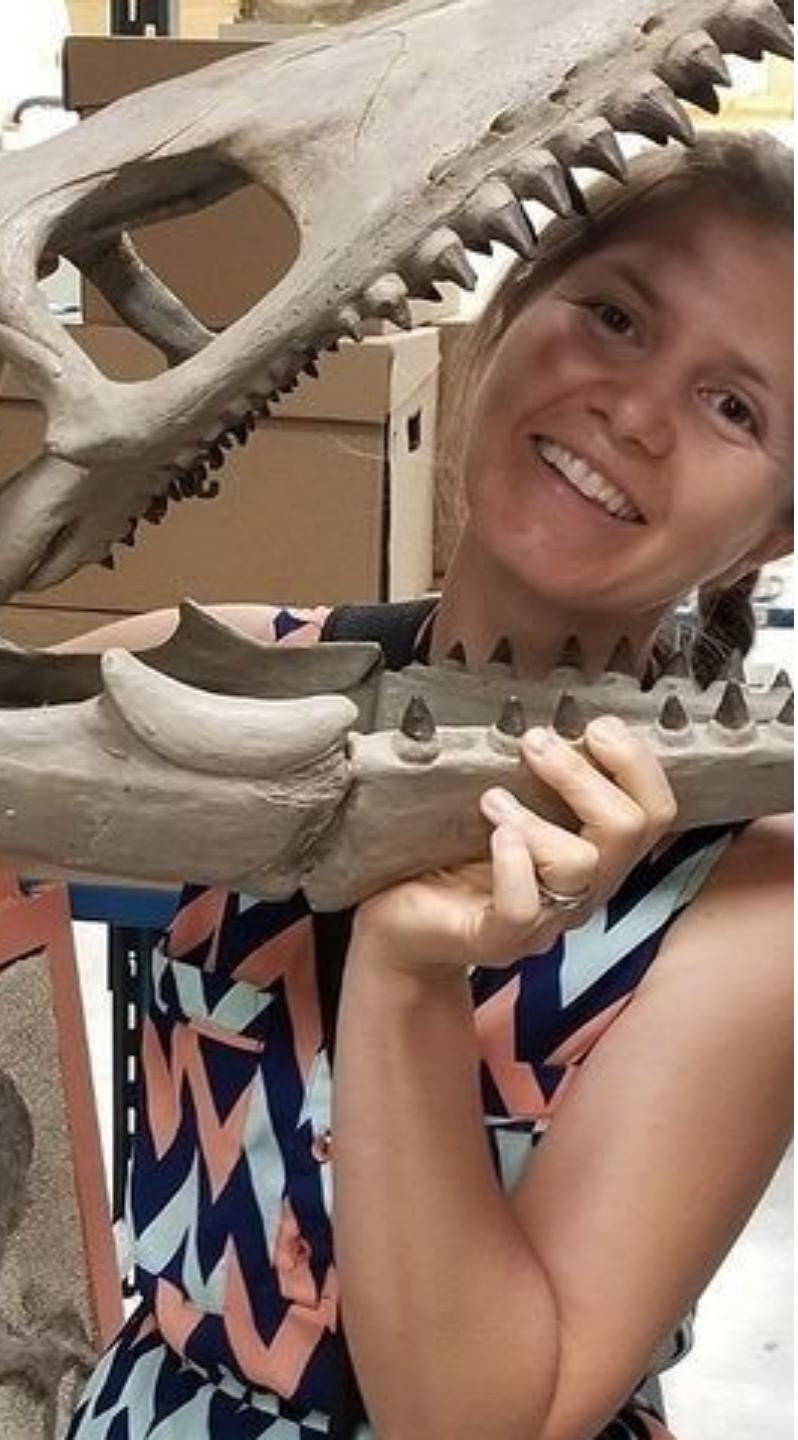


TRAVEL ALBERTA: 2023 RESIDENT SENTIMENT

SUMMER 2023 / DRUMHELLER

October 2023



CONTEXTS

Resident perceptions of the tourism sector are continually shaped by external contexts. The 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:** While media attention often covers the overall price of oil as a marker for economic health in the province, this is more a benchmark for government and corporate revenues than it is for consumer sentiment. Unemployment in the province has remained relatively steady since our last round of research and sits at 5.7% (+0.2% since last year, +0.2% compared to the rest of Canada).
- **Availability of affordable housing:** In addition to the overall economic conditions, Albertans are highly concerned about the availability of affordable housing which has been mentioned throughout the news and social media consistently over the past year. This year we've seen extreme low vacancy rates across the province, but particularly in Calgary and Edmonton. When coupled with the overall economic conditions, this leads to Albertan's spending less money on experiences, including within province tourism.
- **Tourism sector statistics continue to show a post-COVID rebound:** Final numbers on visitation, spending and hotel occupancy have yet to be tallied but early indications continue to show a significant rebounding after COVID years. This too will impact perceptions, particularly in smaller areas with substantial tourism (e.g., the Rockies) who are beginning to recall the negative implications and nuisances of tourists, which had previously been forgotten.



PURPOSE OF THE WORK

The tourism sector and industry organizations have evolved in recent years from pure destination marketing organizations to a more robust approach that acknowledges the importance of developing the destination for the benefit of tourists as well as residents. The ultimate success of the sector hinges on its wider impact on life in the province and not merely on its ability to attract visitors. **The purpose of this province-wide research is to track resident sentiment towards the tourism sector in Alberta and inform decisions about destination development and management.** Specific objectives include:

- Monitor and Measure the degree to which Albertans 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 like quality of life, local economy and recreation/leisure opportunities.



