Drumheller and Region

Business Survey Results and Analysis

2025 Update

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Drumheller and Region Business Survey Results and Analysis – 2025 Update

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ACKNOWLEDGEMENTS

We would like to thank the 100 local businesses who contributed their feedback, ideas and expertise to this community-driven study. We thank each business for taking the time to provide considerate, expansive responses that allowed us to better understand their realities of operating a business within Drumheller and the surrounding Region.

The Drumheller and Region Business Survey and Analysis project
is the result of a collaborative partnership.

Thank you to all of the project partners
for their valuable contribution of their time and expertise:

Community Futures Big Country

Drumheller & District Chamber of Commerce

Travel Drumheller

Town of Drumheller Economic Development Department

MH Enterprises Employment Services

We respectfully acknowledge that we are on Treaty 7 territory, the ancestral and traditional territory of the Blackfoot Confederacy: Kainai, Piikani, and Siksika, as well as the Tsuut'ina First Nation and the Stoney Nakoda First Nation, and on the traditional territory of the Metis Nation of Alberta, Region 3. We recognize the land as an act of reconciliation and gratitude to those on whose territory we reside.

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EXECUTIVE SUMMARY OF 2025 UPDATE

This report is a follow-up to the 2022 Business Survey. That analysis involved significant outreach between January 26, 2022, and March 16, 2022. This 2025 survey iteration saw 100 responses from local businesses, with direct outreach again taking place via phone and email and through an online survey. Businesses engaged for the survey employ over 1,200 people, representing nearly one-in-four jobs in the area.

The project partners found the data from the 2022 survey to be invaluable to their organizations and the community and as such, determined that a follow-up survey would be beneficial. This survey followed the same format as the 2022 survey, asking similar questions and presenting similar economic analysis. Direct comparisons are used sparingly, as the list of businesses filling out the survey was distinct. It's therefore unclear whether responses are due to changing business sentiments or simply due to a different pool of respondents. Where relevant, comparisons have been flagged. To that end, this report again begins with a detailed statistical assessment of the area to analyze the local economy. The bulk of the information presented reflects data gathered through Lightcast Analyst. Data and includes:

- The number and size of businesses in the area by industry;
- Average wages, sales, and import/export data by industry;
- Employment by occupation, compared to provincial and national benchmarks;
- Employment by industry, again compared to provincial and national benchmarks; and
- Tourism-related data to highlight the importance of this industry to the local economy.

Following this data analysis, survey results are presented, analyzing business demographics, benefits and drawbacks to operating in the area, respondents' feelings towards tourism as an economic and community driver, and a review of the local labour pool. Key themes that emerged are:

- In general, responses were positive, whether discussing labour, the community, or business outlook.
- Respondents represented 1-in-4 jobs in the area, showcasing a very representative sample
- Nearly half of the businesses (48%) polled found their business has seen improvement over the last couple years, while only 14% have seen their business worsen
- Businesses are optimistic about the future, with 89.2% of businesses expecting to either sustain (47%) or expand and thrive (42.2%).
- 88.9% of respondents are either very happy (37.0%) or happy (51.9%) with their current workforce. That's not easy to achieve in a smaller community, where the labour pool is not huge.

- Tourism is seen as an overwhelming positive, with 92% of respondents feeling it's a positive for the region
- The "Active" season for businesses has increased greatly, with April, May and October now being a "busier month" for most businesses. January and February were the only months that were "Slower" for over half the respondents
- Benefits to doing business in the area most commonly revolve around the close-knit nature of the community and the supports businesses find among residents;
- Tourism is seen as a positive economic driver, though there are aspects that are also seen as a drawback (most notably, seasonality of demand);
- The Town is home to a significant number of small businesses, with an increasing need for supports accessing capital, a role that is supported admirably by Community Futures.
- The Community Partners are generally well-known in the community.

DATA SOURCES

Please note that every effort has been made to use the most current data available. There are three major sources of information for the remainder of this document:

- Canadian Business Registry (CBR) – June 2024
- Survey Response Data
- Lightcast 2024.Q3

Canadian Business Registry (CBR)

The major sources of information for the business registry are updated from the Statistics Canada survey program and Canada Revenue Agency's (CRA) Business Number account files. This CRA administrative data source allows for the creation of a complete set of all business entities.

Survey Data

Survey responses were gathered from 100 respondents between January 2025 and March 2025. Each of the project partners reached out to local organizations during this time to encourage engagement. Surveys were completed over the phone and through an online survey. In the event that respondents wished to remain anonymous, they had the option to do so.

A note on confidence intervals: typically, in a survey of this size, confidence intervals are given. However, we have avoided doing so here for a number of reasons.

- First, due to the self-selective nature of the survey methodology. Businesses were contacted directly by the community partners, meaning that respondents were not entirely random.
- Second, the total number of businesses within the target area is an inexact target, as some local businesses may be unknown to the community. Although the Business Counts data provides an estimate, it is best seen as a close approximation rather than an exact figure.
- Third, not all respondents chose to answer all questions. As such, there is a different sample size (N) for each question (sample sizes are denoted in Figure totals).

With these caveats in mind, while we stand behind all the information provided in the survey response data below, we feel it would be improper to provide a specific confidence interval.

Lightcast (Formerly EMSI) Analyst

Lightcast data brings the various snapshots of the Canadian economy together in a single picture. First, it aligns the geographies of the data from 2001 to the present, which means the Drumheller and Starland County region of 2001 is the same as the Drumheller and Starland County region of 2024. This results in geographically detailed data (down to the Census Subdivision level) that apply to today's economy.

The data is remarkably detailed, providing information on 305 industry classifications using the North American International Classification System (NAICS) system and 522 occupations from Statistics Canada's National Occupational Classification (NOCs) classification system in over 4,300 integrated geographical areas. The data is updated twice a year, so users have the most current information possible. And to top it all off, it adds future projections based on the CBR data so that it provides an idea of the future alongside the past and present.

Lightcast Data Sources include:
Canadian Business Registry (CBR)
2001, 2006, and 2011, 2016 Census data
Survey of Employment, Payroll and Hours (SEPH)
Labour Force Surveys (LFS)
Canadian Occupational Projection System (COPS)
CANSIM Demographics
Post-secondary Student Information System (PSIS) Education Data

1. THE CURRENT STATE OF BUSINESS IN DRUMHELLER AND STARLAND COUNTY

1.1. Business Count Data

This subsection illustrates the number and size of employers by industry. The data in this section comes from Statistics Canada's Canadian Business Patterns dataset. Employers in this dataset include businesses in the Business Register, which are all Canadian businesses that meet at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to Canada Revenue Agency; or
- Have a minimum of $30,000 in annual revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

Statistics Canada divides businesses into two major groupings:

1. Businesses with a determinate number of employees; and
2. Businesses with an indeterminate number of employees.

Within Drumheller and Starland County, the two most common industries are "agriculture, forestry, fishing and hunting" (503 businesses within the area) and "real estate and rental and leasing" (279 businesses).[1]

Table 1: Business Counts by Sector, Drumheller and Starland County, June 2024

Sector	Totals
Agriculture, forestry, fishing and hunting	503
Real estate and rental and leasing	279
Construction	93
Professional, scientific and technical services	81
Retail trade	80
Other services (except public administration)	74
Health care and social assistance	63
Accommodation and food services	54
Mining, quarrying, and oil and gas extraction	44
Transportation and warehousing	43
Finance and insurance	40
Administrative and support, waste management and remediation services	33
Wholesale trade	26
Arts, entertainment and recreation	16
Information and cultural industries	14
Manufacturing	13
Management of companies and enterprises	8
Educational services	8
Utilities	4
Public administration	3
Unclassified	169
Total	**1,648**

Source: Lightcast Analyst 2024.3

[1] Lightcast datasets suggest that business counts remained relatively stable through 2022, before seeing a sizable jump (nearly doubling in certain sectors, such as agriculture, forestry, fishing and hunting) from 2022 to 2023 and 2023 to 2024. Discussions with local staff suggested there was no "real" reason for this explosive growth, suggesting that there may instead be a reporting or administrative reason (i.e., the way businesses are classified, or extrapolation methodological changes) that Statistics Canada has seen such a sizable jump. Lightcast Analyst was unable to provide further clarification, so this oddity is just being noted here.

The vast majority of businesses with employees within Drumheller and Starland County employ between 1 and 9 employees. Specifically, across all sectors, small businesses (1-9 employees) represent 81% of local businesses with employees. Furthermore, in all but two sectors (utilities; public administration), businesses with 1-9 employees make up at least half of all businesses.

Medium-size businesses (10-99 employees) are most often present in “utilities,” “management of companies and enterprises,” and “accommodation and food services”. Finally, the only sectors that house businesses with 100+ employers in the area are “retail trade,” “health care and social assistance,” “manufacturing,” and “public administration”.

Table 2: Percentage of Business with Employees by Size, by Sector, June 2024

Sector	1-9 employees	10-99 employees	100+
Agriculture, forestry, fishing and hunting	97%	3%	0%
Real estate and rental and leasing	100%	0%	0%
Construction	95%	5%	0%
Professional, scientific and technical services	85%	15%	0%
Retail trade	61%	37%	2%
Other services (except public administration)	89%	11%	0%
Health care and social assistance	79%	18%	3%
Accommodation and food services	54%	46%	0%
Mining, quarrying, and oil and gas extraction	88%	13%	0%
Transportation and warehousing	76%	24%	0%
Finance and insurance	64%	36%	0%
Administrative and support, waste management and remediation services	93%	7%	0%
Wholesale trade	70%	30%	0%
Arts, entertainment and recreation	71%	29%	0%
Information and cultural industries	83%	17%	0%
Manufacturing	86%	0%	14%
Management of companies and enterprises	50%	50%	0%
Educational services	100%	0%	0%
Utilities	0%	100%	0%
Public administration	0%	33%	67%
Unclassified	89%	11%	0%
Total	**81%**	**18%**	**1%**

Source: Lightcast 2024.3

1.2. Industry Data

1.2.1. Supply Chain Analysis

When assessing a local economy, it is useful to determine which economic activities “bring money in”, and where money might be “leaking out”. Another way to assess this metric is to assess the in-region and imported purchases made by each subsector within the area. Table 3 presents the local industries in terms of total purchases made, as well as the percentage of those purchases that are made in-region and out-of-region.

Across all sectors, imports represent nearly 4-in-5 (79.3%) of total purchases. This figure is slightly higher than other similar sized communities and is typically a function of reality; in many industries within small communities, especially those relying on natural goods, reliance on imported purchases is a necessity.

Table 3: Supply Chain Purchases, by Sector

NAICS	% In-region Purchases	% Imported Purchases	Total Purchases
Manufacturing	7.4%	92.6%	$140,913,317
Professional, scientific and technical services	17.5%	82.5%	$35,248,197
Transportation and warehousing	20.2%	79.8%	$26,073,219
Administrative and support, waste management and remediation services	17.6%	82.4%	$23,837,628
Finance and insurance	12.7%	87.3%	$22,888,029
Agriculture, forestry, fishing and hunting	90.7%	9.3%	$20,680,841
Real estate and rental and leasing	27.7%	72.3%	$18,851,685
Wholesale trade	6.1%	93.9%	$16,928,551
Construction	23.7%	76.3%	$12,634,114
Information and cultural industries	4.0%	96.0%	$11,099,313
Mining, quarrying, and oil and gas extraction	43.3%	56.7%	$10,786,754
Health care and social assistance	26.5%	73.5%	$9,391,215
Utilities	49.8%	50.2%	$8,921,471
Retail trade	31.2%	68.8%	$7,793,808
Other services (except public administration)	50.1%	49.9%	$5,568,792
Accommodation and food services	59.2%	40.8%	$5,448,801
Public administration	36.8%	63.2%	$4,744,464
Arts, entertainment and recreation	34.5%	65.5%	$2,930,545
Management of companies and enterprises	0.0%	100.0%	$1,776,007
Total	**20.8%**	**79.2%**	**$387,683,557**

Source: Lightcast 2024.3

1.2.2. Economic Output

This subsection highlights industries with the largest economic impact. The following table illustrates industries with the highest level of economic output as measured by total sales. Average wages by industry are also illustrated. Four industries each account for over $75 million in total sales within Drumheller and Starland County; *public administration; agriculture, forestry, fishing and hunting; mining, quarrying, and oil and gas extraction;* and *accommodation and food services.*

Regarding wages, the two industries with the highest average wages are *utilities* ($93,364 average wages) and *mining, quarrying, and oil and gas extraction* ($85,284).

Table 4: Regional Sales and Wage Data, by Industry

NAICS	Sales	Average Wages
Public administration	$135,022,529	$83,737
Agriculture, forestry, fishing and hunting	$120,359,724	$43,308
Manufacturing	$105,240,290	$62,433
Accommodation and food services	$83,815,742	$20,273
Construction	$61,894,059	$68,792
Mining, quarrying, and oil and gas extraction	$56,801,968	$85,284
Health care and social assistance	$49,755,405	$45,511
Retail trade	$49,593,101	$32,155
Other services (except public administration)	$48,159,822	$55,033
Real estate and rental and leasing	$47,346,746	$82,341
Utilities	$38,293,050	$93,364
Finance and insurance	$35,663,375	$59,008
Transportation and warehousing	$34,368,576	$64,506
Professional, scientific and technical services	$23,620,960	$68,005
Wholesale trade	$18,899,920	$56,628
Arts, entertainment and recreation	$17,376,325	$31,822
Administrative and support, waste management and remediation services	$15,240,392	$40,385
Educational services	$13,270,105	$57,014
Information and cultural industries	$2,391,421	$51,388
Total	**$957,113,511**	**$49,446**

Source: Lightcast 2024.3

1.2.3. Export Sales

Exports identify the amount of money that is spent by businesses located outside the region (domestically and internationally) in exchange for goods or services produced by an industry located in Drumheller and Starland County. **In 2022, the most recent data available, total export sales in the area amounted to $732.7 million**. Table 5 below highlights the export data from each of the sectors in the local economy.

Similar to the overall sales data above, the *public administration* sector has risen significantly and leads the way, representing $130.6 million in export totals. These exports are reflective of federal administration (for example, federal protective services, defence contracts, etc.).

