



TOURISM & COMMUNITY

RESULTS OF THE TOURISM TOGETHER
RESIDENT SURVEY

NOV 2022

GROUP
NAO

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About: This report was produced by Group NAO for Banff and Lake Louise Tourism as part of the work with the first 10-Year Vision for Tourism in Banff and Lake Louise to be published in early 2023.
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FOREWORD

WHY THIS SURVEY?

How is tourism impacting our communities today, and what kind of role and impact should tourism have in the future? These are the overarching questions motivating this resident sentiment survey in the communities of Banff National Park.

The aim of the survey is to get first-hand testimonies, ideas and visions for the future of tourism in the Park and its communities as Town of Banff, Parks Canada, Banff & Lake Louise Tourism and other tourism partners to come together to create the first 10-Year Vision for Tourism in Banff and Lake Louise towards 2032.

Tourism is more than economic activity. Tourism is also a cultural and social activity which has an impact on everyday living as well as the quality of life in the community.

This survey is a tool to strengthen understanding of resident sentiment and attitudes to the sustainable future of visitation to Banff National Park. It is recognized that the success of future tourism development to Banff National Park is very dependent on the positive participation and support of residents.

Thus, this survey will help identify:

- How residents perceive quality of life – and what residents value and care about in defining “the good life” in Banff National Park.
- What concerns residents when it comes to tourism to the Park – the core benefits, as well as most important issues as perceived and experienced within the communities.
- “The tourism we want” – as described by the residents – and based on this, the ideas and best advice residents have with regards to future destination leadership and sustainable development.

SUMMARY

LIFE IN BANFF IS A PRIVILEGE, BUT...

STRONG LOVE OF PLACE

Overall, residents in Banff National Park (BNP) feel very privileged to live in the middle of magnificent nature, and they express a deep love of place along with a strong sense of responsibility for both nature and community. Quality of life comes with rich recreational and outdoor activities, and - for most – a safe and family friendly community.

Fundamentally, the vast majority of residents within BNP recognize the importance of tourism as the dominant economic driver of the community – extending beyond the tourism businesses themselves.

Half of BNP residents feel that the impact of tourism is more positive than negative. But from there, opinions differ, and most people agree that tourism has a negative impact on the natural environment, wildlife, cost of living, traffic and, ultimately, quality of life for the locals. In other words: Residents feel there is a high price to be paid for living in a tourism hotspot.

KEY OBSERVATIONS

In this resident survey of more than 1700 residents in Banff National Park, the key messages from the community can be summarized in the following observations:

- Living in BNP is a great privilege and responsibility: A good 90% of the respondents feel privileged to live in BNP, and there is almost unanimous agreement that there is a special obligation to protect and preserve the Park (95%). Living in or close to nature is highly valued by almost everyone.
- The great thing about living in BNP (using some of the respondents' own words) is “living at the doorstep of stunning nature”, the mountains, the wildlife, the beautiful every day – and all the ways you can actively enjoy it year-round. It is also the safe and friendly community – the social fabric of living in a small town where we know and trust each other. Almost 1.300 open statements from residents say more or less the same.

SUMMARY // KEY OBSERVATIONS

- **Tourism is important, but we have big issues.** Almost 8 out of 10 residents recognize that tourism is important for the community and, not surprisingly, especially for the local economy (85%). But from there, opinions divide: About 35% feel that tourism has more positive impact than negative, but almost 33% disagree. And, when asked specifically, the vast majority believe tourism has a negative impact on traffic and parking (91%), waste and pollution (86%), nature and wildlife (80%) and the cost of living (73%). 7 in 10 believe that there are too many visitors in the Park in general and 6 in 10, that there are too many visitors where they live. Almost 2 in 10 feel that tourism creates problems in their daily lives year-round - 70% say it is only at certain times of the year. Ultimately, 6 in 10 residents feel that tourism has a negative impact on their quality of life.
- **Cost of living, climate and environment are top concerns.** Almost 90% of respondents are concerned with cost of living, closely followed by concerns over the availability of affordable housing (87%). Almost 8 in 10 are concerned about pressure on nature and biodiversity. Traffic and parking is also a high-level concern. About half of the respondents are concerned about crime and substance abuse, employment opportunities and social inequality.
- **Residents want to see action for a sustainable future.** When asked about their visions for the future; better management of visitor pressure is top of the list, closely followed by initiatives to educate visitors to be mindful of nature and culture. In other words, residents of BNP want better destination management and more responsible visitor behaviours. Protecting the environment in general is a top priority for half of the respondents. 15% and 11% respectively call for more Indigenous tourism and a focus to advance truth and reconciliation as part of the tourism development in BNP.
- **The tourism we want in the future.** When asked openly what they want to see from tourism in the future, respondents have more than 1.100 propositions. Nobody is calling for destination marketing or promotional activities that will attract more tourists come to BNP. On the contrary, there is a major call for destination management tackling “overtourism” and “getting people out of the damn cars”. People want better tourism to Banff National Park – and, in many cases, also less tourism. And they want to see “the tourism community” working for a more balanced and sustainable tourism to and within the Park.



SUMMARY // KEY OBSERVATIONS

NEED FOR DESTINATION LEADERSHIP

Reading across the data material, it is clear that the community of the Town of Banff in some ways is unbalanced, as residents feel flooded by visitors to the point that it reduces their quality of life. It is in itself a bit of a paradox, because the Town of Banff is historically and legally founded on tourism as the base for settlement and community building. Tourism is the *raison d'être* of Banff.

It is striking both how consistent the data material is – there is wide agreement on the issues and needs for the future - and also how results echo previous works, plans and reports on the topics. In other words: This is not new.

The overall recommendation is very clear: **There is a strong wish and demand for sustainable destination leadership and management – structured and consistent actions to balance – and in some regards limit - tourism flows (especially traffic) and to address the negative impact of tourism on nature and climate.** This is a message to all the major institutional parties within the Park and the tourism community. It is time to initiate action – together.

The risk, if nothing is done, is that that the tourism sector will jeopardize its social license to operate, and that decisions and regulations are formed out of conflict and frictions rather than common vision and foresight. The good news is that Banff and Lake Louise are communities with a widely shared commitment to nature and a strong love of place.

This also becomes evident when reading across all three of the surveys carried out during the Tourism Together initiative. The two other surveys have sampled tourism parties (typically business owners and decision makers) and tourism employees, respectively. All three surveys converge in the appreciation and respect of nature and community wellbeing.