THE APPROACH

Online and phone interviews were conducted in key markets across Alberta between August 28th and September 25th, 2022. This year more responses were collected in the rural area for a separate report for Drumheller. Results weighted by age and gender within region and size of region within province.

	TOTAL	ONLINE	SOCIAL
Calgary	n=203	n=203	-
Edmonton	n=200	n=200	-
Rockies	n=86	n=86	
Rural Alberta	n=304	n=232	n=72
Total	n=793	n=721	n=72

PLEASE NOTE: "Summer 2023" refers to this entire wave of research, Alberta wide.



STORY ON A PAGE – ALBERTA WIDE

1. Opportunities still exist to make sector more personally relevant to Albertans

On the whole, broader perceptions of the sector and its importance are very positive. We continue to see perceptions soften when thinking closer to home (about their own community) or impacts/influence on themselves personally. This is particularly apparent in Edmonton and Calgary where the tourism sector is not the primary sector, although both cities offer tourism attractions. There is room to keep growing personal connections and knowledge of the industry in these areas to help strengthen sentiment by reminding Albertans of the benefits that tourism can support.

2. Tourist nuisances continue to rise for the Rockies

Residents of the Rockies are topping the charts with their perceptions of the negatives of tourism compared to the rest of Alberta. While they understand and appreciate the value and importance that tourism brings to their region, their day-to-day life experiences with tourism (e.g., increased congestion, access to affordable housing, and Albertan access to attractions) remains challenging. This is not surprising, as the Rockies handle the bulk of Alberta tourism; however, dispersing the tourism throughout the province would decrease their feelings of being overcapacity.

3. Albertans are participating in the community, although selectively

Relative to COVID times and winter ratings, Albertans continue to participate in their communities, with those in the Rockies most likely to actively seek activities, while the remainder of the region is more selective in what they chose to participate in. This is likely due in part to the increasing costs of experiences which is coupled with the price pressures that Albertans are experiencing, ultimately forcing Albertans to be more selective as a cost savings measure.



STORY ON A PAGE – DRUMHELLER

1. Tourism matters to the Drumheller community

Relative to the rest of Alberta (especially the Rockies), those from Drumheller are more likely to believe tourism positively impacts their day to day lives (+21%), improving their quality of life (+21%) and ultimately, they believe the tourism industry is important to the Drumheller community (+18%). Additionally, they rated the tourism industry as a whole, with the top growth potential in Alberta (36% vs. 13%).

2. Drumheller residents believe their community has a lot to offer and is ready to welcome new visitors year-round.

Drumheller residents are more likely than other Alberta regions to recommend their community to visitors (e.g., NPS +13 to -12) and believe the community can offer remarkable experiences to visitors (+11%). Furthermore, they are very open to welcoming more visitors (+10%), any time throughout the year. This indicates that the residents of Drumheller appreciate the impact tourism in the area and are eager for more.