Table 5: Export Data, by Industry, 2022

NAICS	Exports from Region
Public administration	$130,594,657
Agriculture, forestry, fishing and hunting	$92,047,029
Manufacturing	$91,654,197
Accommodation and food services	$61,592,912
Mining, quarrying, and oil and gas extraction	$50,220,875
Health care and social assistance	$43,577,004
Other services (except public administration)	$35,254,217
Real estate and rental and leasing	$33,200,031
Retail trade	$28,263,657
Transportation and warehousing	$26,709,492
Finance and insurance	$25,417,145
Utilities	$25,275,206
Construction	$21,594,730
Wholesale trade	$15,905,937
Professional, scientific and technical services	$15,513,068
Arts, entertainment and recreation	12892063.62
Educational services	$11,400,548
Administrative and support, waste management and remediation services	$10,220,905
Information and cultural industries	$1,356,321
Total	**$732,689,995**

Source: Lightcast 2024.3

1.3. Labour Data – Industry of Employment

We are further able to assess the impact of local sectors by measuring job totals within each industry. Table 6 presents job count data from 2018 (pre-pandemic), 2024, and 2030 (estimates) for each local industry with at least 100 jobs in 2024.

Three sectors, *accommodation and food services, public administration* and *retail trade,* represent over 500 jobs locally, and are expected to grow (14.1 %, 1.0%, and 8.4%, respectively) between 2024 and 2030. Overall job totals are projected to grow by nearly 10% between 2024 and 2030.

Table 6: Top Industries of Employment, 2018, 2024, and 2030, Region

Sector	2018 Jobs	2024 Jobs	2030 Jobs	2024 - 2030 Change	2024 – 2030 % Change
Accommodation and food services	641	977	1,115	138	14.1%
Public administration	506	579	585	6	1.0%
Retail trade	478	556	603	47	8.4%
Health care and social assistance	489	456	528	72	15.8%
Other services (except public administration)	205	306	336	29	9.6%
Agriculture, forestry, fishing and hunting	328	265	241	-24	-9.1%
Construction	266	230	213	-17	-7.4%
Administrative and support, waste management and remediation services	127	188	238	50	26.8%
Manufacturing	104	177	222	44	25.0%
Finance and insurance	95	159	187	28	17.4%
Arts, entertainment and recreation	108	157	182	25	15.7%
Educational services	182	144	133	-11	-7.4%
Wholesale trade	118	127	138	11	8.4%
Professional, scientific and technical services	149	114	120	6	5.5%
Transportation and warehousing	112	110	118	8	7.5%
Total	**4,330**	**4,886**	**5,303**	**417**	**9%**

Source: Lightcast 2024.3

1.3.1. Location Quotient

Location Quotient is used to measure the relative concentration of an occupation; that is, it compares the percentage of jobs per occupation in the labour shed, relative to the total percentage of jobs in the same occupation in Alberta and Canada. A location quotient above 2 means the labour recruiting area employs twice as many jobs in that occupation than is typical in the nation. Such a high concentration shows that there is some momentum in growing or attracting these jobs that is unique to the region.

Table 7 presents location quotient at a provincial and national level (i.e., comparing the economies of Drumheller and Starland County to Alberta- and Canada-wide economies) for all industries that represented over 50 jobs in 2024.

Table 7: Location Quotient Data, by Industry

NAICS	2024 Jobs	Provincial LQ	National LQ
Accommodation and food services	977	2.9	3.0
Agriculture, forestry, fishing and hunting	265	2.7	3.4
Public administration	579	2.5	1.8
Utilities	64	1.8	2.1
Arts, entertainment and recreation	157	1.7	1.7
Other services (except public administration)	306	1.4	1.5
Unclassified	107	1.2	1.3
Retail trade	556	1.1	1.1
Finance and insurance	159	1.0	0.7
Administrative and support, waste management and remediation services	188	0.9	0.8
Total	4,886	1	1

Source: Lightcast 2024.3

Table 8 builds off the data presented in Table 7 by highlighting each industry's location quotient adjustment over time. It is important to note here that these gains or losses are all relative. That is, an increase or decrease in location quotient does not directly translate to an increase or decrease in the number of jobs per sector. Instead, it reflects that the industry has become **more, or less, concentrated when compared to provincial or national benchmarks**.

- *Accommodation and food services* saw the largest relative growth against both provincial and national benchmarks, concentration growths of 1.0 and 0.9, respectively.
- Compared to Alberta, two sectors went from being slightly less concentrated locally (a location quotient under 1.0) to slightly more heavily concentrated locally (a location quotient above 1.0) – *retail trade*, and *finance and insurance.*
- One significant note is that agriculture, forestry, fishing and hunting saw a significant downshift in concentration (again, this is not total jobs but jobs relative to the total benchmark economy total). This suggests that the local economy is becoming more diversified, supporting alternative sectors. Given the sector still has a LQ above 2.5 both provincially and nationally, it should not be taken as a diminishing of its importance locally, as it is still heavily concentrated.

Table 8: Location Quotient, by Industry, Historical Change

	Provincial			National		
NAICS	2018 LQ	2024 LQ	LQ Change	2018 LQ	2024 LQ	LQ Change
Accommodation and food services	1.8	2.9	1.0	2.1	3.0	0.9
Agriculture, forestry, fishing and hunting	6.5	2.7	-3.7	3.9	3.4	-0.5
Public administration	2.0	2.5	0.4	1.9	1.8	-0.1
Utilities	1.3	1.8	0.5	1.5	2.1	0.5
Arts, entertainment and recreation	1.3	1.7	0.4	1.2	1.7	0.4
Other services (except public administration)	1.1	1.4	0.3	1.1	1.5	0.5
Unclassified	0.9	1.2	0.3	0.9	1.3	0.4
Retail trade	0.9	1.1	0.1	1.0	1.1	0.1
Finance and insurance	0.7	1.0	0.3	0.5	0.7	0.2
Administrative and support, waste management and remediation services	0.6	0.9	0.2	0.6	0.8	0.2

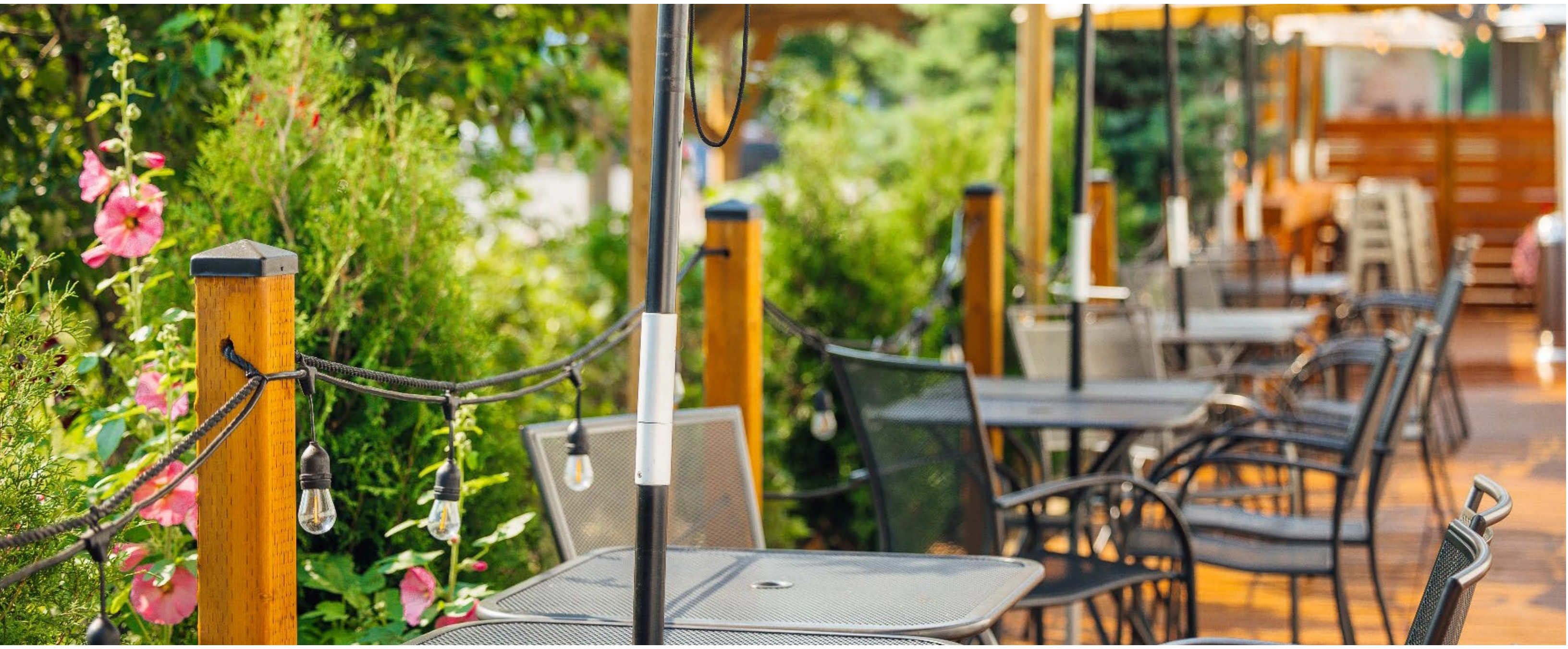
Source: Lightcast 2024.3

1.3.2. Shift-share Analysis

Shift-share analysis compares the local employment growth/decline of regional jobs by industry to the employment growth/decline of that industry within Canada, as well as the job growth overall for Canada. More specifically, this analytical tool examines the job growth/decline by attributing growth, stability, or decline in particular industries over time due to three distinct forces:

- National economic growth: regional job growth/decline that is attributable to the growth, stability, or decline of the entire Canadian economy. Industries will be impacted positively or negatively by the state of the Canadian economy and consumer spending at a national level, external to any local factors.
- Industry growth: regional job growth/decline that is attributable to the growth, stability, or decline of that particular economic activity in the Canadian economy (with the economic growth component removed). General industry trends are outside the influence of local actors and are therefore removed from the local impact.
- Local economic growth: local job growth/decline that is attributable to the local economy because it is growing/declining more or less quickly than jobs in the larger economy (with the Canadian economic and industry growth components removed).

This tool, when correctly interpreted, provides greater descriptive power than the location quotient method. It has been applied to NAICS Industries using place of work statistics. Shift-share analysis allows the examination of changes through time (trends) versus the static snapshot of location quotients.



Local Shift-Share Analysis

Table 9 looks to the current (2024) and future (2030) projects to assess which sectors are most positively impacted by local factors. The table presents the expected change due to national and industry effects (expected change), contrasts that total with the projected impact (actual change) and therein assesses the regional/local effects (competitive effect).

Table 9: Shift-share Analysis, by Industry, 2014-2021

NAICS	2024 Jobs	2030 Jobs	Expected Change	Actual Change	Competitive Effect
Accommodation and food services	977	1,115	59	138	79
Retail trade	556	603	8	47	39
Manufacturing	177	222	7	44	37
Administrative and support, waste management and remediation services	188	238	21	50	29
Health care and social assistance	456	528	46	72	26
Finance and insurance	159	187	12	28	15
Arts, entertainment and recreation	157	182	10	25	15
Other services (except public administration)	306	336	17	29	12
Wholesale trade	127	138	0	11	11
Real estate and rental and leasing	85	96	4	11	7
Utilities	64	69	1	5	4
Transportation and warehousing	110	118	9	8	0
Professional, scientific and technical services	114	120	7	6	-1
Information and cultural industries	6	4	0	-2	-2
Agriculture, forestry, fishing and hunting	265	241	-14	-24	-10
Educational services	144	133	6	-11	-17
Public administration	579	585	30	6	-24
Mining, quarrying, and oil and gas extraction	79	57	2	-22	-24
Construction	230	213	10	-17	-27
Total	**4,886**	**5,303**	**242**	**417**	**175**

Source: Lightcast 2024.3

1.4. Occupation Data

Persons in the labour force can be classified using the National Occupational Classification (NOCs) codes; a four-tiered hierarchical arrangement of occupational groups with successive levels of disaggregation. It contains broad occupational categories (1-digit), major (2-digit code), minor (3-digit code) and unit groups (4-digit code).

Table 10 shows that two 4-digit unit groups in Drumheller and Starland County represent over 200 jobs each:

- Food support occupations (with median annual wages of $33,980)
- Cashiers and other sales support occupations ($30,462)

Table 10: Top 10 Occupations, by 2021 Jobs, 2018-2030, 4 Digit NOC

Occupation	2018 Jobs	2024 Jobs	2030 Jobs	Median Wages	2024 - 2030 % Change
Food support occupations	244	313	354	$33,980	12.9%
Cashiers and other sales support occupations	147	202	229	$30,462	13.0%
Retail salespersons and non-technical wholesale trade sales and account representatives	118	163	178	$48,759	9.4%
Managers in agriculture, horticulture and aquaculture	251	149	118	N/A	-20.3%
Assisting occupations in support of health services	122	146	169	$49,324	15.7%
Cooks, butchers and bakers	105	145	170	$36,716	17.1%
Cleaners	116	137	150	$37,059	9.6%
Transport truck and transit drivers	92	120	138	$59,568	15.1%
Office support and court services occupations	88	102	110	$45,814	7.1%
Assisting occupations in legal and public protection	45	99	122	$76,115	22.9%
Total (all)	**4,330**	**4,886**	**5,303**	**$57,782**	**8.5%**

Source: Lightcast 2024.3

1.4.1. Location Quotient

As was completed for industries, a location quotient assessment can be done for occupation classifications. Once again, a location quotient above 1 means the labour recruiting area employs more jobs in that occupation than is typical in the province or nation. A high concentration (above 1.25) suggests that there may be some momentum in growing or attracting these jobs that is unique to the region.

Table 11 presents location quotient at a provincial and national level (i.e., comparing the economies of Drumheller and Starland County to Alberta- and Canada-wide economies) for all 1-digit occupation classes in 2024.

Although *sales and service occupations* represent the largest number of jobs in 2024 (1,719) and are heavily concentrated, *natural resources, agriculture and related production occupations* are the most heavily concentrated sector relative to the provincial and national economies.

Table 11: Location Quotient, 1 Digit NOC, 2024

Occupation	2024 Jobs	Provincial LQ	National LQ
Sales and service occupations	1,719	1.5	1.4
Trades, transport and equipment operators and related occupations	805	0.9	1.0
Business, finance and administration occupations	614	0.8	0.7
Occupations in education, law and social, community and government services	502	1.0	0.9
Natural resources, agriculture and related production occupations	339	1.5	2.8
Health occupations	327	0.9	0.9
Natural and applied sciences and related occupations	197	0.5	0.4
Occupations in manufacturing and utilities	155	0.9	0.6
Occupations in art, culture, recreation and sport	113	1.0	0.8
Unclassified occupation	107	1.2	1.3
Legislative and senior management occupations	9	0.7	0.6
Total	**4,886**	**1**	**1**

Source: Lightcast 2024.3

1.4.2. Shift-Share Analysis

Once again, we are able to apply the same analysis to occupations that was done for industry employment totals. That is, we can use shift-share analyses to estimate the local "competitive effect" for major occupations in Drumheller and Starland County.