ABOUT THE SURVEY

WHAT WE DID

This report was produced by Group NAO for Banff and Lake Louise Tourism as part of the Tourism Together process towards a new 10-Year Vision for Tourism in Banff and Lake Louise.

- The survey was designed as an online survey targeted at residents within Banff National Park.
- The survey consists of a set of background variables and 5 batteries of statements including 17 questions and 5 open questions. There was an incentive of \$500 by random draw, to take part in the survey.
- Data was collected over 4 weeks in June 2022 after three public calls/advertisements for participation.
- A total of 1,578 residents in Town of Banff, Lake Louise & elsewhere within Banff National Park responded to the survey with a completion rate of 72%.
- All data has been analyzed and reported by Group NAO.

HOW TO READ

The report falls in the following sections:

- **Who are they?** Below, a page summarizes who are the respondents by background variables such as age, gender identity, place of living etc.
- **The good life in BNP:** The first section (from page 10) focuses on the overall satisfaction with life in Banff National Park.
- **Concerns and challenges:** In section two, we look at the challenges and concerns respondents might have with tourism today and in the future.
- **General attitudes to tourism** are presented in section three including the perception of tourism impact.
- **Residents' wish list for the future of tourism** to Banff National Park is reported in section 4.
- Finally, in section 5, we dive into the differences between different segments of respondents.

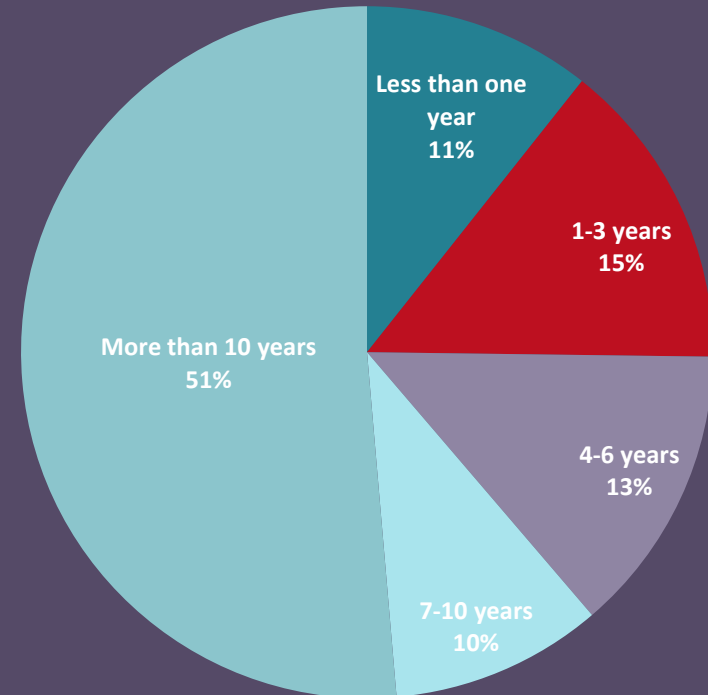


FINDINGS: WHO PARTICIPATED?

RESPONDENTS BY BACKGROUND

- 86% from Town of Banff
- 83% Canadians
- 59% identify as women
- 76% under 55 years of age
- 13% have high school education and some courses
- 62% have completed undergrad college or more

HOW LONG HAVE YOU LIVED IN BNP?



n = 1.578



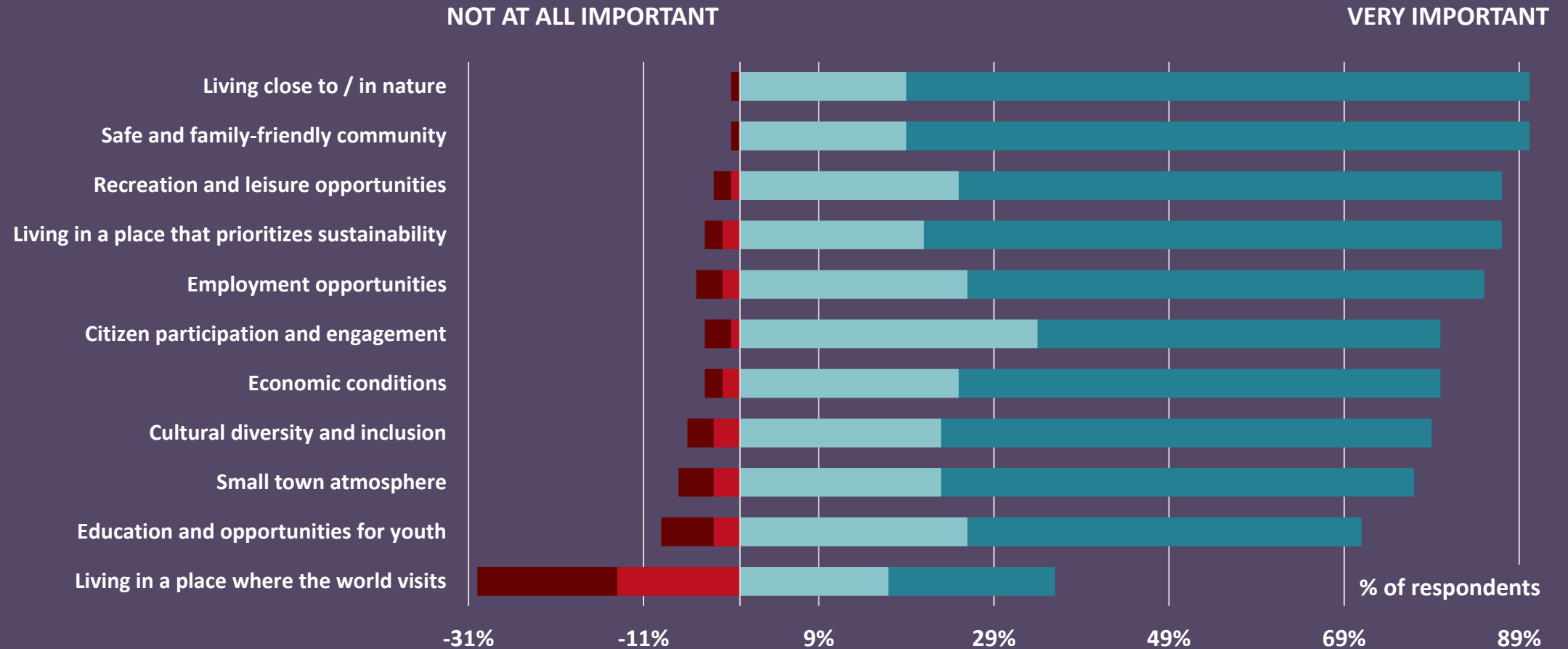
PART 1: THE GOOD LIFE IN BNP

What is important to residents and how satisfied are they with their quality of life in Banff National Park?