1

COMMUNITY CONTEXT

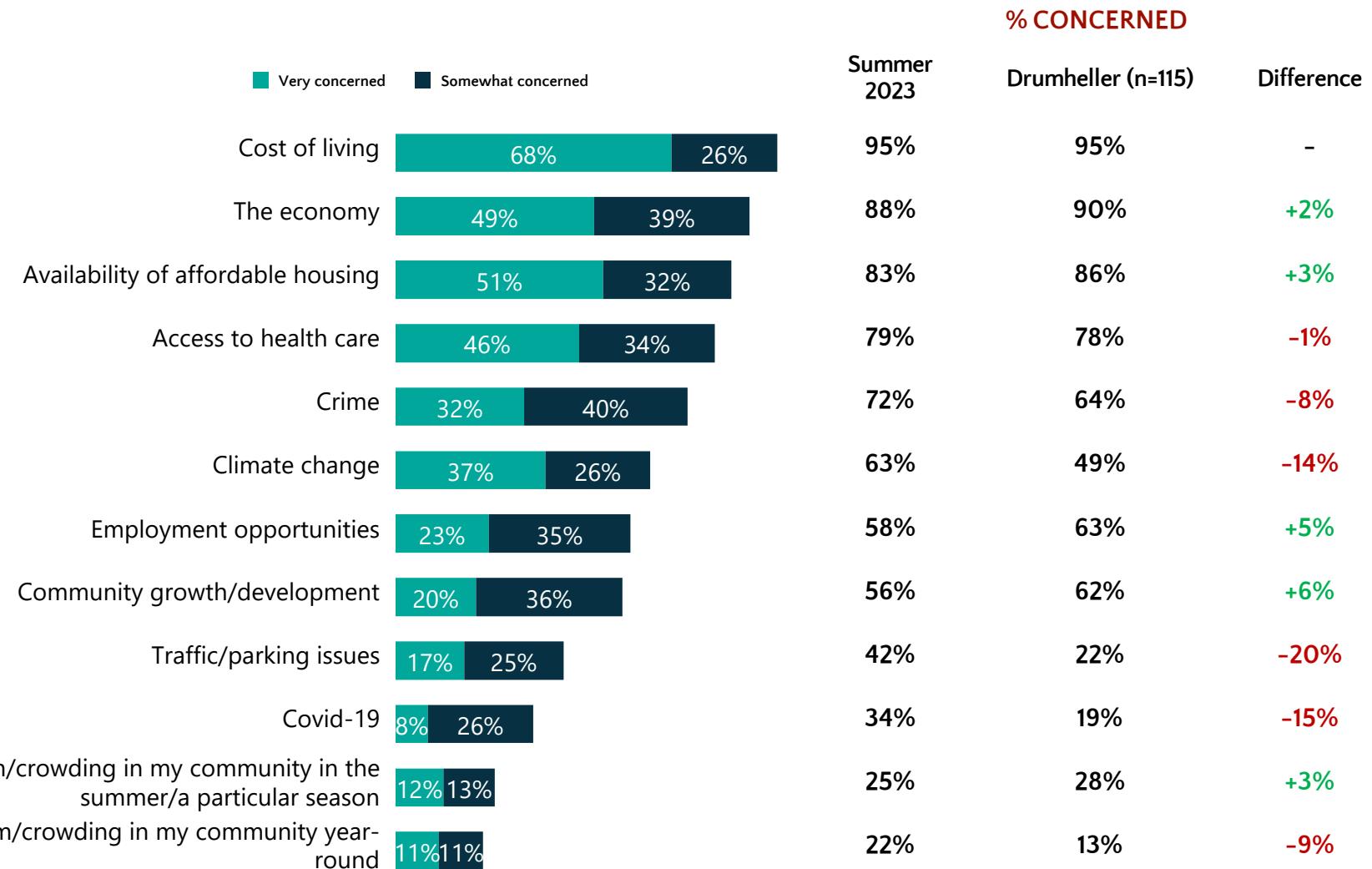


THE ALBERTA ISSUE AGENDA WILL SHIFT IN RESPONSE TO CONTEXTS

Albertans concern for various issues remains steady late in the summer. The cost of living, the economy and the affordability of housing are at the top of the issue agenda as things Albertans are most worried about it.

Concerns about access to health care and crime are slowly trending up over time.