Table 12 again looks to the current (2024) and future (2030) projection data to assess which sectors are most positively impacted by local factors. The table presents the expected change due to national and industry effects (expected change), contrasts that total with the projected figures (actual change) and therein assesses the regional/local effects (competitive effect).

Table 12: Shift-share Analysis, by 1-Digit Occupation, 2024-2030

Occupation	2024 Jobs	2030 Jobs	Expected Change	Actual Change	Competitive Effect
Business, finance and administration occupations	614	638	33	24	-9
Natural and applied sciences and related occupations	197	215	14	18	4
Health occupations	327	377	40	50	11
Occupations in education, law and social, community and government services	502	526	27	24	-4
Occupations in art, culture, recreation and sport	113	133	5	20	15
Sales and service occupations	1,719	1,918	70	199	129
Trades, transport and equipment operators and related occupations	805	869	39	64	24
Natural resources, agriculture and related production occupations	339	319	4	-20	-24
Occupations in manufacturing and utilities	155	182	6	27	21
Unclassified occupation	107	119	7	12	5
Legislative and senior management occupations	9	8	0	-1	-1
Total	**4,886**	**5,303**	**246**	**417**	**171**

Source: Lightcast 2024.3

1.5. Commuter Flow

To better understand who works in Drumheller and Starland County, we can turn to commuter flow data from the 2021 Census. This data allows us to understand where those who are employed within Drumheller and Starland County typically live (Table 13). As the table illustrates, the communities are fairly inclusive – of the 3,225 individuals who travel to work, 2,590 also live within the area.

There are two important pieces to keep in mind when assessing the data:

1. This data is representative of a snapshot in time of when the Census was taken (spring/early summer 2021). As such, commuting data was impacted by the pandemic, leading to a decrease in residents with a "usual place of work". These numbers are valuable as relative measures. However, they likely undercount the total number of commuters to each community (including locally).
2. These numbers are representative of only those people with a usual place of work. Therein, there will be fewer total individuals reflected here because self-employed folks with no physical location, those working from home, or those with hybrid/varied workplaces will not be counted.

Table 13: Place of Residence for those Typically Employed Within Drumheller/Starland County

Place of Residence	Commuters
Drumheller	2,395
Starland County	195
Kneehill County	110
Calgary	95
Wheatland County	85
Munson	60
Airdrie	55
Carbon	40
Strathmore	30
Three Hills	30
Morrin	25
Stettler County No. 6	25
Total	**3,225**

Source: Statistics Canada 2021 Census.

We are similarly able to understand where residents of Drumheller and Starland County travel to for work (Table 14). As can be seen, only 285 residents travelled outside either Drumheller or Starland County to their place of employment in 2021.

Table 14: Usual Place of Work for Residents of Drumheller/Starland

Place of Work	Commuters
Drumheller	2,535
Hanna	60
Starland County	55
Delia	50
Morrin	45
Wood Buffalo	25
Three Hills	20
Drayton Valley	15
Total	**2,875**

Source: Statistics Canada 2021 Census.

1.6. Tourism

The challenge for assessing the impacts of "tourism" is that there is no set definition of "tourism industries". Instead, various subsectors across a range of industries are all impacted by tourism. For example, the subsector *performing arts companies,* is heavily impacted by tourism but is instead nested within the broader *arts, entertainment and recreation* industry.

This report will rely on Industry Canada's profile of tourism industries to create a custom list of subsectors that can be classified as tourism related in Drumheller and Starland County[2] (Table 15). While there are spillover impacts to other industries, these sectors represent those where a significant portion of the sector is impacted by tourism activities.

Table 15: Tourism Sectors

Tourism Sectors
Scheduled air transportation
Non-scheduled air transportation
Rail Transportation
Deep sea, coastal and Great Lakes water transportation
Inland water transportation
Urban transit systems
Taxi and limousine service
Charter bus industry
Scenic and sightseeing transportation, land
Scenic and sightseeing transportation, water
Travel arrangement and reservation services
Performing arts companies
Spectator sports
Promoters (presenters) of performing arts, sports and similar events
Independent artists, writers and performers
Heritage institutions
Amusement parks and arcades
Gambling industries
Other amusement and recreation industries
Traveller accommodation
Recreational vehicle (RV) parks and recreational camps
Special food services
Drinking places (alcoholic beverages)
Full-service restaurants and limited-service eating places

Source: Industry Canada SME Profile: Tourism Industries in Canada

[2] Industry Canada, SME Profile: Tourism Industries in Canada. March, 2015

1.6.1. Tourism Industry and Occupation Data

Job counts for those tourism sectors with at least one job are presented in Table 16. Tourism related jobs and sectors have seen considerable increases since 2018, with an increase of almost 400 jobs from 2018 to 2024. Although this rapid rate of increase is projected to slow, considerable growth is still expected, with a projected increase of 162 additional jobs in tourism-related sectors from 2024 to 2030, an increase of 14%.

These data further suggest that, in 2024, 23.3%, or almost 1 out of every 4 jobs in Drumheller and Starland County are *directly or indirectly related* to the tourism sector. The most prominent sectors of employment are *full-service restaurants and limited-service eating places*, and *traveller accommodation*.

Table 16: Tourism Jobs, Drumheller and Starland County

Industry	2018 Jobs	2024 Jobs	2030 Jobs	2024 to 2030 Change	2024 - 2030 % Change
Full-service restaurants and limited-service eating places	409	504	564	60	12%
Traveller accommodation	151	227	266	39	17%
Drinking places (alcoholic beverages)	13	122	162	40	32%
Other amusement and recreation industries	52	108	132	24	23%
Special food services	26	62	54	-8	-13%
Recreational vehicle (RV) parks and recreational camps	42	61	69	8	12%
Heritage institutions	52	50	47	-2	-4%
Travel arrangement and reservation services	10	4	5	1	25%
Performing arts companies	1	0	0	---	---
Spectator sports	2	0	0	---	---
Independent artists, writers and performers	2	0	1	---	---
Total (all)	**759**	**1,138**	**1,300**	**162**	**14%**

Source: Lightcast 2024.3

As with the broader industry assessments above, we are able to calculate the location quotient for tourism industries within the region. As expected, the majority of sectors within the tourism field have a location that is significantly higher than 1.0 – that is, tourism jobs are consistently more heavily concentrated within the Drumheller and Starland County economies, compared to the economies of Alberta or Canada.

The most concentrated industries relative to provincial and national benchmarks are *recreational vehicle parks and recreational camps, drinking places (alcoholic beverages),* and *heritage institutions*, with each of these three sectors seeing at least 7 times more concentration compared to each benchmark economy.

Table 17: Location Quotient for Tourism Industries

Industry	2024 Jobs	Provincial LQ	National LQ
Full-service restaurants and limited-service eating places	504	2.0	2.0
Traveler accommodation	227	4.3	5.5
Drinking places (alcoholic beverages)	122	17.8	16.1
Other amusement and recreation industries	108	2.4	2.5
Special food services	62	4.4	3.4
Recreational vehicle (RV) parks and recreational camps	61	18.2	13.1
Heritage institutions	50	7.1	7.2
Travel arrangement and reservation services	4	0.7	0.4
Total (all)	**1,138**	---	---

Source: Lightcast 2024.3

Using staffing patterns, we are able to assess the occupations most frequently employed by tourism businesses. Notably, the majority of occupations are *food and accommodation services* related, led by *food support occupations, cooks, butchers and bakers,* and *occupations in food and beverage service.*

Table 18: Tourism Occupations, Drumheller and Starland County

Occupation	2018 Jobs	2024 Jobs	2030 Jobs	2024 to 2030 Change	2024 - 2030 % Change
Food support occupations	225	298	337	39	13%
Cooks, butchers and bakers	93	131	155	24	18%
Occupations in food and beverage service	30	83	103	20	24%
Cleaners	45	74	85	11	15%
Managers in food service and accommodation	72	67	57	-10	-15%
Service supervisors	36	49	55	5	10%
Program leaders and instructors in recreation, sport and fitness	19	34	41	7	20%
Cashiers and other sales support occupations	29	34	38	4	12%
Support occupations in accommodation, travel, tourism and amusement services	12	31	33	2	7%
Occupations in travel and accommodation	17	28	36	8	29%
Logging, forestry, landscaping and other related labourers	12	27	34	7	27%
Specialized occupations in services	19	24	30	5	22%

Source: Lightcast 2024.3

Another measure of tourism's impact in the community is through the number of businesses in tourism sectors. As noted in Table 19, in June 2024 there were 71 businesses in the tourism sector, most predominantly within the *full-service restaurants and limited-service eating places* sector (28 businesses). Once again, please note that 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.

Of these 71 businesses, 24 of them have unknown employment totals, while the majority of the rest are small businesses, with 1-9 employees.

Table 19: Business Counts by Tourism Subsector

Tourism Sector	1-9 Employees	10-99 Employees	Unknown	Total
Full-service restaurants and limited-service eating places	13	11	4	28
Traveler accommodation	3	5	7	15
Other amusement and recreation industries	2	0	5	7
Recreational vehicle (RV) parks and recreational camps	2	1	2	5
Heritage institutions	2	1	1	4
Taxi and limousine service	2	0	1	3
Special food services	2	0	1	3
Independent artists, writers and performers	0	0	2	2
Spectator sports	1	0	0	1
Promoters (presenters) of performing arts, sports and similar events	0	0	1	1
Amusement parks and arcades	0	1	0	1
Drinking places (alcoholic beverages)	1	0	0	1
Total	**28**	**19**	**24**	**71**

Source: Canadian Business Counts, December 2020

1.6.2. Tourism Industry Outputs

Similar to job data, we can isolate total sales figures and average wages for tourism sectors.

These data suggest that tourism businesses are directly responsible for 11% of sales in Drumheller and Starland County, and that average wages in the tourism sector are $21,253. Average annual wages are not adjusted to part- and full-time work, so the low total speaks to the seasonal nature of tourism employment.

Please note, this data is derived from different data sources than job or business counts. Where sectors have employees, or businesses, but no notable sales, this is typically due to different reporting periods, standards, and/or business oddities (i.e., a business operating at a loss).

Table 20: Regional Sales and Wage Data, by Tourism Industry

NAICS	Sales	Average Wages
Full-service restaurants and limited-service eating places	$35,017,770	$20,346
Traveler accommodation	$34,653,546	$22,295
Heritage institutions	$10,460,391	$54,333
Recreational vehicle (RV) parks and recreational camps	$9,746,137	$26,468
Other amusement and recreation industries	$6,915,934	$20,156
Drinking places (alcoholic beverages)	$3,713,620	$11,945
Special food services	$684,668	$13,533
Total	**$101,192,067**	**$21,253**

Source: Lightcast 2024.3

1.6.3. Indirect Tourism Outputs

In order to estimate the impact of tourism on sectors not captured by the above data, we can rely on direct and indirect multipliers. Multipliers are economic tools that measure where money is spent. When money is spent at a local business, the business typically reinvests a portion of that money into other local sectors, generating additional local revenue. As such, $1 spent by a tourist has a local impact greater than $1.

As a specific example, data suggests that for every $1 in sales in the *full-service restaurants and limited-service eating places* sector, $1.20 in economic activity is generated locally.

We are able to measure the local multiplier effect of tourism through three different pieces of data; jobs, sales, and wages. As Table 21 illustrates, though tourism is responsible for 1,138 jobs in the tourism sector directly, it is also responsible for another 132 jobs across all other sectors in Drumheller and Starland County.

Table 21: Total Impact on Local Economy by Tourism Sector

	Sales	Wages	Jobs
Direct Impact	$101,192,067	$24,100,655	1,138
Multiplier Effect	$15,209,932	$1,822,039	132
Total	**$116,401,999**	**$25,922,694**	**1,270**

Source: Lightcast 2024.3

In an attempt to measure the impact of tourism on specific industries within Drumheller and Starland County, we can weigh the multiplier effect by the sales, wages, and jobs by the proportion of the industry that each sector represents. For example, 11% of sales in the region are housed within manufacturing. Therefore, we would expect that 11% of the multiplier effect would be accounted for within this sector ($1.28 million dollars). Table 22 suggests an estimated impact by sector within the region, sorted by total sales impact.

Table 22: Total Impact on Local Industries, by Tourism Sector

Sector	Jobs due to Tourism	Sales due to Tourism
Public administration	7	$1,638,556
Agriculture, forestry, fishing and hunting	3	$1,460,617
Manufacturing	2	$1,277,136
Accommodation and food services	12	$1,017,140
Construction	3	$751,111
Mining, quarrying, and oil and gas extraction	1	$689,316
Health care and social assistance	5	$603,803
Retail trade	7	$601,834
Other services (except public administration)	4	$584,440
Real estate and rental and leasing	1	$574,573
Utilities	1	$464,703
Finance and insurance	2	$432,790
Transportation and warehousing	1	$417,077
Professional, scientific and technical services	1	$286,650
Wholesale trade	2	$229,359
Arts, entertainment and recreation	2	$210,869
Administrative and support, waste management and remediation services	2	$184,949
Educational services	2	$161,038
Information and cultural industries	0	$29,021

Source: Lightcast 2024.3

2. SURVEY RESPONSE DATA & SUMMARY

The Drumheller and Region Business Survey response survey received a total of 100 responses. Of those respondents, 41 wished to remain confidential. Within this report, all survey responses are either aggregated or remain confidential. However, for those businesses who were willing to share their contact information, complete response-data has been provided to project partners. Not all questions required an answer, leading to different sample sizes per question. To ensure transparency, the number of respondents for each question has been included in the Figure title as "(N = x)".