THE GOOD LIFE – WHAT’S IMPORTANT?



In your view, how important are the following factors to a good life in Banff National Park?



n = 1.316

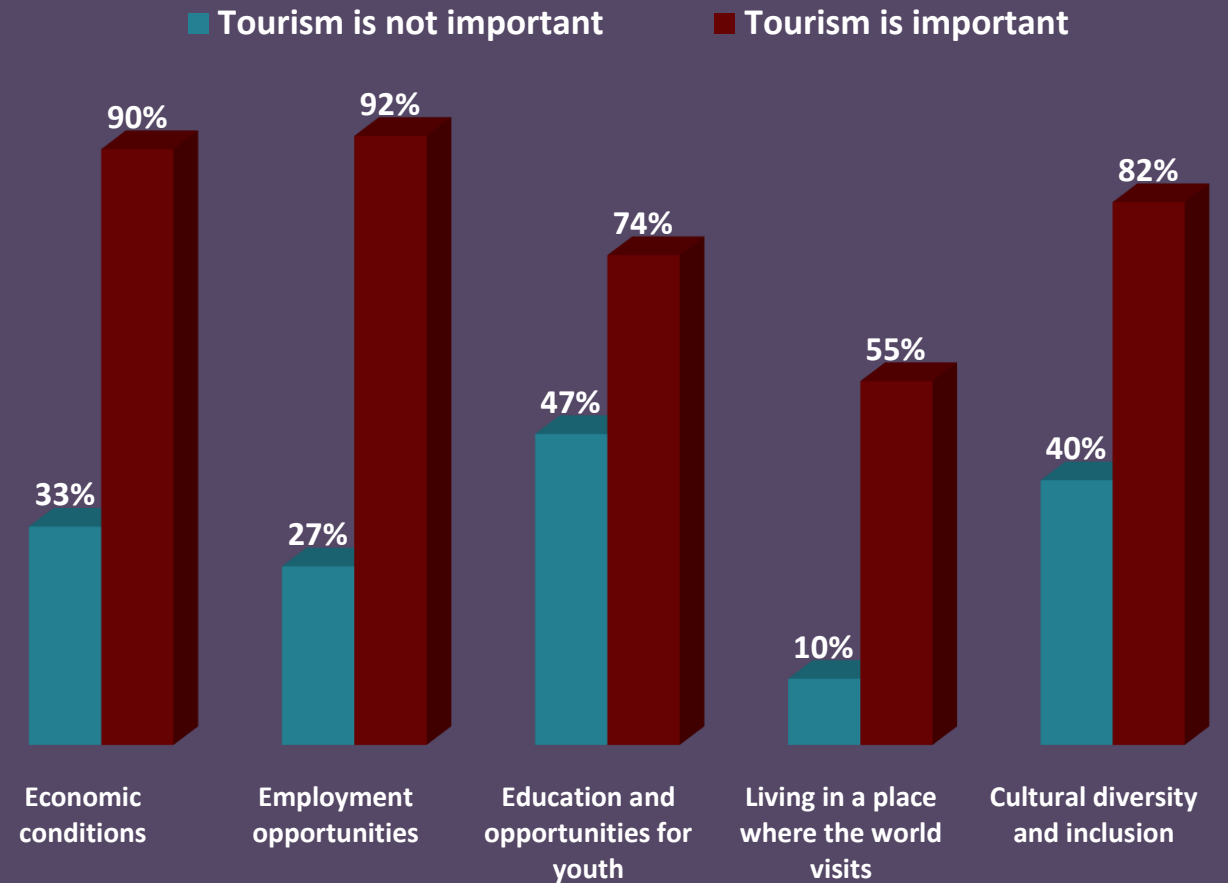
Note: Bars does not add to 100% as neutral answers are excluded

TOURISM CAN BE A DRIVER



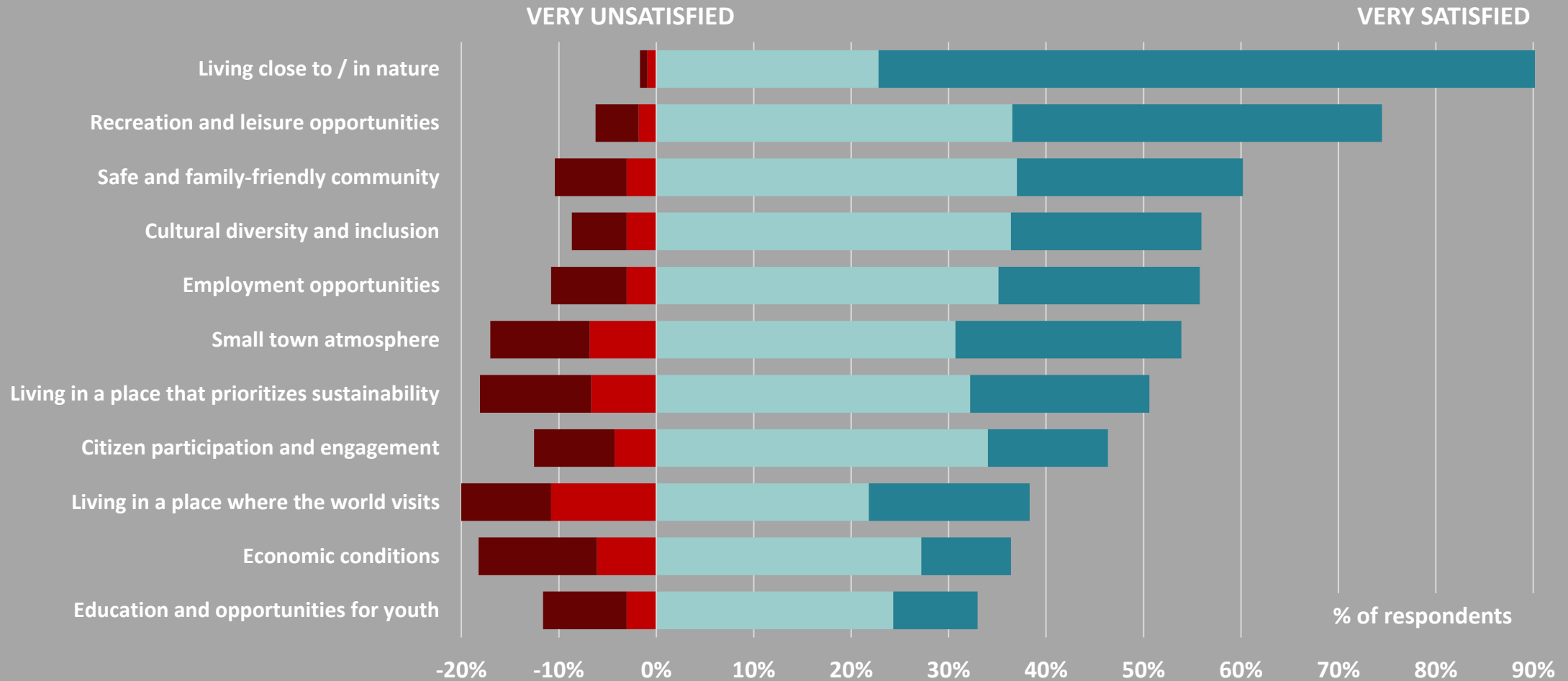
Taking a deeper look at the data, we find some significant differences according to background variables:

- Residents of Lake Louise focus more on “small town atmosphere” and citizen participation. Safety and youth opportunities are more important for residents in the town of Banff.
- Long time residents find safety and small town atmosphere important.
- Respondents that identify as women tend to value social factors of life as more important – e.g. cultural diversity (+12%).
- Respondents who think tourism is important to BNP - tend to think a lot of other factors are also important for the good life in Banff– both economic conditions, employment opportunities, educational opportunity as well as cultural diversity and inclusion . See chart.



SATISFACTION WITH LIFE IN BNP

How would you rate your satisfaction with the following aspects of the community you live in?



n = 1.316

Note: Does not add to 100% as neutral answers are excluded

MID-LIFE RESPONDENTS ARE LESS SATISFIED

LIVING IN BNP IS A PRIVILEGE

Overall, 91% of residents in the survey feel privileged to live in BNP. More than 80% feel very privileged. Still, looking closer we find that...

- Older residents are generally more satisfied with all factors of life in BNP - illustrated by the graph to the right. The least satisfied age group is from 25-44.
- Mid-lifers tend to be less satisfied with resident participation and living in a tourism hot spot.
- Newcomers to the communities are the most satisfied, while the residents who have stayed in the Park over 1-6 years are least satisfied.
- Respondents familiar with Town of Banff Incorporation Agreement (TOBIA) are slightly more satisfied than respondents who never heard of it.
- Respondents that identify as women are generally more satisfied with all factors of life in BNP.

HOW SATISFIED ARE YOU WITH THE FOLLOWING ...?



n = 1.316

WHAT MATTERS VS SATISFACTION

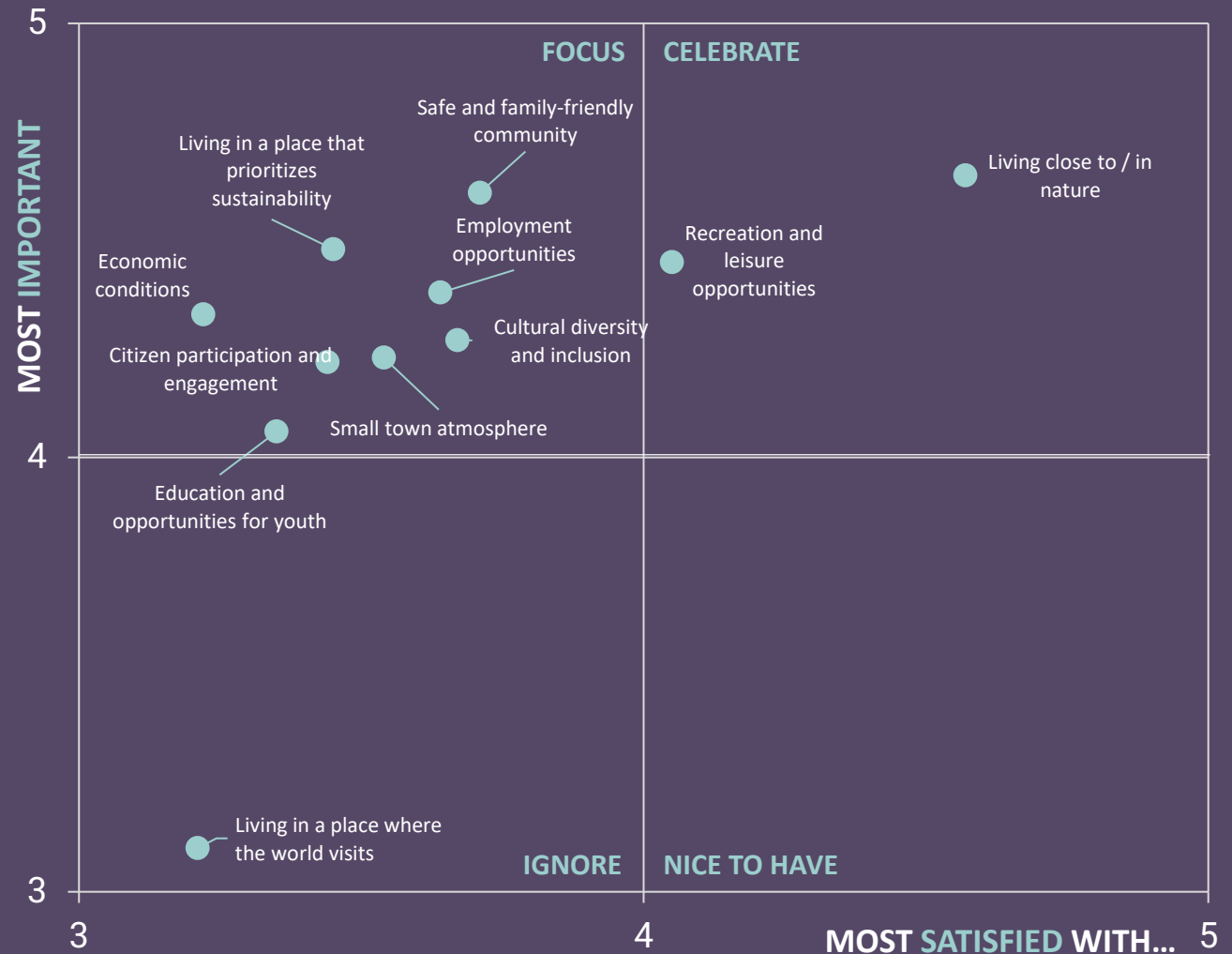
COMMUNITY OF NATURE LOVERS

The matrix to the right shows what residents think is important to their quality of life (vertical axis) versus how satisfied they are with the same factors (horizontal axis).