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



2

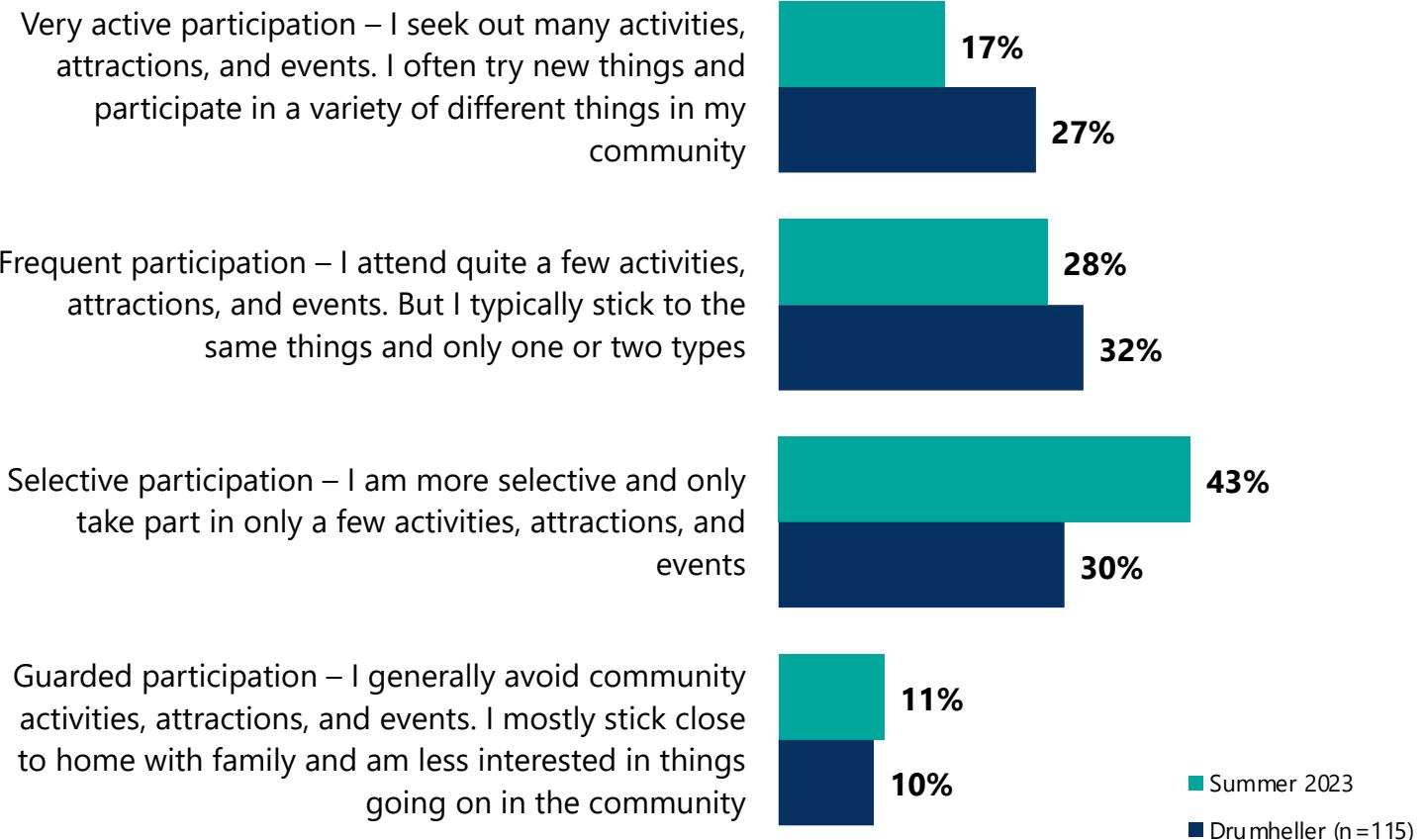
ACTIVITY LEVELS



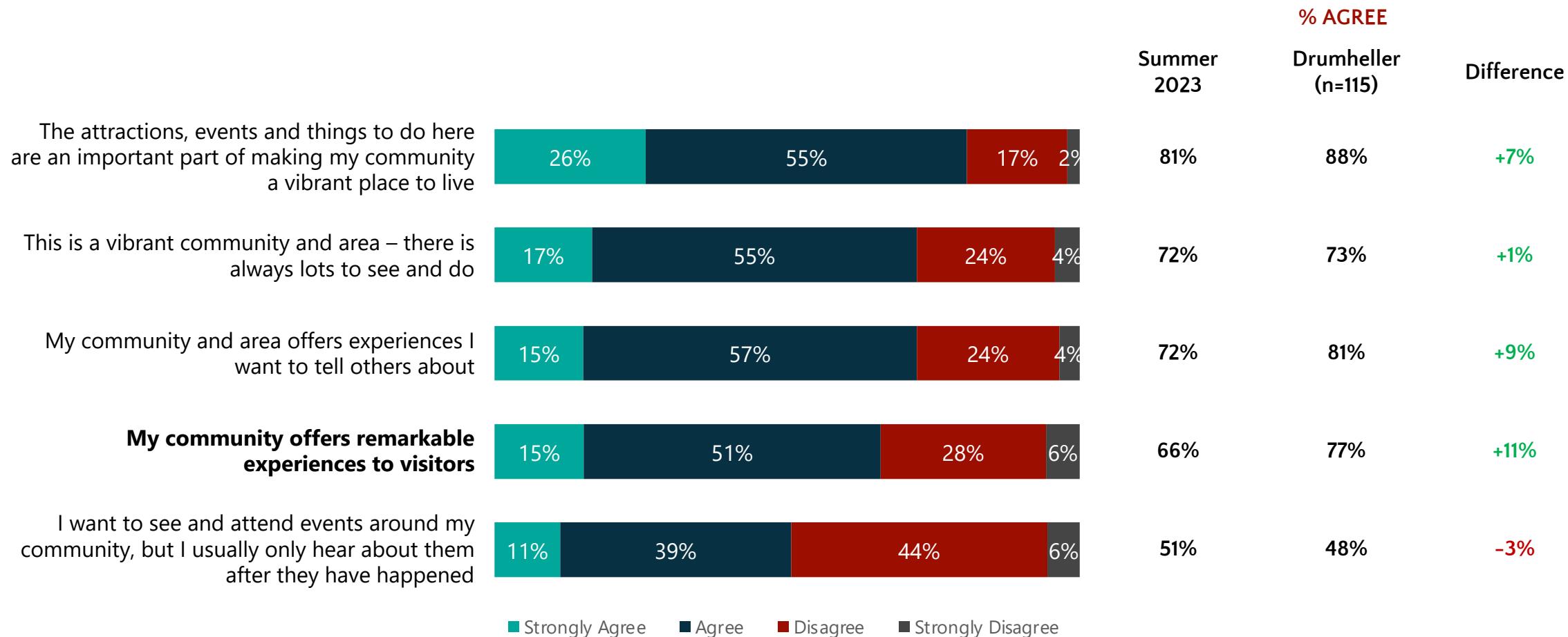


ALBERTANS ARE SELECTIVE IN THE ACTIVITIES THEY PARTICIPATE IN, WHEREAS DRUMHELLER IS CONSIDERS THEMSELVES SIGNIFICANTLY MORE ACTIVE