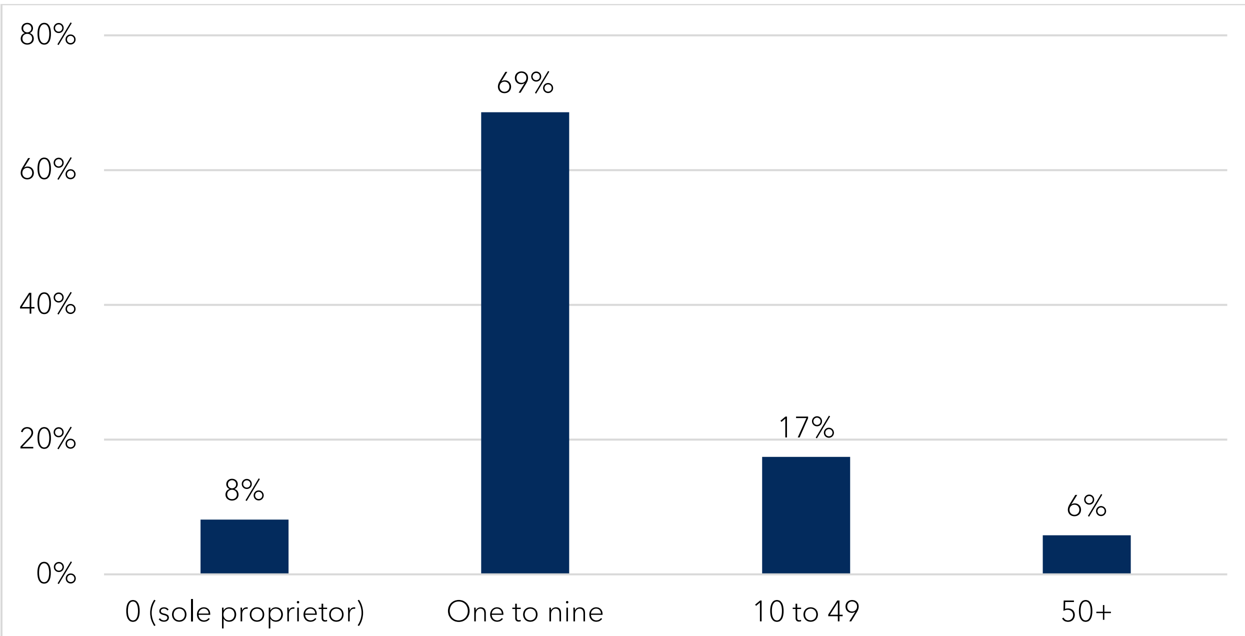
2.1. Business Demographic Data

The most common sectors for respondents were "other services" and "accommodation and food services" each representing 23 businesses. This responses data suggests agriculture businesses were the hardest to reach relative to business count data (Table 1) and "other services" were most heavily weighted relative to their total business counts in the community. The "other services" industry is an amalgamation of a variety of service businesses that do not fit in other sectors. Complete definitions can be found on Statistics Canada's Website.

Figure 1: Business Industry for Respondents (N = 86)

Regarding business size, just over two-in-three respondents were small businesses, with one to nine employees. This breakdown matches the distribution of businesses in the community when considering only those with employees. It does suggest that sole proprietorships were underrepresented but this is to be expected for two reasons. First, these businesses are typically much more difficult to reach for interviews and second, many businesses classified as sole proprietorships are unofficial, part-time "side opportunities." Given the prevalence of small businesses in the community and the importance of this subsection of businesses, nearly 70% of respondents represent this category is a net positive.

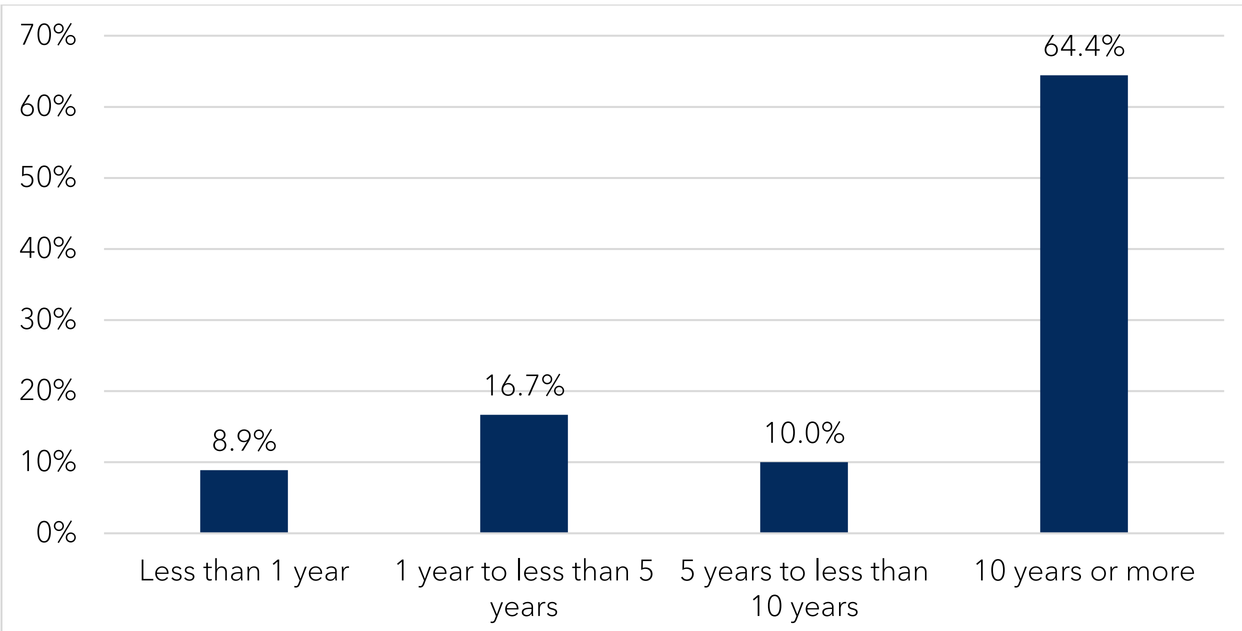
Figure 2: Number of FTE employees within each business (N = 86)



In total, respondents employ over 1,200 full-time equivalent employees, representing nearly a quarter of all jobs in the area.

Regarding the length of time in operation, many local businesses have clearly established deep roots in the community, with 64.4% of businesses operating for over 10 years. Positively, each of the other three responses (less than 1 year, 1-5 years, and 5-10 years) each saw at least 8% response rates, suggesting the responses will present a wealth of perspectives. Respondents were also able to select "don't know" though no businesses chose this option.

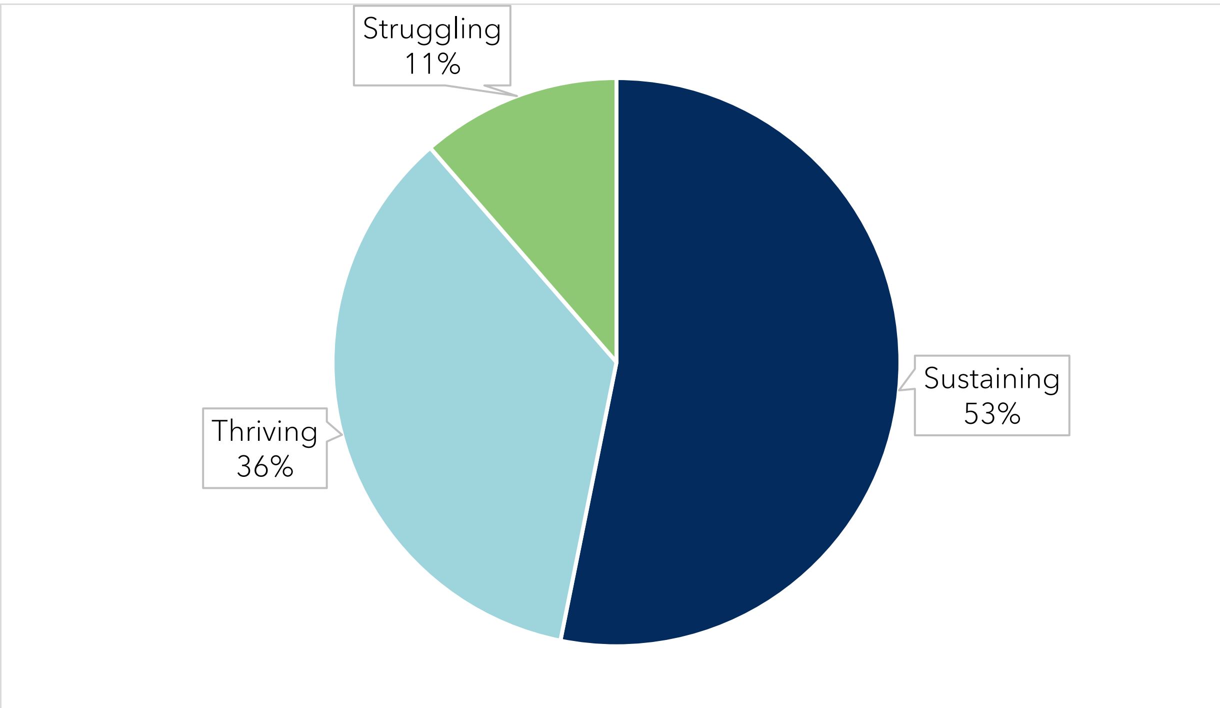
Figure 3: How Long has Your Business Been in Operation? (N = 90)



2.2. Business Status

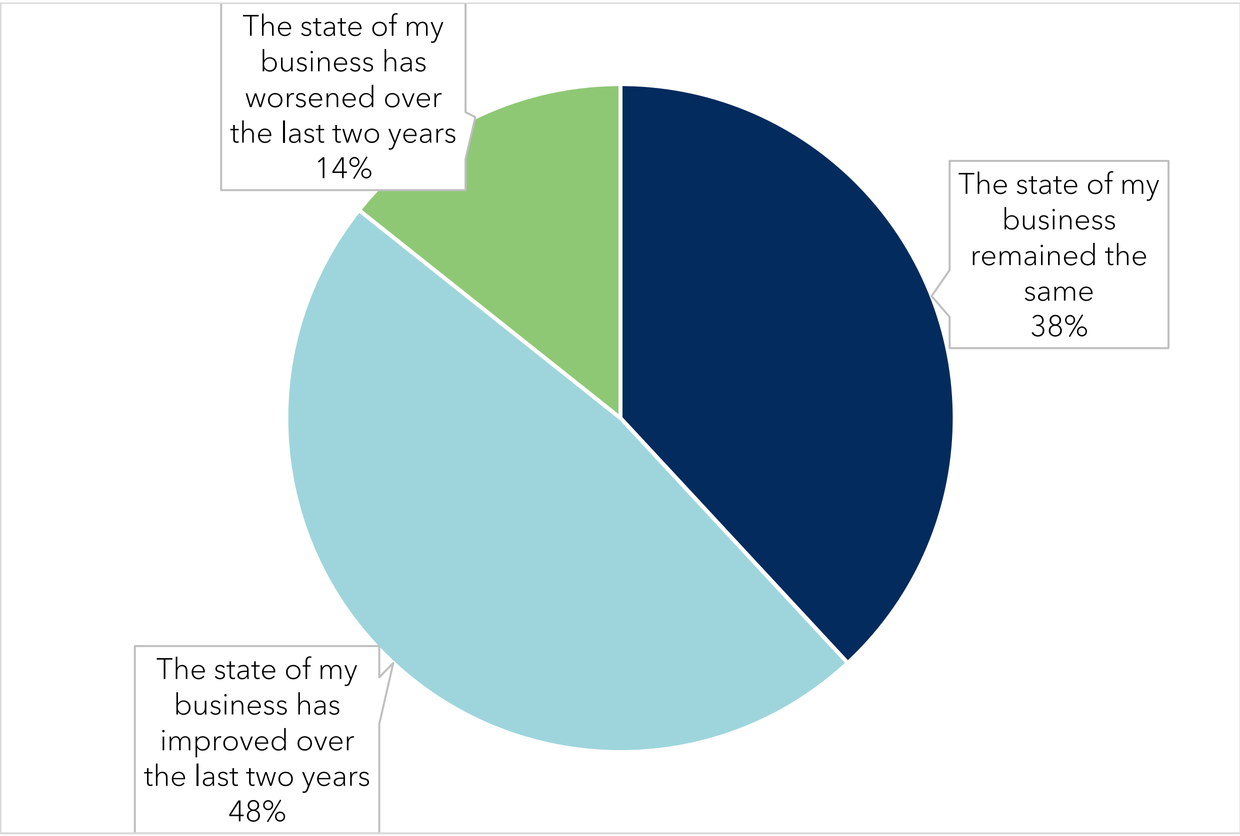
Over the previous two years, respondents are doing relatively well, with over one-in-three respondents noting that they are "thriving" (36%) while a further 53% were "sustaining" operations. One-in-ten (11%) of businesses responded that they were struggling over the previous two years.

Figure 4: How would you rate the state of your business over the previous two years? (N = 86)



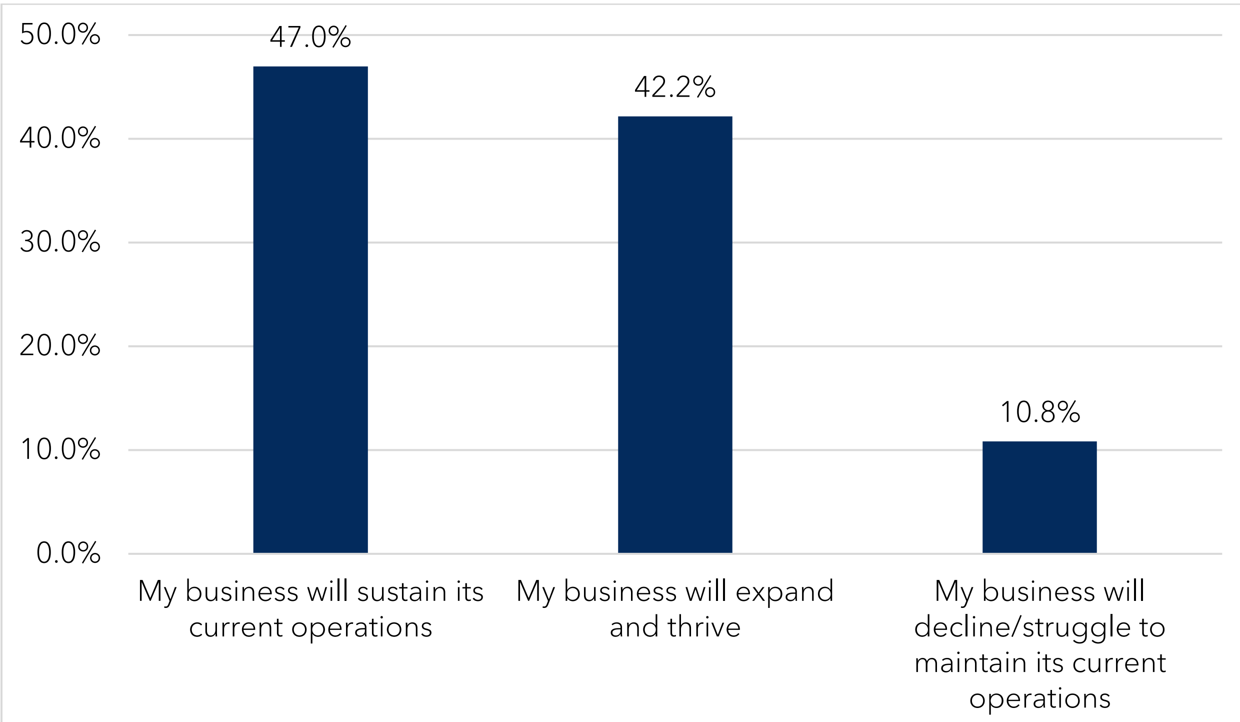
When asked whether this was a continuation of prior business operations, an improvement from their experience during the height of the pandemic, or a worsening of operations, the responses were again mostly positive. That is, 47.6% of businesses have seen their experience improve over the previous two years, 38.1% have remained steady, and only 14.3% of businesses have seen worsening operations.