“Living close to nature” and the recreational opportunities that come with it are clearly both to the satisfaction of residents and very important for their quality of life.

Opposite, in the lower left corner, we find “Living in a place where the world visits” is neither important nor providing satisfaction.

In the upper left corner – in the “focus area” - are issues that are important for the quality of life for the residents, but they are also issues that they are not entirely satisfied with today.





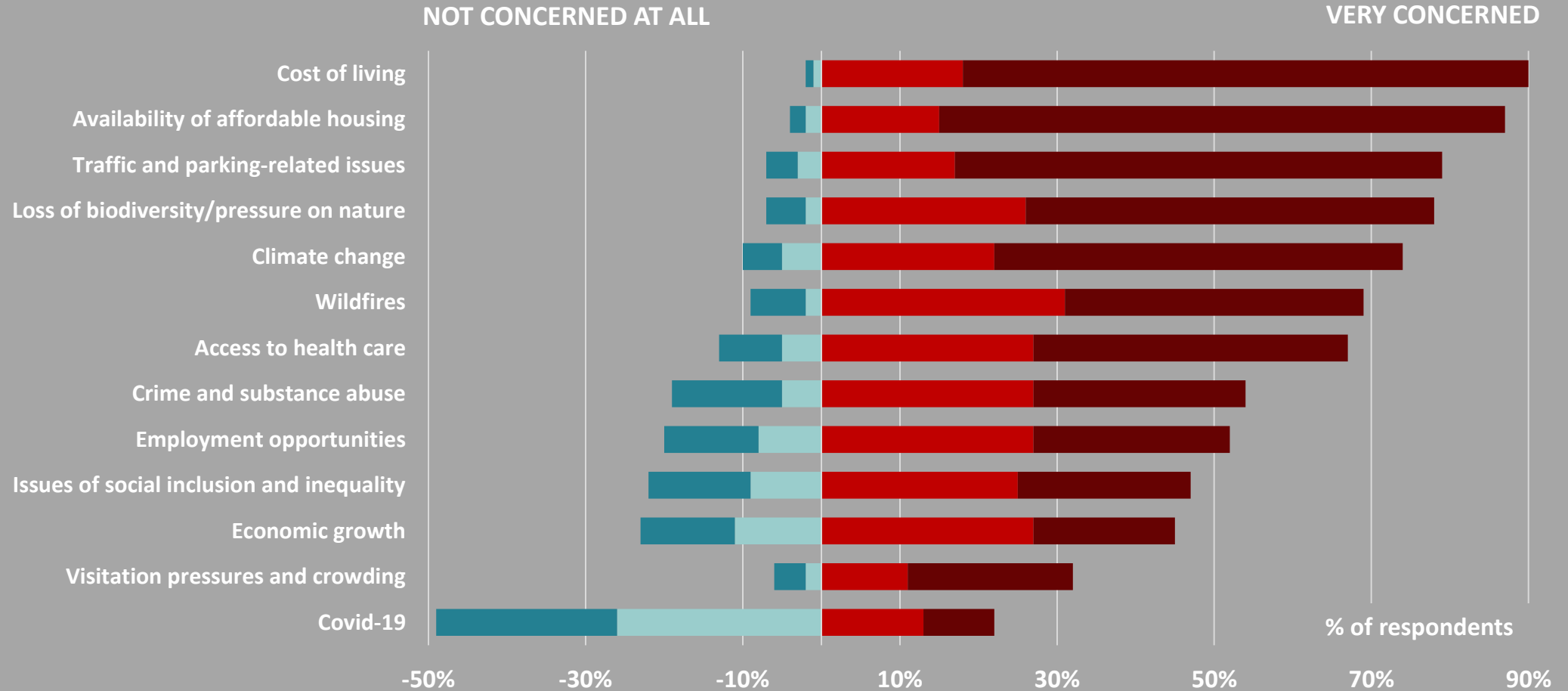
PART 2: CHALLENGES AND CONCERNS

*What are the concerns and challenges of residents
in Banff National Park?*



LIVING IN BNP IS EXPENSIVE

How concerned are you about the following issues and their impact on your community ?



n = 1.316

Note: Does not add to 100% as neutral answers are excluded

OLDER RESPONDENTS ARE MOST CONCERNED

VERY SATISFIED, YET CONCERNED

While the older segments are generally very satisfied with life in Banff National Park (see also section 1), they tend to be more concerned about various issues.

The table illustrates that older respondents are more concerned about the issues in general, but especially traffic, crowding, wildfires and health care.