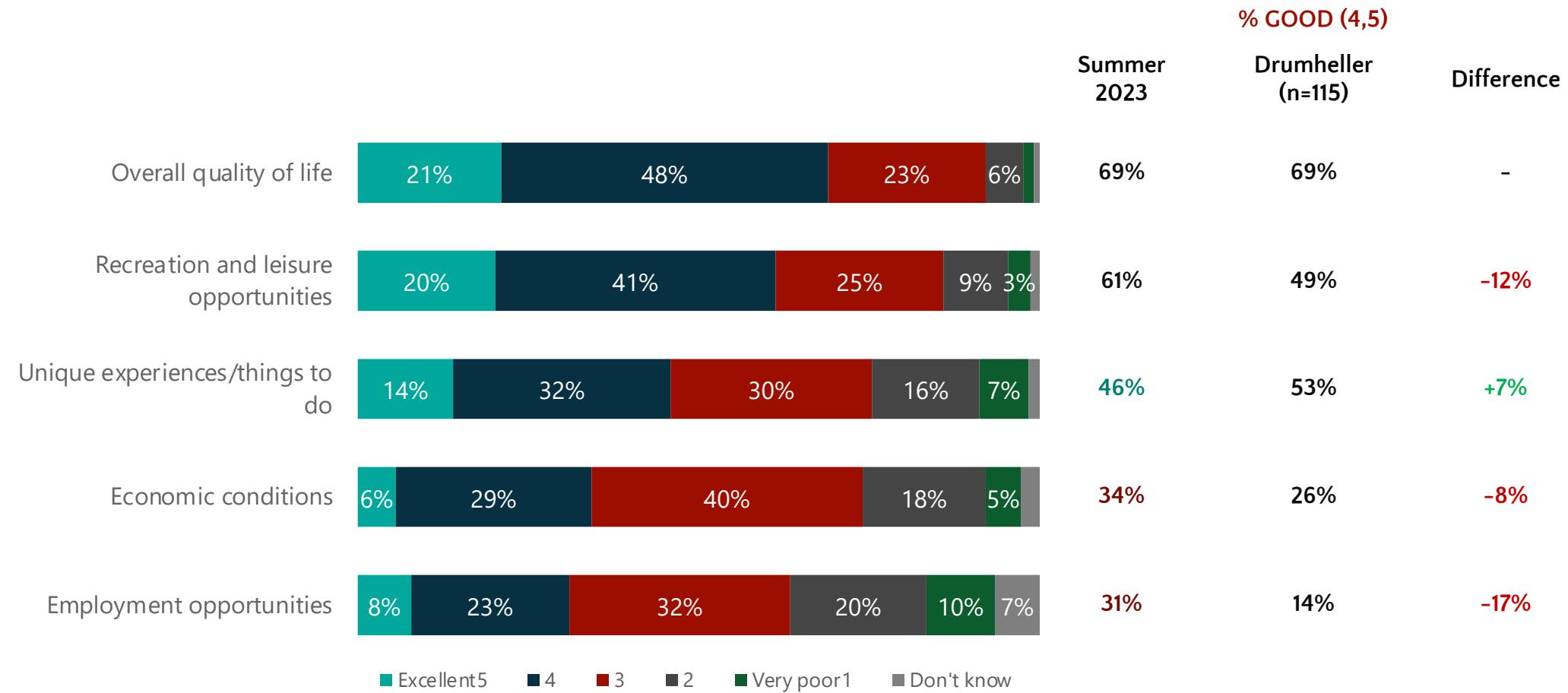
COMMUNITY PARTICIPATION



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



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



3

IMPACT OF TOURISM SECTOR





IMPORTANCE OF TOURISM

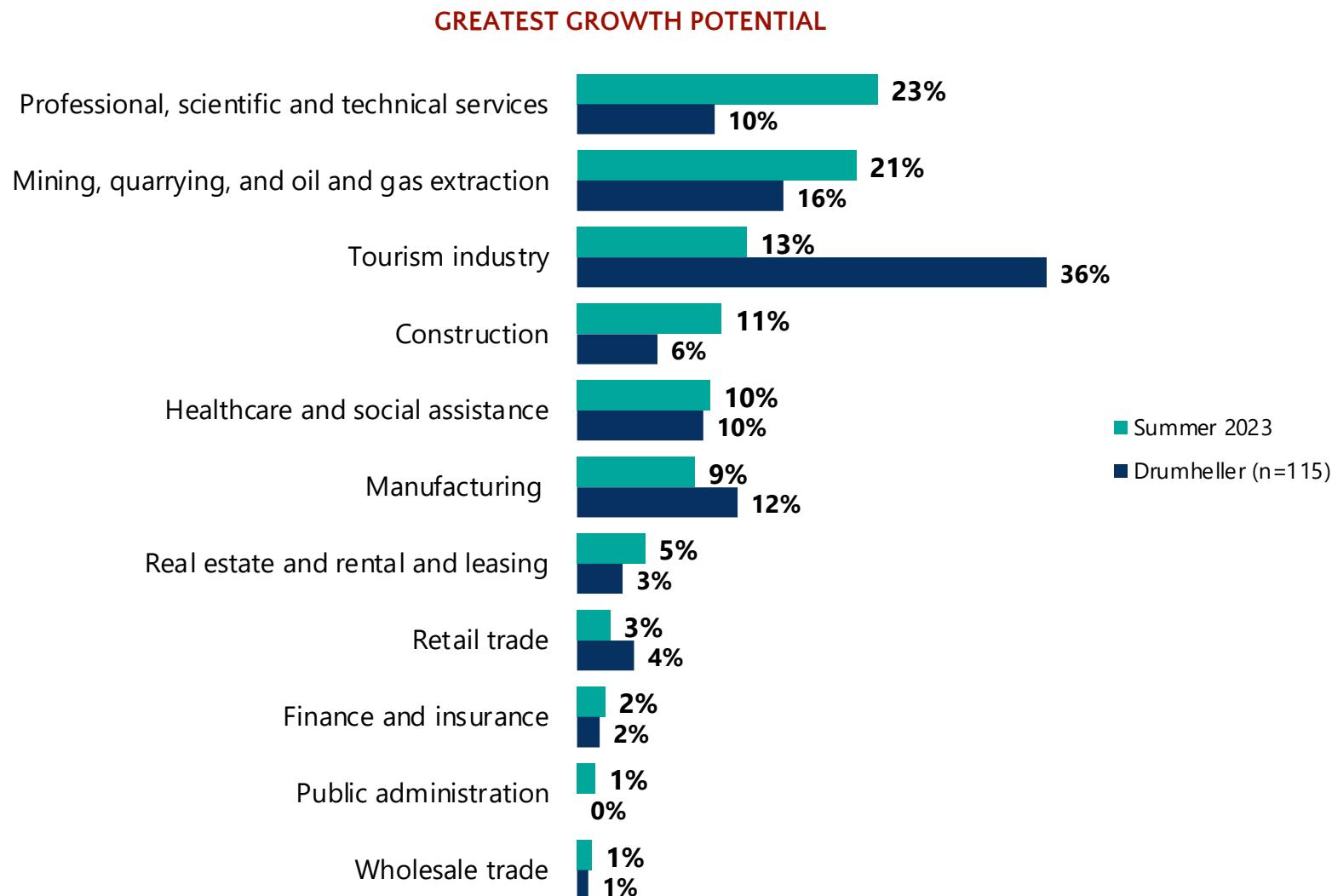
IMPORTANCE IS ESSENTIALLY UNCHANGED

Despite the cost of living and economic concerns, the province continues to be unmoved over the past year in their assessment of the importance of the Tourism sector. Many viewed tourism within the top three industries with the greatest growth potentials of all industries.