Figure 5: Does your previous answer denote a change from your experience during the pandemic? (N = 84)



Regarding their organization's future outlook, respondents are optimistic. Specifically, only 10.8% of businesses expect to decline or struggle to maintain their current operations after the pandemic. This figure is less than the 14% of businesses that noted there business operations have worsened over the past two years, suggesting at least some businesses who have seen a downturn are expecting to rebound over the coming years.

Figure 6: What Best Represents Your Feelings About Your Business Expectations? (N = 83)

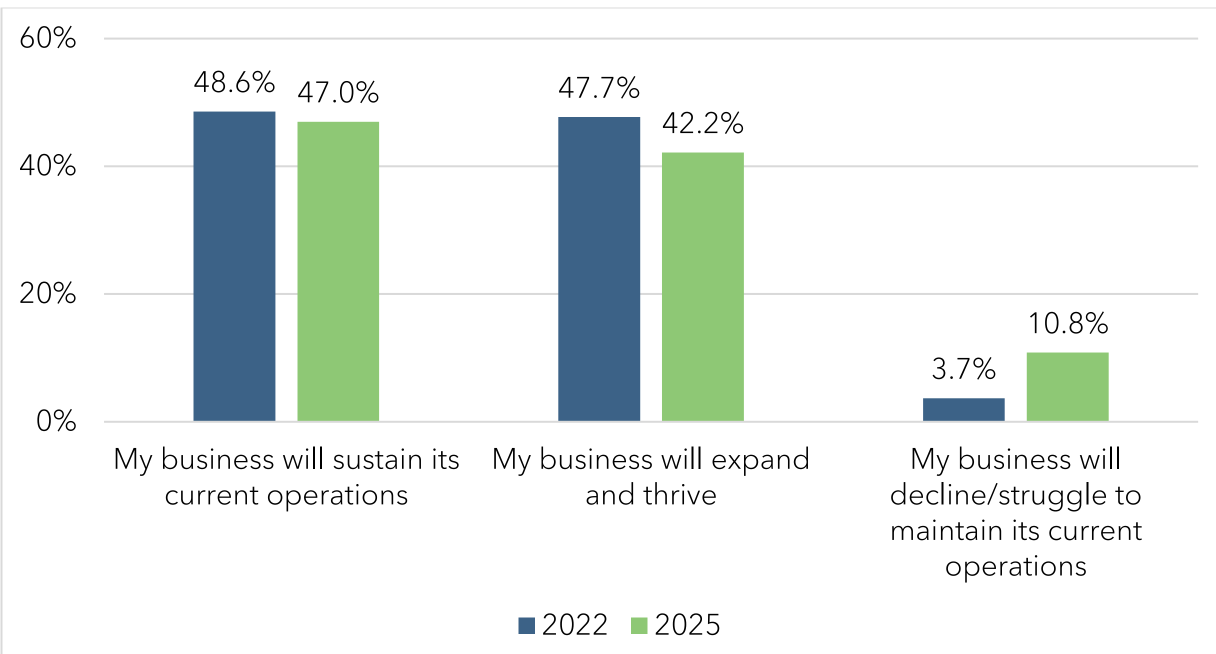


2.3. Comparing the Findings Between Surveys

As the survey from 2022 and 2025 have different business respondents, and different sample sizes, we are hesitant to make too many comparisons. The reality is, though the questions are similar, with different businesses responding direct comparisons are not necessarily indicative of shifting sentiments among businesses. At the same time, at a high level some basic comparisons can be worthwhile. We present two below.

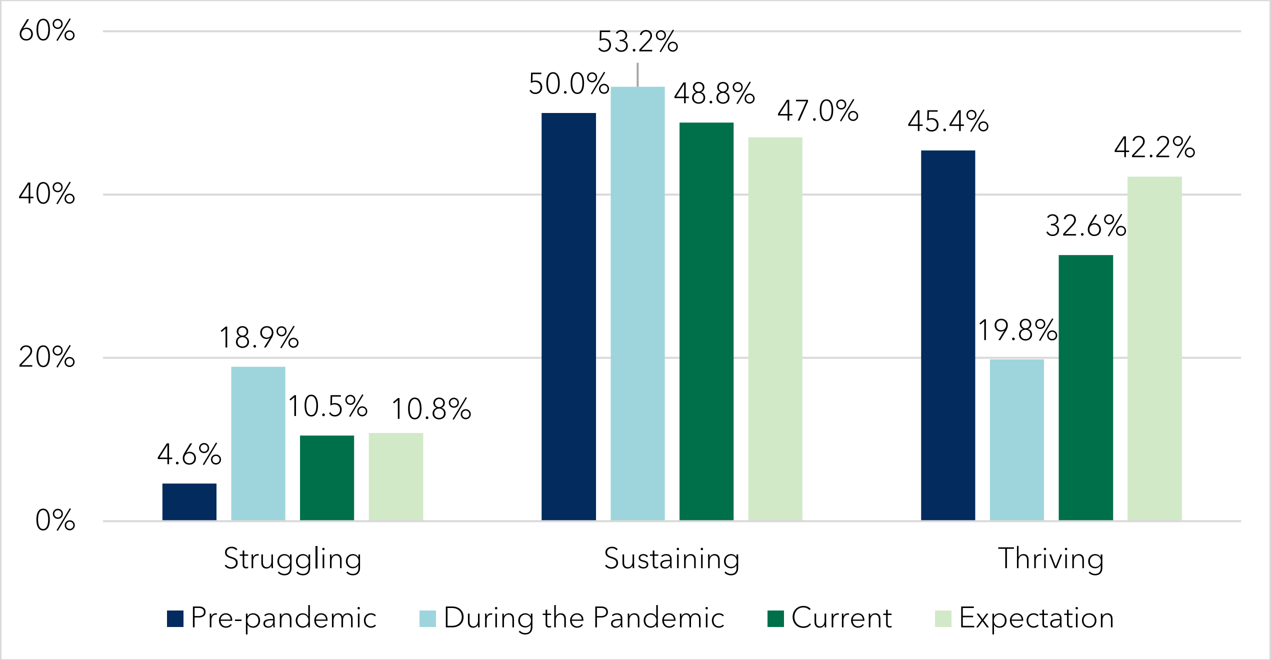
First, we note that a slightly larger percentage of businesses are concerned about their business' future outlook in 2025 compared to 2022. It is possible that the positive outlook in 2022 was largely due to the fact that many business' were struggling at the time due to the pandemic, but had an expectation of a return to normalcy over the next two years. It should also still be noted that nearly 90% of businesses in 2025 still expect to either sustain or expand operations in the future.

Figure 7: What Best Represents Your Feelings About Your Business Expectations? (N = 109 in 2022 and 83 in 2025)



Second, and very positively, the overall trend appears quite strong. That is, after seeing 18.9% of businesses "struggling" during the pandemic (according to the previous survey results), that number is down to 10.5% of businesses currently, with a similar number expecting to continue struggling. Alternatively, while only 19.5% of businesses were thriving during the pandemic, 32.6% are currently thriving and 42.2% are expecting to thrive in the future. This overall trend suggests that while businesses haven't quite reached pre-pandemic levels of outlook (where only 4.6% of businesses were struggling and 45.4% of businesses were thriving), the overall trend suggests respondents are recapturing much of their losses.

Figure 8: State of the Business from pre-pandemic to future expectation (Ns between 113 and 83)



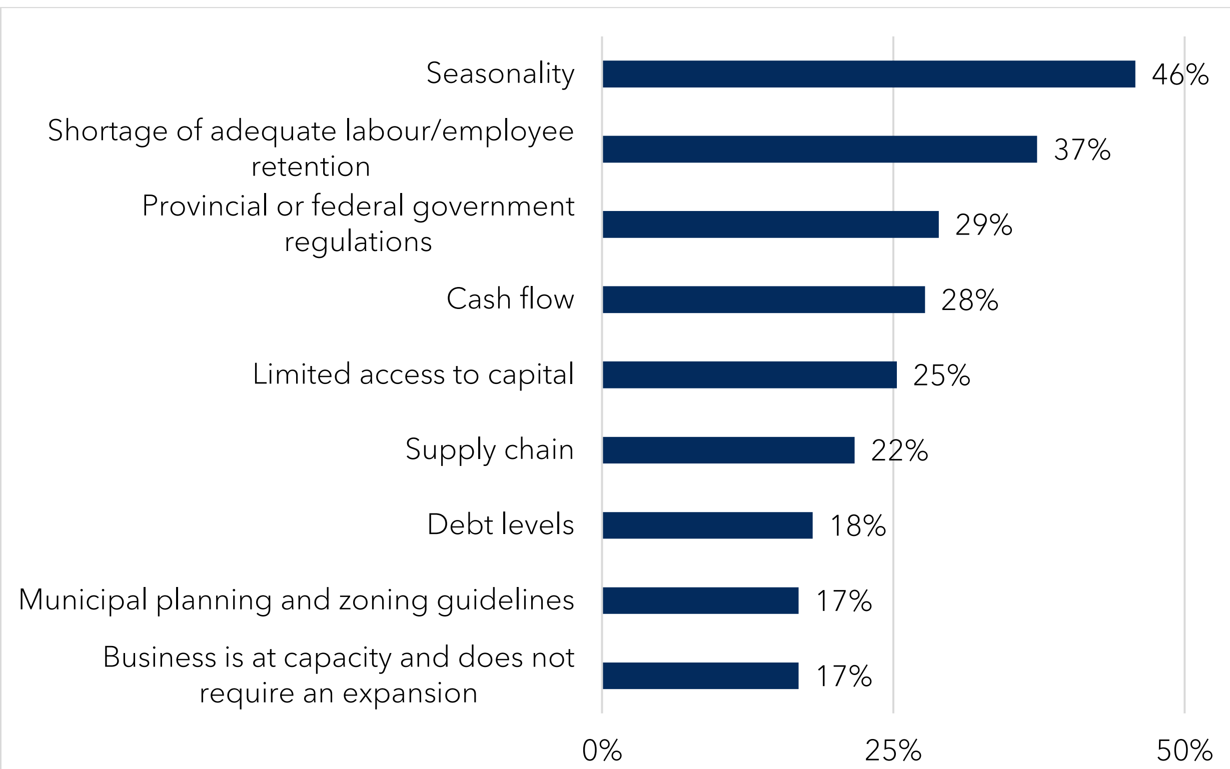
2.4. Business Supports

Turning to reasons regarding why businesses may be limited in their growth potential, seasonality (46%) and a shortage of adequate labour/employee retention (37%) were the two most common reasons.[3] Nearly one-in-five (17%) of businesses felt they were at capacity and do not require an expansion, suggesting that 83% of businesses feel they are able to expand in some capacity if supply-side challenges are eased. Only 17% of respondents felt "municipal planning and zoning guidelines" were a hindrance to their business. As this is a common frustration for entrepreneurs, seeing fewer than one-in-five respondents note municipal regulations as a limiting factor should be seen as a strong success locally.

For respondents who answered "other" (32.5% of respondents), the two most common limitations for their business included:

- Rising and high costs (rent, utilities, goods, transportation); and
- Governmental bureaucracy challenges (across all levels of government).

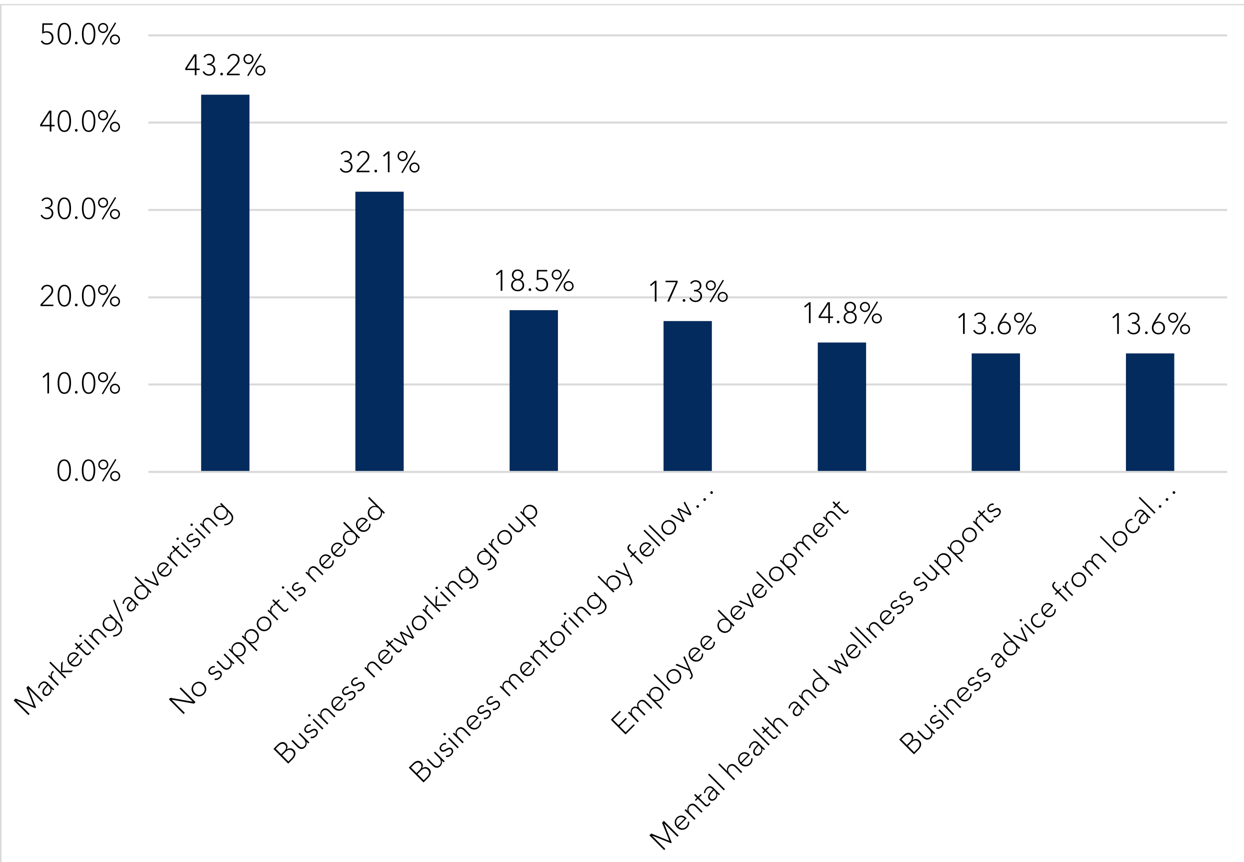
Figure 9: Which of the Following do You Consider to be Limiting Factors for Your Business? (N = 83)



[3] For any questions where percentage totals equal greater than 100%, it is due to respondents being eligible to select more than one response.

