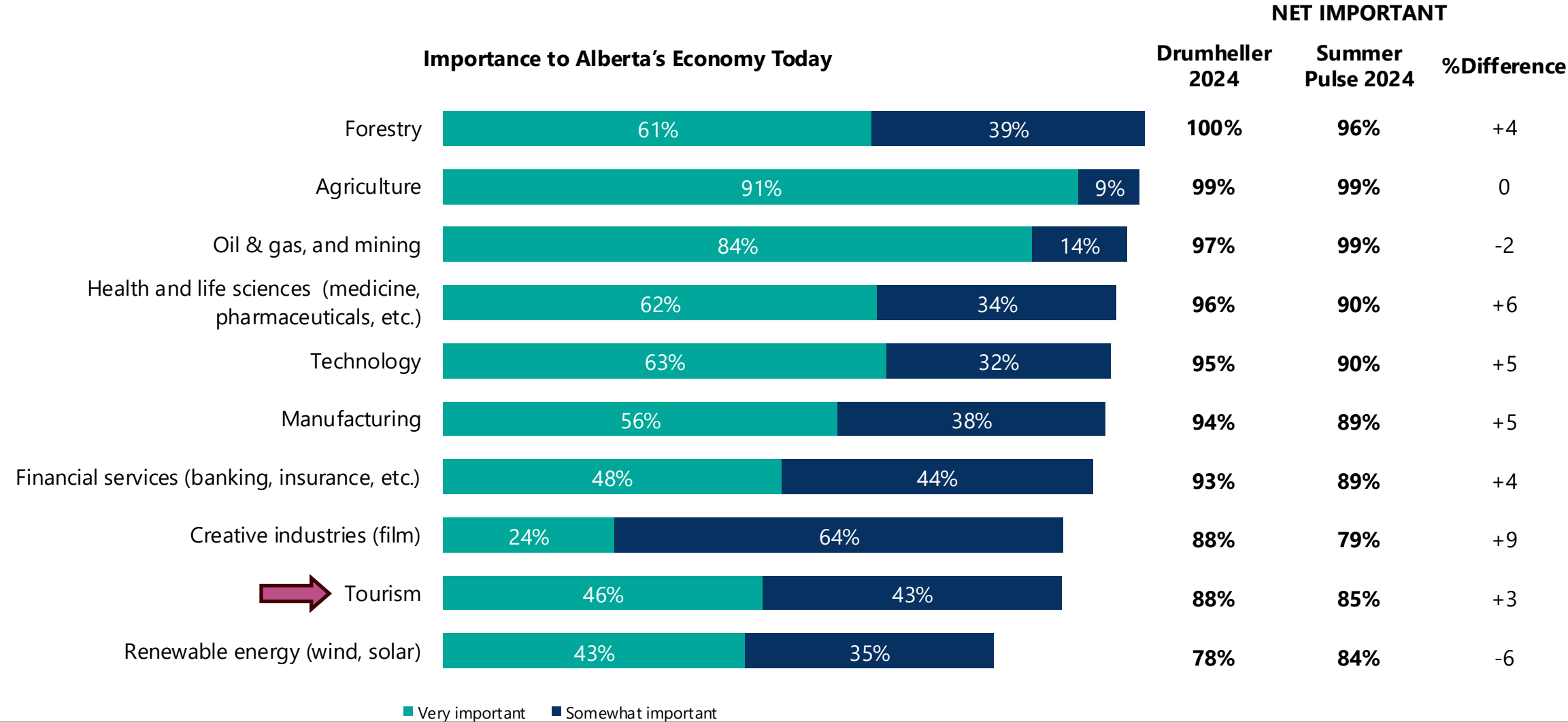
NET PROMOTOR SCORE

	Drumheller 2024	Summer Pulse	% Difference
Promoters	42%	27%	+15%
Passives	28%	38%	-10%
Detractors	30%	35%	-5%
NPS	+12	-8	+20

TOURISM IS RECOGNIZED BY RESIDENTS AS A PROMINENT DRIVER FOR DRUMHELLER'S ECONOMIC POTENTIAL, NEARLY A QUARTER (24%) HIGHER THAN THE INDUSTRY AVERAGE.



WHILE RESIDENTS DO SEE THE FUTURE ECONOMIC POTENTIAL FOR TOURISM, THEY ARE LESS LIKELY TO SEE HOW IMPORTANT THIS INDUSTRY IS IN TODAY'S ECONOMIC CLIMATE WHEN COMPARED TO OTHER SECTORS.



Q7. Please rate the importance of these industries to Alberta's economy today.
Base: Respondents who believe each industry has greatest growth in Q6 (n varies)

A wide-angle photograph of an outdoor theater. In the foreground, rows of wooden bleachers are arranged in a semi-circle, facing a stage. The stage is a raised wooden platform with a curved front. A person stands on the stage, holding a large, light blue fabric. Behind the stage is a large, light-colored stone building with multiple levels, arched windows, and a balcony. The building is set against a backdrop of steep, layered hills. The sky is clear and blue.

Demographics



RESIDENT ORIGINS

Origin

Born and raised here	30%
Moved here	70%

Came from

Another part of Alberta	63%
Another part of Canada	33%
Another part of the world	4%



Time in community

Less than 1 year	3%
1 to 5 years	17%
5 to 10 years	10%
10 years or more	70%



CONNECTION TO TOURISM

Connection to tourism

I currently work in the travel/tourism industry	18%
I do not currently work in the travel/tourism industry but I have previously	21%
I do not work in the travel/tourism industry but I have friends/family that do	25%
I have no personal connection to the travel/tourism industry	36%

DEMOGRAPHICS

		Kids at home				Income	
Gender		Yes	44%			Under \$50,000	10%
Male	24%	No	56%			\$50,000 but less than \$75,000	12%
		Diversity measures				\$75,000 but less than \$100,000	11%
Female	70%	I am Indigenous, First Nations, Metis, Inuk (Inuit)	7%			\$100,000 but less than \$150,000	12%
Age		I identify as a visible minority	4%			\$150,000 but less than \$200,000	12%
18 to 24	1%	I identify as LGBTQ2S+	4%			\$200,000 but less than \$300,000	7%
25 to 34	12%	I was born outside of Canada	3%			\$300,000 but less than \$500,000	1%
35 to 44	33%	I have moved to Canada in the last 5 years	1%			Prefer not to answer	34%
45 to 54	18%	There are seniors over 65 in my household	19%				
55 to 64	17%	I or someone in my home has a disability	16%				
65 to 74	15%	None of the above	50%				
75 or older	1%	Prefer not to answer	11%				

THANK YOU

IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT JASON LETWIN

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