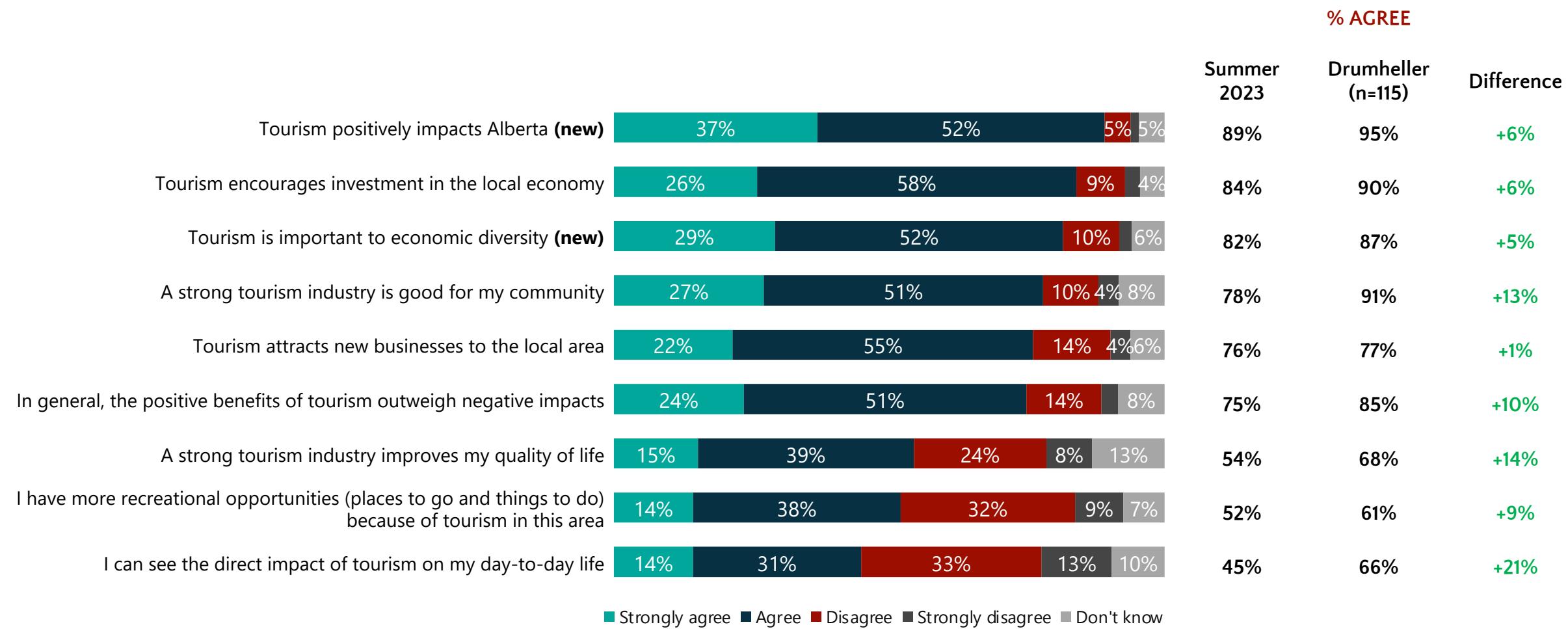
Drumheller in particular rated both the tourism industry and the impact of tourism on their community significantly higher than the rest of the regions.

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

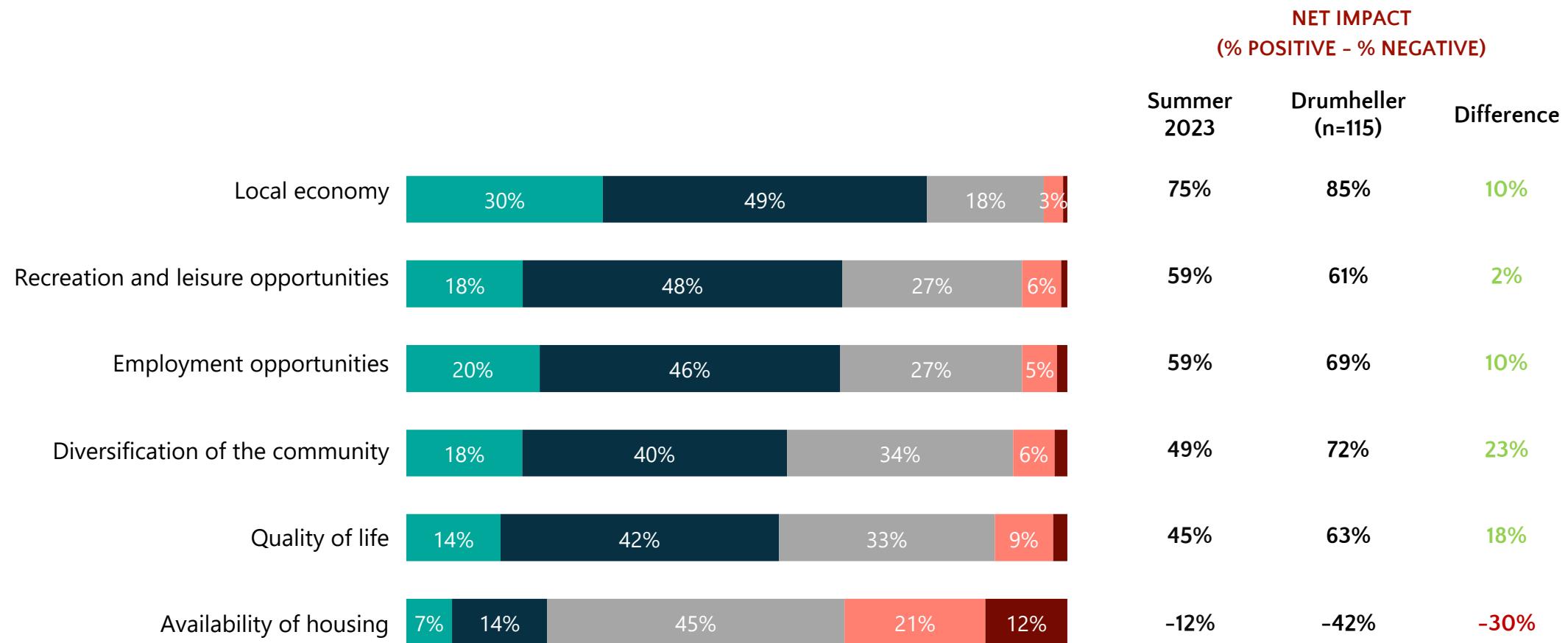
INDUSTRIES WITH THE GREATEST GROWTH POTENTIAL INCLUDE PROFESSIONAL SERVICES, OIL & GAS RELATED AND TOURISM. TOURISM IS SUBSTANTIALLY HIGHER IN DRUMHELLER.