When asked what help or support their business needs right now, enhanced "marketing/advertising" was most often chosen, being selected by over two-in-five respondents (43.2%). The second most common selection (chosen by 32.1% of respondents) was that no support is needed. This suggests that many businesses in the area (nearly one-third) would prefer to address their challenges independently of external supports. There was no consensus options among those who selected "other" though supports addressing affordability, seasonality, and tourism diversification were mentioned.

Figure 10: What Help or Support Does Your Business Need Right Now? (N = 81)

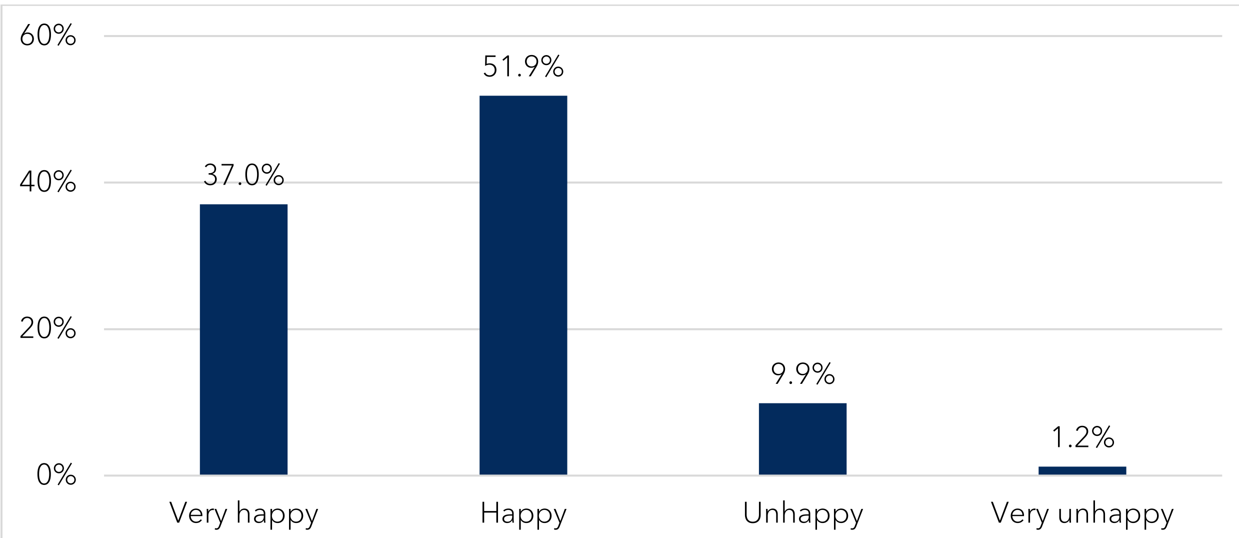


2.5. Local Workforce

2.5.1. Current Employees

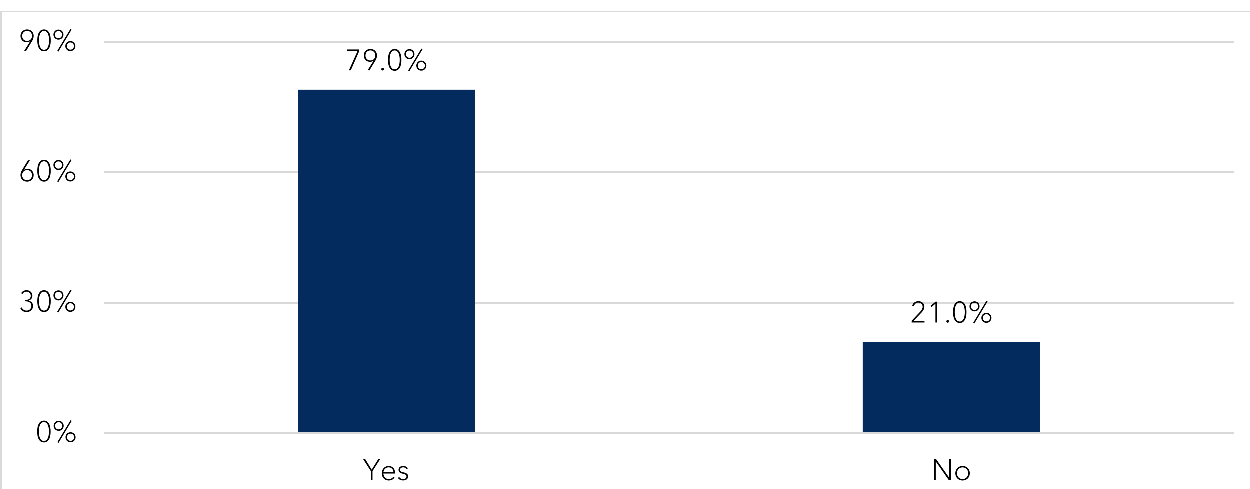
Businesses in Drumheller are generally pleased with their employees. To that end, 88.9% of those surveyed claimed to either be "very happy" or "happy" with their current workforce. Moreover, nearly two-in-five (37.0%) of respondents were "very happy" with their staff.

Figure 11: Are you happy with your current staffing complement? (N = 81)



Local businesses also appear to believe their employees are happy with them as employers, as 79.0% of respondents noted they "expect to be able to retain all their current employees."

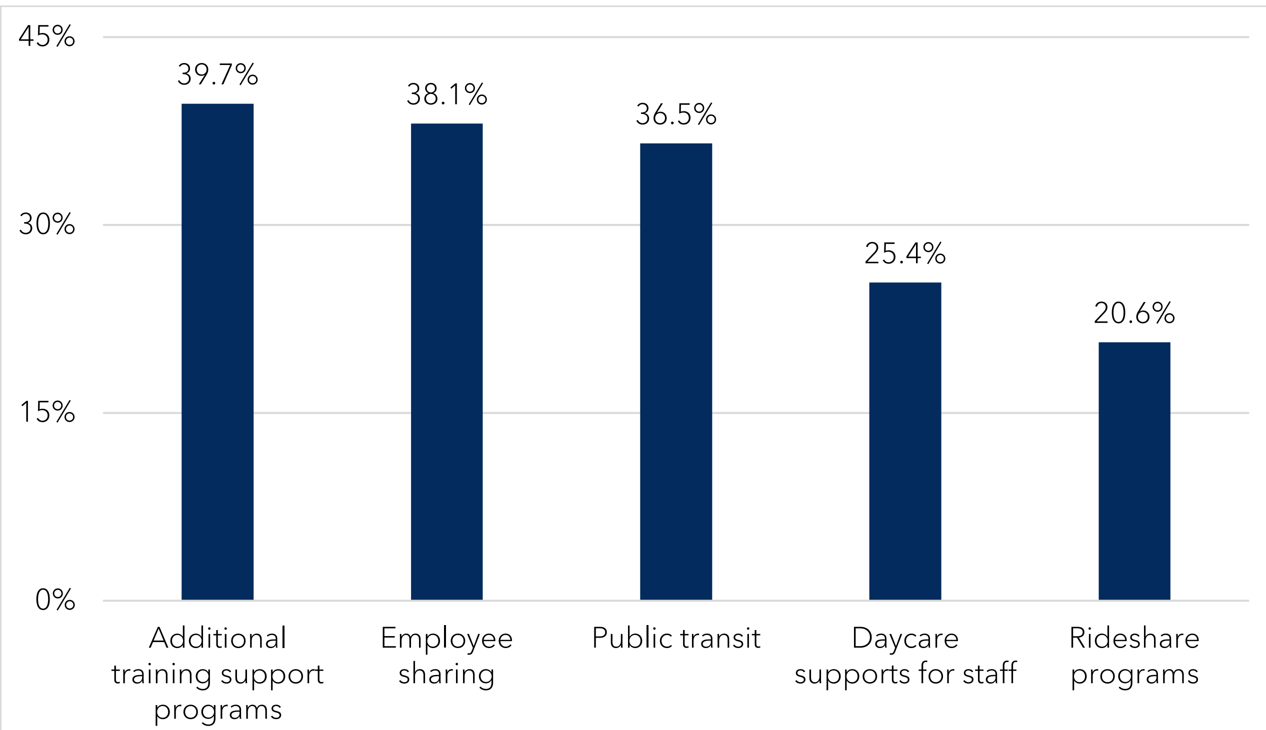
Figure 12: Over the next 12 months do you expect to be able to retain all your current employees? (N = 81)



When asked how employee retention could be made easier for businesses in the region, "additional training support programs" (39.7%), "employee sharing," (38.1%) and "public transport" (36.5%) were all noted by more than a third of respondents. However, a few respondents noted that while employee sharing was an interesting concept, it required centralized support and would not be relevant to all industries.

Respondents were also able to fill in an "other" option, where the most consistent theme to emerge was "housing." While not directly related to employment, many communities and businesses are struggling to offer housing that is affordable relative to typical salaries, as cost of living across the country has risen considerably. Struggles related to the overall cost of living in the area were consistently mentioned across a number of questions.[4]

Figure 13: In What Ways Could Employee Retention be Made Easier for Businesses in the Region? (N = 63)



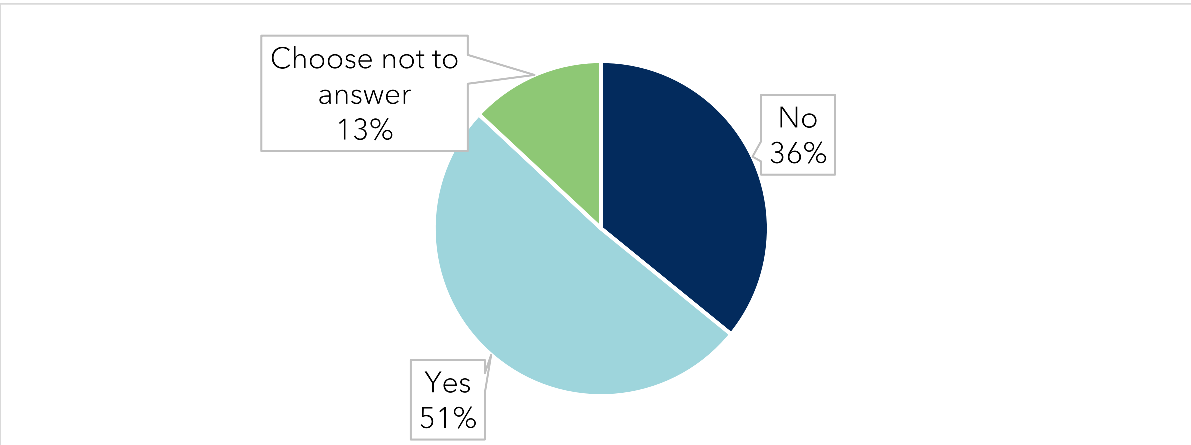
[4] Additional training support programs include offerings such as MH Enterprises, Employment Services programs, Government of Alberta on-the-job-training, or similar offerings.

Employee sharing is defined as sharing part-time employees between businesses to provide full-time work to a staff person.

2.5.2. Local Labour Pool

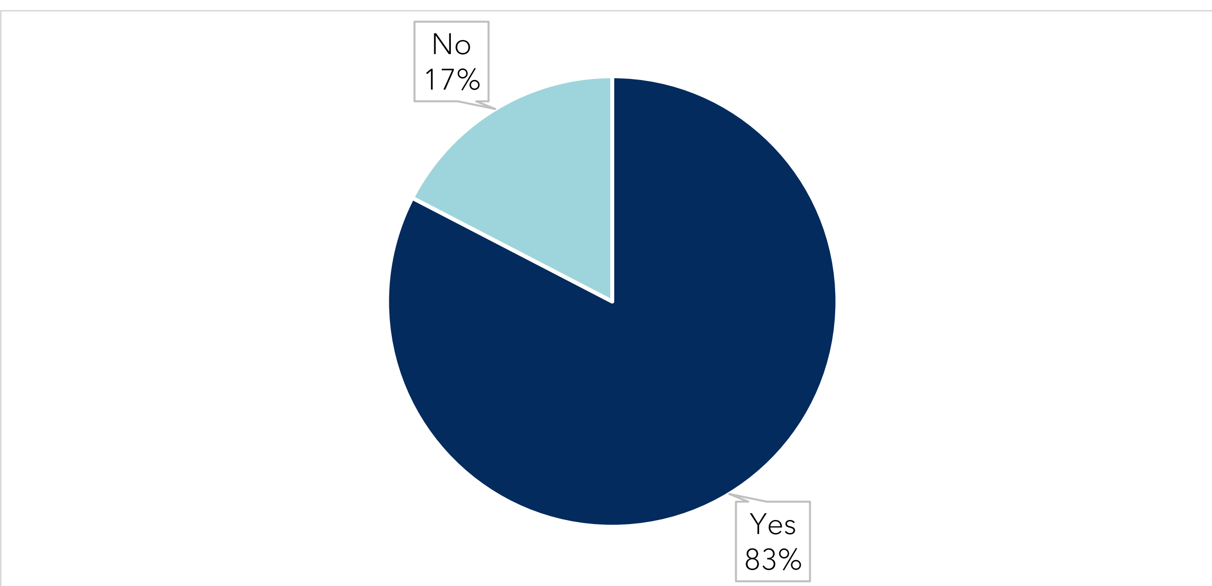
Similar to the positive outlook surrounding future operations (Figure 5), a general sense of optimism is clear among local respondents when they were asked about their hiring outlook. That is, 50% of respondents expect to hire at least one additional employee within the next 12 months, and only 36% were not expecting to hire any new staff.

Figure 14: Do You Expect to Hire Employees Over the Next 12 Months? (N = 92)



That positive outlook is tempered slightly, however, by the outlook of respondents regarding the process of hiring new employees. Specifically, of those who expect to hire at least one employee over the next 12 months, 83% of businesses felt they would encounter challenges in some form when hiring.