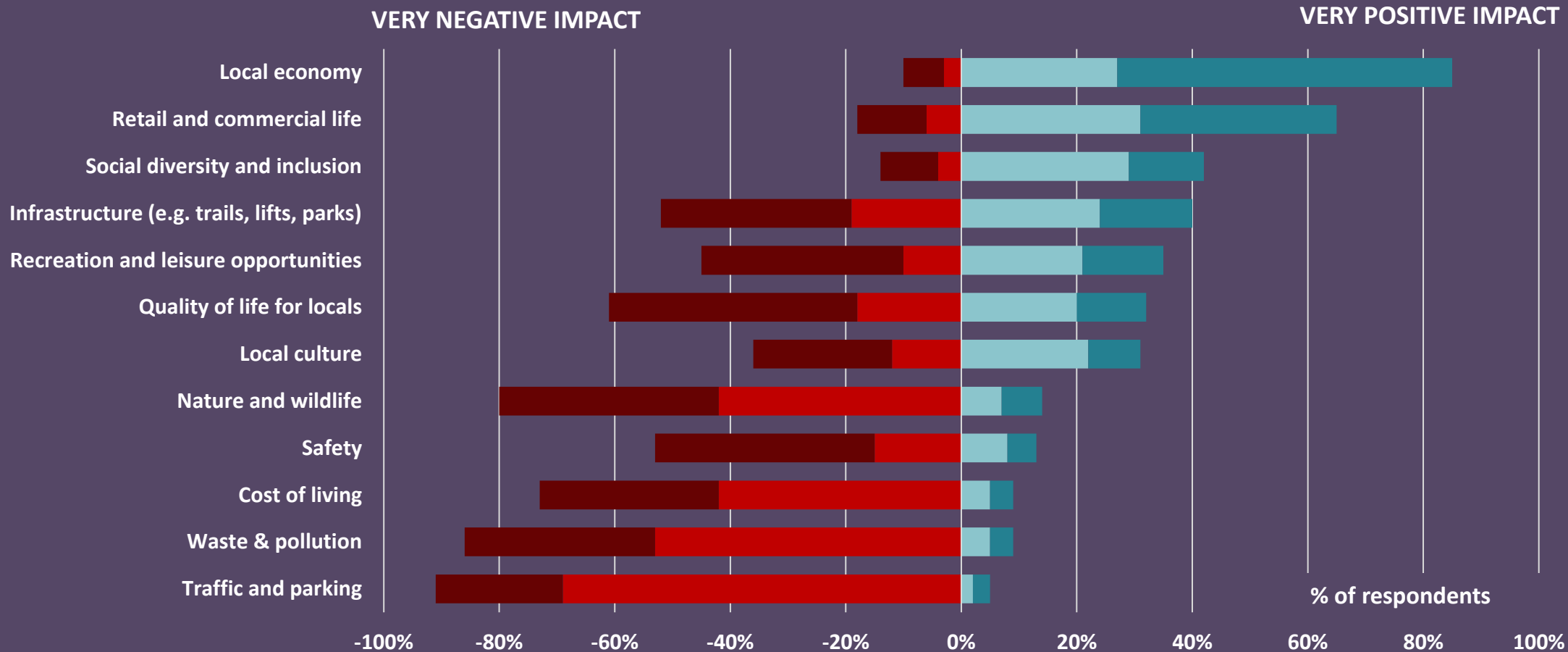
HOW CONCERNED ARE YOU WITH THE FOLLOWING FACTORS?	AGE		
	18-24	35-44	65+
Traffic and parking issues	58%	77%	90%
Wildfires	57%	67%	82%
Access to health care	46%	63%	87%
Economic growth	36%	45%	50%
Issues of social inclusion / inequality	46%	48%	56%
Crowding	76%	84%	88%

PART 3: ATTITUDES TOWARDS TOURISM

*What is the impact of tourism on people, place
and park - according to residents?*

IMPACT OF TOURISM

What impact does tourism have on the following in your community?



n = 1.228

Note: Does not add to 100% as neutral answers are excluded

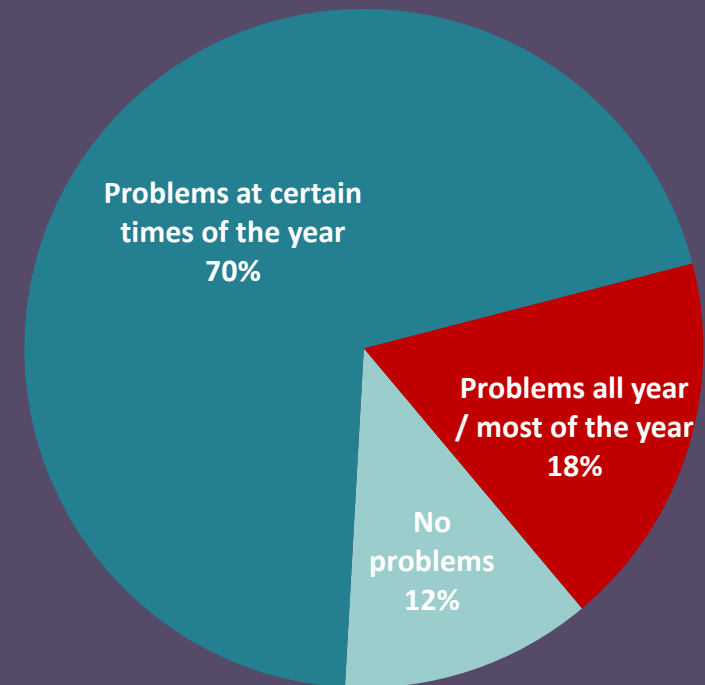
MANY EXPERIENCE TOURISM-RELATED PROBLEMS



TO WHOM IS TOURISM A PROBLEM?

- **More women** find tourism problematic than men.
- **Respondents below 44 years old** are slightly more likely to find tourism problematic.
- **Residents less satisfied** with living in BNP are more likely to find tourism problematic for part of the year or year-round.
- **Tourism is far more important** to residents who do not experience any problems.
- **Concerns and problems go hand in hand:** The more concerned residents also experience more problems with tourism - except when it comes to concerns over economic conditions, where it is the opposite correlation.
- **Different priorities for the future:** There are significant differences regarding the future priorities for BNP. The residents who see tourism as a problem are significantly more focused on sustainability and destination management.

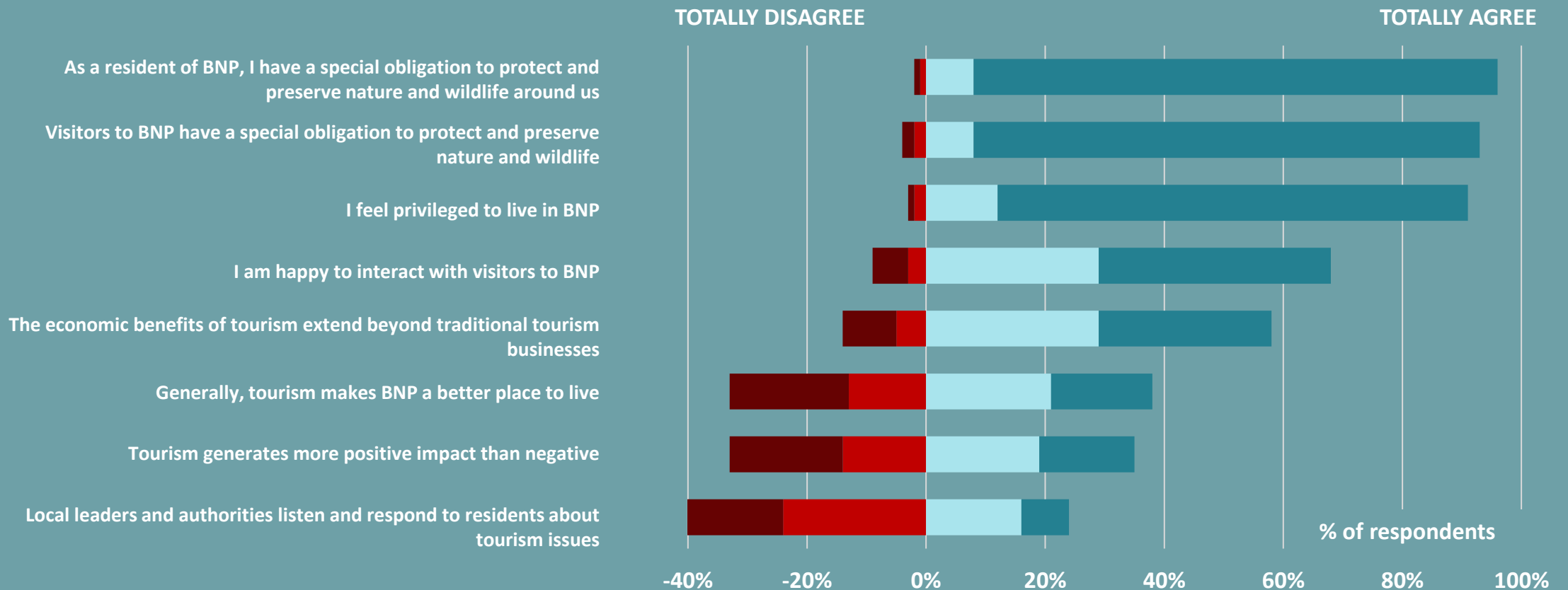
Does tourism create problems for you in your everyday life?