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



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



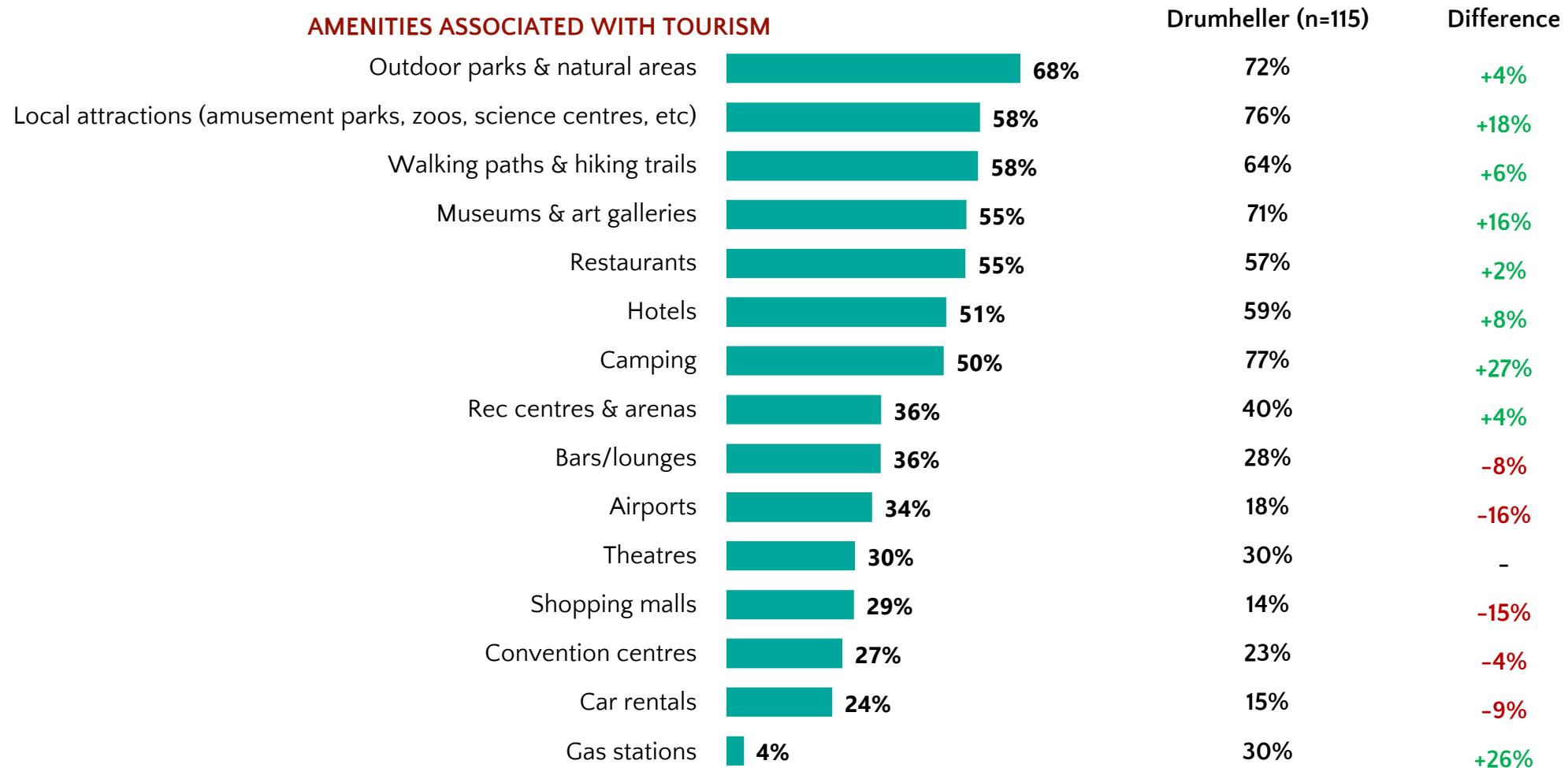

 Very positive impact Somewhat positive impact No impact
 Somewhat negative impact Very negative impact