Figure 15: Do You Expect to Face Challenges When Hiring? (N = 46)



The above response rate is likely due in part to the overall feeling of satisfaction with Drumheller's *available* labour force. That is, only 2.5% of respondents felt the available labour force was "excellent", compared to 18.5% who felt it was "poor".

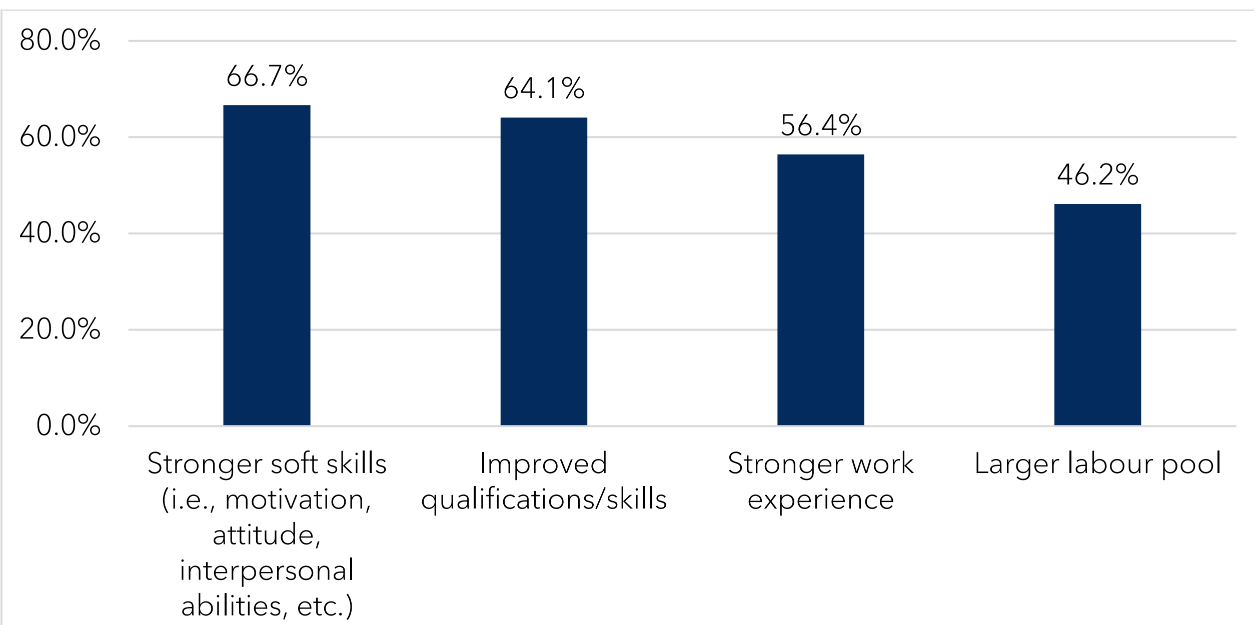
Table 23: How Would You Rate the Area's Available Labour Force? (N = 81)

Rating	Percentage of Responses
Excellent	2.5%
Good	23.5%
Fair	55.6%
Poor	18.5%

When asked how the labour pool could be improved, two-in-three (66.7%) of businesses wished applicants had "stronger soft skills (i.e., motivation, attitude, interpersonal abilities, etc.)." The other response noted by over 60% of respondents (64.1%) was "improved qualifications/skills."

"Other" responses centered around a lack of motivation to find work among potential applicants and additional comments regarding housing being an impediment to finding labour.

Figure 16: In What Ways Could the Available Labour Force Be Improved? (N = 102)

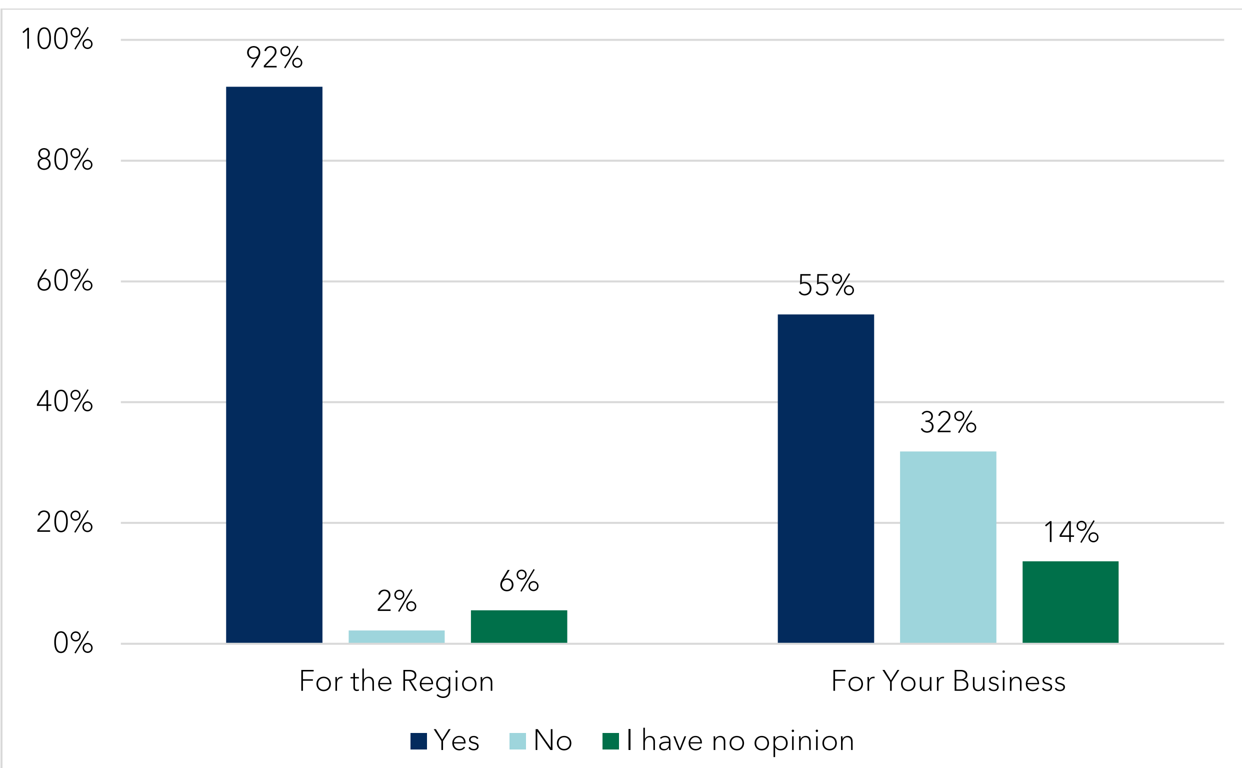


2.6. Tourism

Data provided in Section 1 made clear that tourism is a significant driver of economic activity within Drumheller and Starland County. It was estimated that tourism-driven sales in the area account for over $116 million annually, creating upwards of 1,270 jobs paying nearly $26 million in wages. At the same time, having a strong tourism sector does not inherently mean that its impact on the local economy and business community will be viewed in a positive light.

In the Drumheller area, however, tourism is overwhelmingly viewed as a positive among respondents. Of the 90 businesses who responded when asked whether they considered tourism a positive for the region, 83 (92%) answered "yes", five "I have no opinion", and only two considered tourism to not have a positive influence. At the same time, respondents were less likely to feel that tourism was a positive for their business, with 32% saying they did not view it as a positive. That these businesses felt the sector was not a positive for **their business** but was **for the region** suggests that overall, there is a sense of positivity around communal improvements and supporting the entirety of the local economy, a strong positive indicator of community engagement.

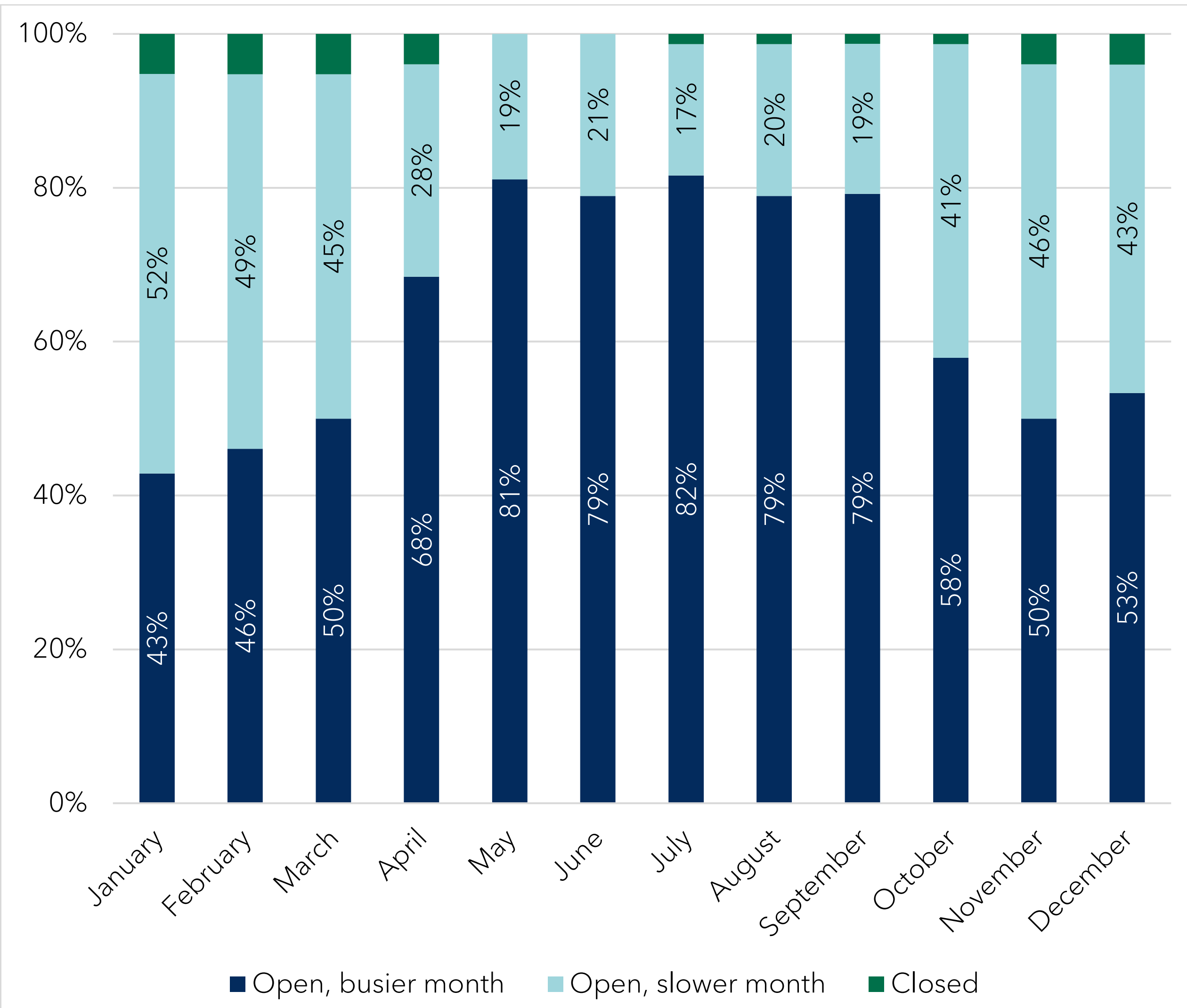
Figure 17: Do You Consider Tourism to be a Positive for the Drumheller Region? (N = 90) and Do You Consider Tourism in the Drumheller Region to be a Positive For Your Business? (N = 88)



Tourism's impact on the economy becomes clear when businesses reflected on busier and slower months for their organization. Figure 18 below shows clearly that May-September are significantly busier months, with April and October are fairly busy as well, while November-March is a much slower period.

Compared to the previous (2022) survey, Figure 18 shows a significantly expanded season, with substantial increases in the level of activity for businesses in May and September, as well as October. This should be seen as a considerable improvement given the importance placed on seeing more year-round tourism. To see an extended season by as much as 50-60% compared to the previous survey results is a tremendous success for the area.

Figure 18: What Months of the Year Are You Open for Business? (N = 77)

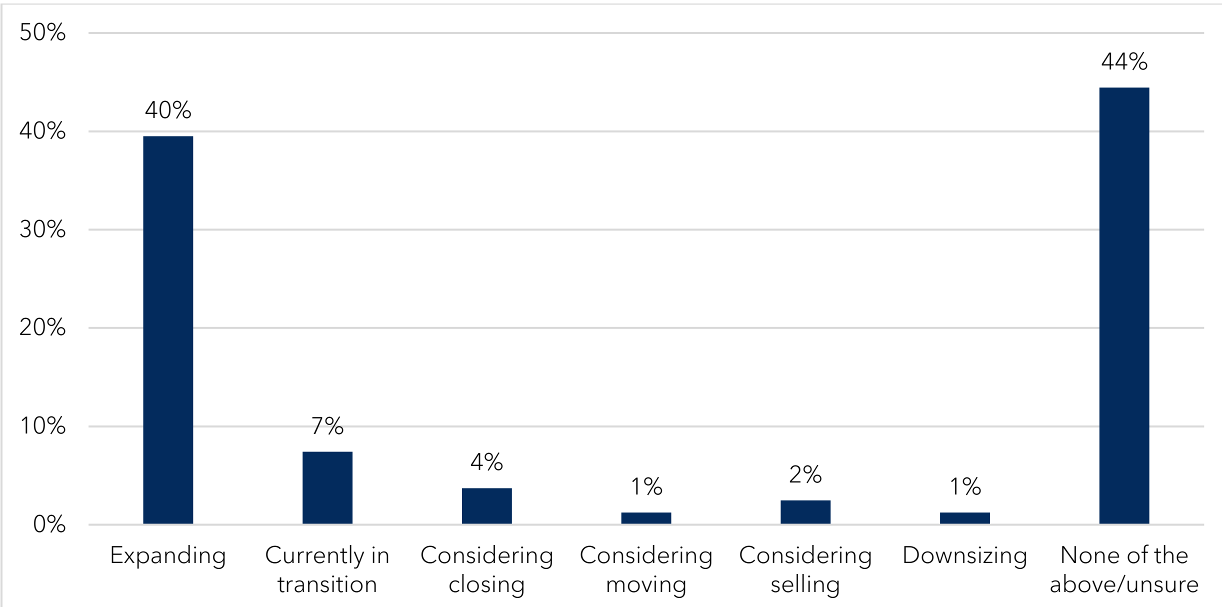


When asked what additional tourism advocacy efforts businesses would like to see supported, businesses often were not entirely sure. However, for those who provided specific responses, three key themes emerged:

1. Increased Promotion of the Drumheller Area – Many respondents emphasized the need for more advertising and marketing strategies to raise awareness, both domestically and internationally.
2. Tourism Infrastructure & Business Support – Concerns were raised about the need for better infrastructure, including roads, signage, parking, accommodations, and facilities. Some respondents also asked for more resources and supports for small businesses in the tourism sector.
3. Year-Round & Diversified Tourism – Many responses highlight the importance of expanding tourism beyond the summer months. As has been seen in many other communities undertaking similar work, there is an appetite for more off-season events and activities.