n = 1.228

WE HAVE AN OBLIGATION TO PROTECT

To what degree do you agree with the following statements?



HOW IMPORTANT IS TOURISM?



BANFF & LAKE LOUISE ARE MONO-ECONOMIES

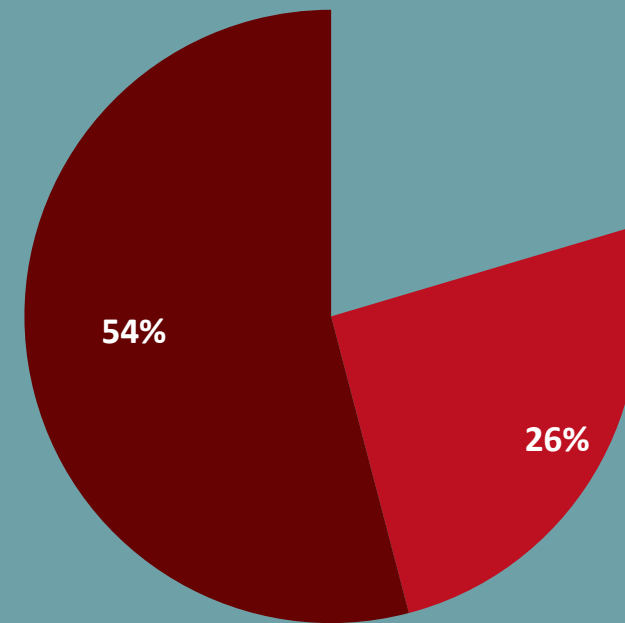
Banff and Lake Louise are almost exclusively mono-economies, with the visitor economy being the predominant economic sector. This is recognized by almost 8 in 10 residents who find tourism to be important or very important for the community.

The remaining 20% tend to be...

- Long time residents
- More than 44 years old
- Men (66%)
- Households with 1-2 people (66%)

... and very concerned with overcrowding.

How important is tourism to the community?



■ Important ■ Very important

n = 1.228

TOO MANY VISITORS?

NO NEED FOR MORE VISITORS

A solid majority of residents in BNP see no need for more tourists. Almost 7 in 10 feel there are too many visitors in the Park in general - especially same-day visitors.

A little less than half of respondents feel that the number of domestic and regional visitors is just about right.

It is especially the older respondents (+65) who think there are too many visitors to the Park today (across all visitor segments, but especially one day visitors and visitors from near by communities).

On the other hand, almost a third of mid-life respondents would like to see more international visitors to the park.

What do you think about the number of visitors in Banff National Park...?

WHEN IT COMES TO...	Too many	Too few	Just right
Same-day visitors	69%	3%	28%
Regional visitors (nearby communities)	44%	11%	45%
Domestic visitors (from other parts of CA)	39%	15%	46%
International visitors (outside of Canada)	43%	23%	34%
... in the park in general	69%	6%	25%
... in the area where I live	59%	4%	37%

n = 1228

VISITATION VS. QUALITY OF LIFE

What is the impact of tourism on your quality of life vs what do you think about the number of visitors to BNP?

QUALITY OF LIFE AND ATTITUDE TOWARDS NUMBER OF VISITORS

- Respondents who think tourism has an overall positive impact on quality of life in BNP tend not to see the number of visitors as a problem
- Respondents who think tourism has a negative impact on their quality of life, also think visitation should be reduced across all visitor segments
- Respondents who feel tourism has a negative impact on quality of life, are also very likely to think that there are too many same-day visitors in the park (81%).

Overall, about one third of respondents think tourism has a positive impact on their quality of life – and roughly half of these think BNP has too few or just the right number of visitors (not shown in the chart).