4

WHAT PEOPLE KNOW



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



5

WELCOMING TOURISTS



IN TERMS OF LIKELIHOOD TO RECOMMEND, PROMOTERS HAVE DECREASED IN ALBERTA OVERALL – HOWEVER DRUMHELLER RANKS MORE HIGHLY

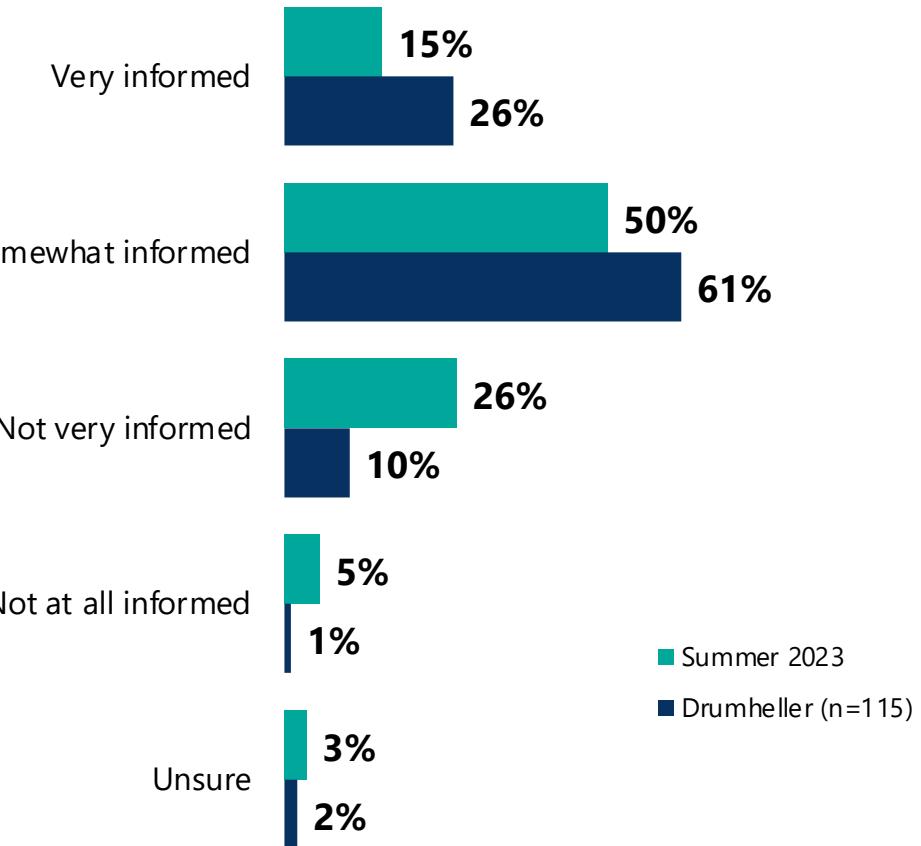
% LIKELIHOOD TO RECOMMEND

		TOTAL	Drumheller
	Promoters	27%	45%
	Passives	34%	23%
	Detractors	39%	32%
Likelihood to recommend (NPS)		-12	+13

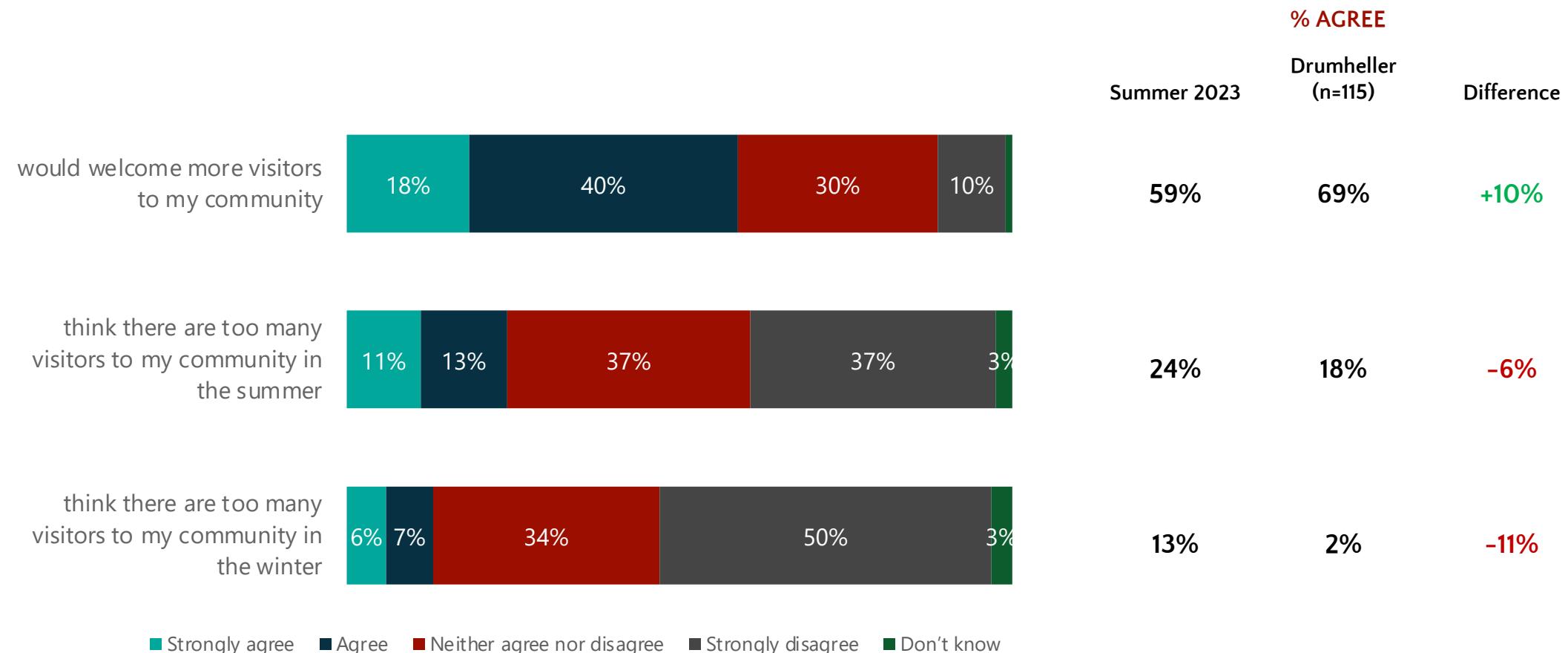


DRUMHELLER CONSIDERS THEMSELVES INFORMED ABOUT THE TOURISM INDUSTRY, ESPECIALLY RELATIVE TO THE REST OF THE PROVINCE

TOURISM SECTOR EXPERTISE



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



6

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		
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%