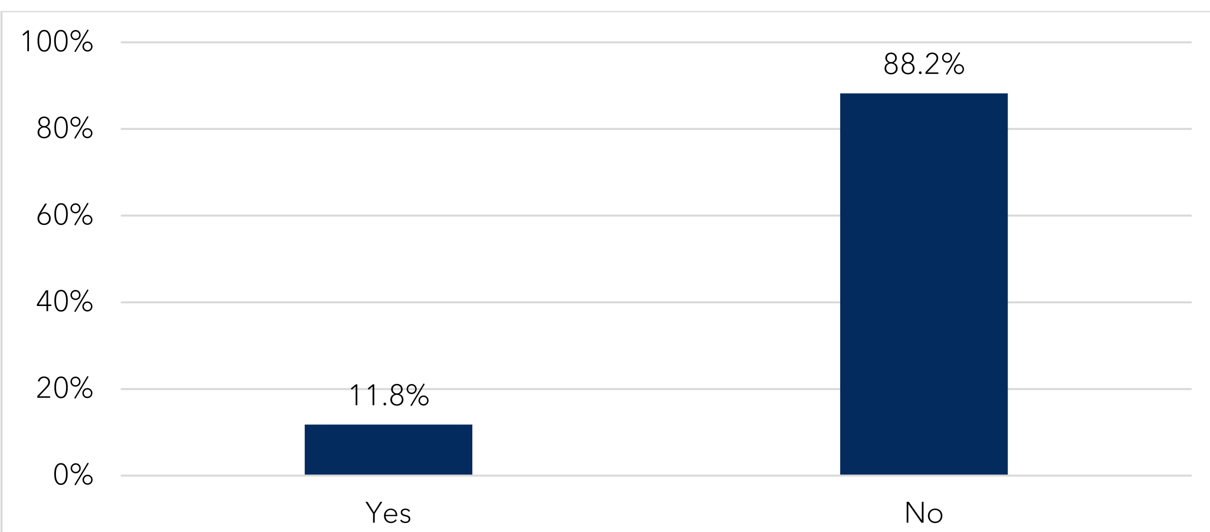
2.7. Succession

Figure 19: What Would Best Describe Your Plans for the Business Within the Next 2 Years (2025 and 2026)? (N = 81)



Typically, transition plans are an area where businesses look for support. However, for 88.2% of local businesses, assistance was viewed as not needed at this time. It is possible that this is due in part to the lack of interest, noted in Figure 19, of any form of transition in the near future.

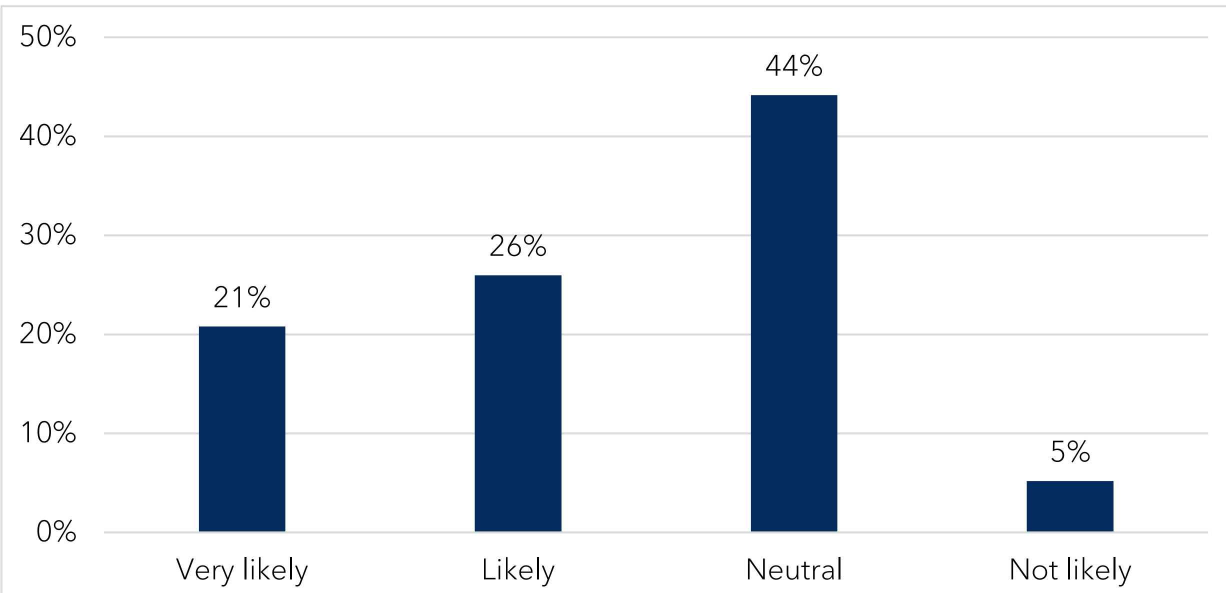
Figure 20: Do You Need Assistance with a Business Transition Plan or a Succession Plan? (N = 85)



2.8. Operating a Business in the Area

The survey sought to better understand the positives and negatives to operating a business in the Drumheller area. To gain a sense of overall satisfaction, businesses were asked how likely they are to recommend starting a business in the area. Only 5% were unlikely to recommend starting a business in the area, while 47% were either very likely (21%) or likely (26%) to do so. The remainder (44%) were neutral regarding their willingness to recommending the area to fellow entrepreneurs.

Figure 21: How likely are you to recommend starting a business in the area? (N = 77)



Next, to ensure local businesses had a chance to speak freely, businesses were asked four open-ended questions regarding the biggest perceived benefits and drawbacks of operating a business in Drumheller, whether they would still locate in Drumheller if they had to restart their business operations, and what is missing from the region from a business attraction standpoint. Responses were collected and summarized as key themes for each question.

2.8.1. Benefits to Operating in Drumheller (N = 71)

- Strong Community Support & Connections (45.1% of respondents) - Many respondents emphasized the close-knit nature of the community, local support, and word-of-mouth advertising were all flagged by businesses as strong benefits to the area.
- Geographic location (22.9%) - The area's location offers benefits such as access to oil fields, farming and ranching communities, and major highways. Respondents also noted that its proximity to larger centers while maintaining a small-town feel makes it an attractive place for both businesses and residents.
- Thriving Tourism Industry (18.1%) - Tourism was seen as a bit of a double-edged sword, as can be seen with the note on seasonality below. However, many did see tourism as a major economic driver, bringing in visitors who support local businesses.

2.8.2. Drawbacks to Operating in Drumheller (N = 72)

- Seasonality & Small Market Size (45.1% of respondents) - Many businesses noted that there can be a struggle with inconsistent customer traffic over the course of the year due to the heavy reliance on tourism. While sales are strong during the shoulder season, the off-peak period combined with a small population can make it difficult to sustain businesses year-round.
- High Costs & Tax Burden (22.9%) – Respondents highlighted what they felt were high local taxes, expensive utilities, property costs, and overall rising business expenses. Some respondents specifically noted that they felt these costs made the area uncompetitive compared to other nearby jurisdictions.
- Municipal Regulations & Lack of Business Support (17.6%) – Concerns include excessive regulations, slow municipal processes, and a perception that the town (residents and business-to-business, not the Corporation) is not business-friendly. There's also frustration with a lack of support for industries outside of tourism, limited housing development, and struggles in attracting and retaining a skilled workforce.

2.8.3. If you could start your business all over again, would you still locate in the area? (N = 74)

Respondents were very likely to confirm they would start their business in the Drumheller area if they had to "start all over again," with 76% saying they would, 13% saying they were uncertain, and only 10% stating they would not.

For those who would remain in the area if they had to start over, their two most common reasons were the **strong communal ties,** with businesses having a deep connection to the community, strong local support, and an appreciation of the relationships they had built and **uniqueness of the area,** noting that their business filled an important niche or meets a unique demand in the area, whether related to tourism, rural services, or specialized industries.

For those who were uncertain or would relocate, the two main reasons were **high costs of doing business locally** and the **seasonal consumer market and lack of growth potential.** These factors were seen as reasons that made doing business in the area more difficult than other centres nearby.

2.8.4. What is missing, from a business attraction standpoint? (N = 41)

Unsurprisingly, many of the missing pieces regarding business attraction were related to the challenges of maintaining operations, as noted above in 2.8.2. Specifically:

- **Diversification of Services (31.5% of respondents)** - Finally, many respondents felt that the lack of business support services (i.e., parts suppliers), niche needs (specialized healthcare) and retail options can make it difficult to entice new businesses (and their families) to move to the area.
- **Workforce & Infrastructure Challenges (29.3%)** - Respondents noted that from a business support standpoint, the lack of suitable, consistent labour was a challenge, as was a lack of housing options, transportation services, and flexible commercial spaces (i.e., spaces that fit the needs of different business types).
- **Year-Round Tourism & Attractions (26.8%)** - Again noting that there are challenges with sustaining operations year round, businesses felt this challenge would lead to non-established businesses hesitating to invest locally.
- **Business Incentives & Lower Costs (19.5%)** - Many respondents felt there was a need for lower business taxes, grants, and incentives to attract and retain businesses in the area, especially as it compares to surrounding areas.

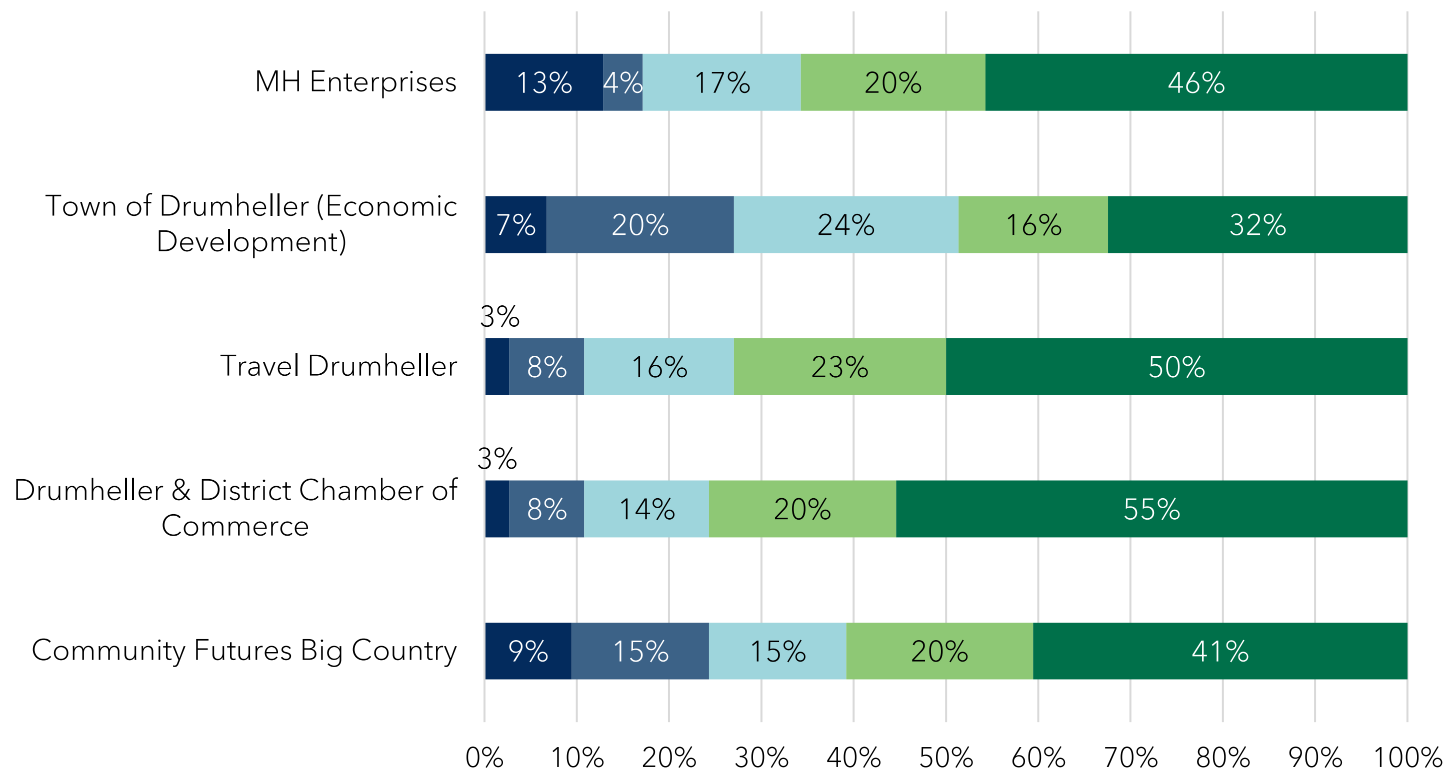
This last point was supported by a follow-up question asking "considering the local business environment, would your business benefit from "more similar businesses, more complimentary businesses, or a greater range of businesses and services." While only **7% of respondents wanted more similar businesses**, **34% thought they would benefit from more complimentary businesses** and **75% felt there organization would benefit from an overall greater range of businesses and services** in the area.

2.9. Familiarity with Partners

Respondents were asked to rate, on a scale from 1 (have not heard of the organization) to 5 (very familiar with the organization), how familiar they were with each of the five partner organizations (Community Futures Big Country, Drumheller & District Chamber of Commerce, Travel Drumheller, Town of Drumheller – Economic Development, and MH Enterprises).

Generally, each of the four partners are well known, with over 70% of respondents selecting answers between "3" and "5" for each of the organizations and over 30% of respondents being "very familiar" with each of the organizations.

Figure 22: How Familiar are You with the Following Organizations and Their Roles? (N = 74)



	Community Futures Big Country	Drumheller & District Chamber of Commerce	Travel Drumheller	Town of Drumheller (Economic Development)	MH Enterprises
1 (have not heard of organization)	9%	3%	3%	7%	13%
2	15%	8%	8%	20%	4%
3	15%	14%	16%	24%	17%
4	20%	20%	23%	16%	20%
5 (very familiar with the organization)	41%	55%	50%	32%	46%