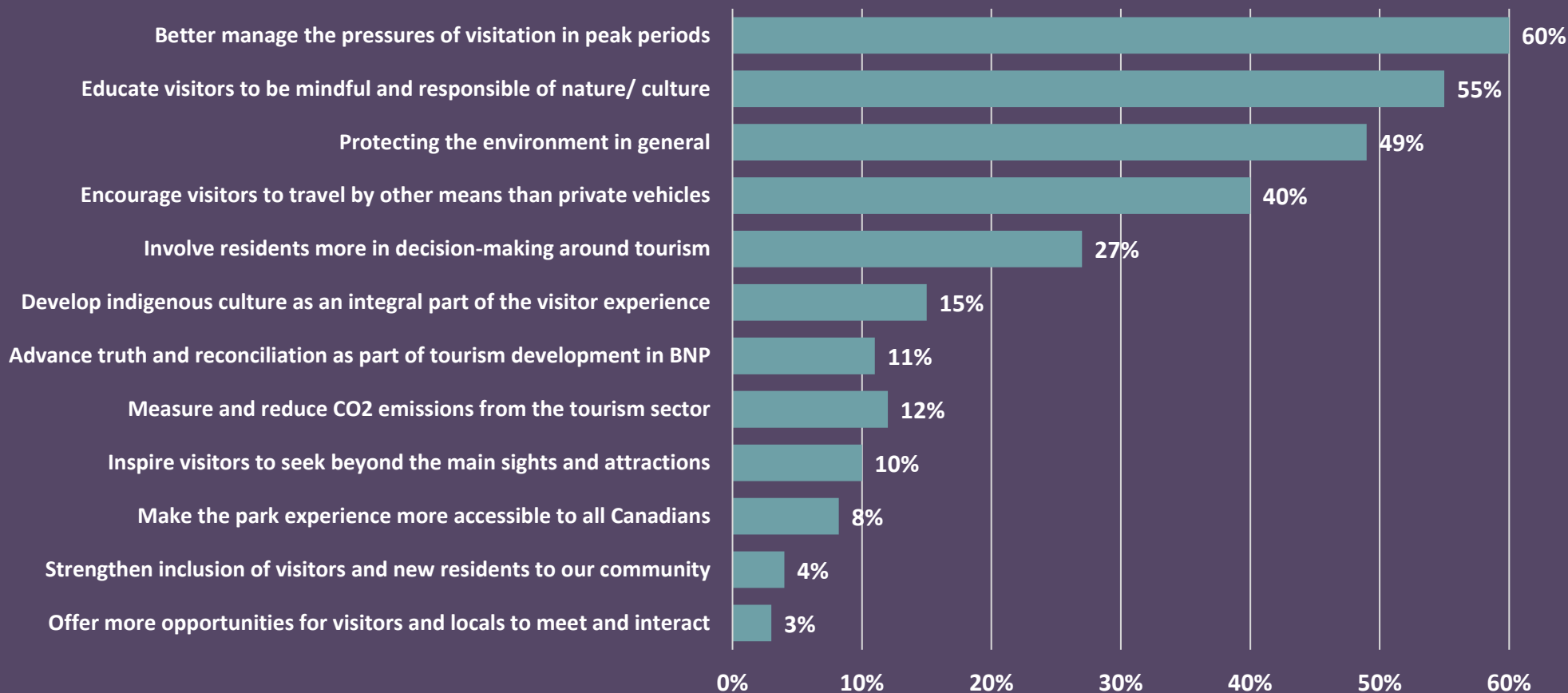


PART 4: VISION FOR THE FUTURE

What are the most important priorities for the future?

FUTURE PRIORITIES FOR TOURISM

What are the most important priorities for a sustainable future of tourism in BNP towards 203? (Max 3)



n = 1.228

Note: Respondents could pick max three of the statements above



PART 5: SEGMENTS

*The young, elderly, newcomers to BNP...
How and where opinions differ?*



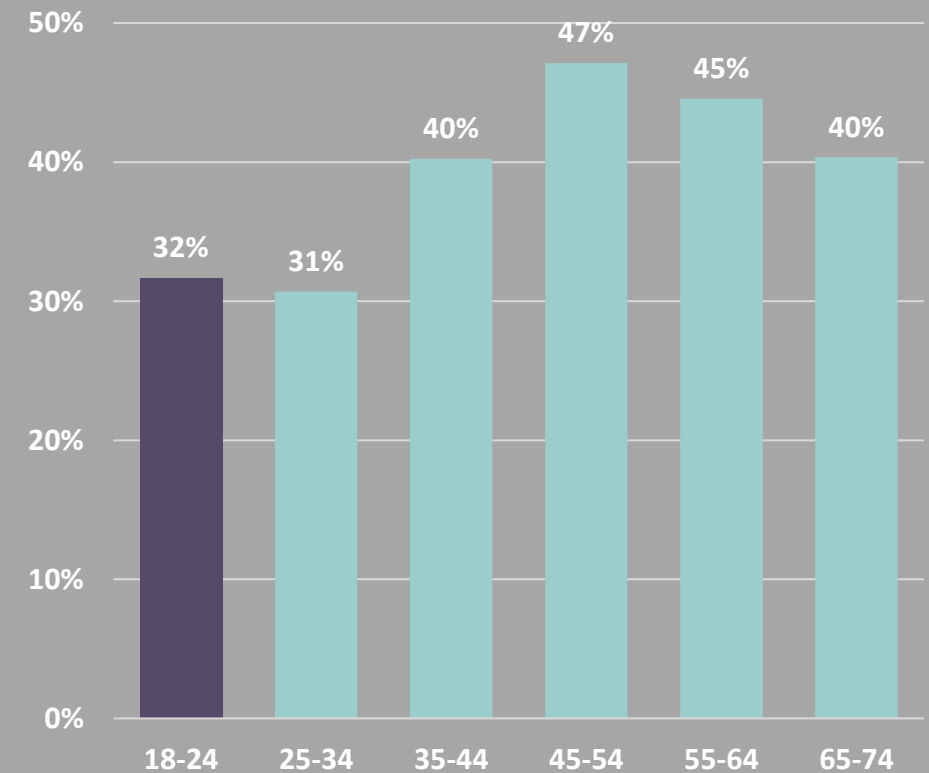
YOUNG GENERATION (18-24 years)

POSITIVE TOWARDS TOURISM

In this survey, the younger generation (18-24) is divided in their view of the impact of tourism. Overall, 30% agree that tourism generates more positive impact than negative, almost as many (27%) disagree. Same for the 25-34 year-olds, where about 1/3 think tourism makes life in the communities of BNP better, while equally as many disagree.

- **What is important?** Generally, the younger segment find the various factors of life less important than the older segments. For instance, they do not value living in a small town as highly. There is one clear exception: 89% find diversity and inclusion very important.
- **What causes concern?** Issues concerning cost of living, housing and sustainability are the three most important factors for the younger segment. In addition, they have concerns over access to health care. They are the least concerned about social inclusion.
- **Satisfaction:** They are less satisfied with life in BNP than the older generations, across all factors. Less than 25% are satisfied with their economic conditions. On the other hand, they are the most tolerant segment when it comes to “living in a place where the world visits”.
- **Indigenous tourism:** Promotion of Indigenous tourism is prioritized a lot higher in this segment.

Tourism has a positive impact on quality of life in BNP



Note: This segment stands for 11% percent of the respondents

THE OLDER GENERATION (65+ years)

POSITIVE TOWARDS TOURISM

In this survey, the older segment of 65+ (10%) is generally more satisfied with various factors of life than the younger residents.

They also think tourism is important – especially as an economic activity. They value life in a small town atmosphere more than the younger generations. In fact, they tend to value all factors of the good life as more important than other age groups.

- **Satisfaction:** The older respondents are most satisfied across all factors, but especially with sustainability and living in a family- friendly community.
- **Concerned:** On the other hand, the older respondents are also more concerned. More than 92% are concerned about traffic issues.
- **Visitation:** They are the most critical when it comes to visitor numbers – mostly same-day visitors or visitors from near-by communities.
- **Sustainable future:** The older age groups are the most united segment in their call for better management of the visitation to the Park in peak periods.

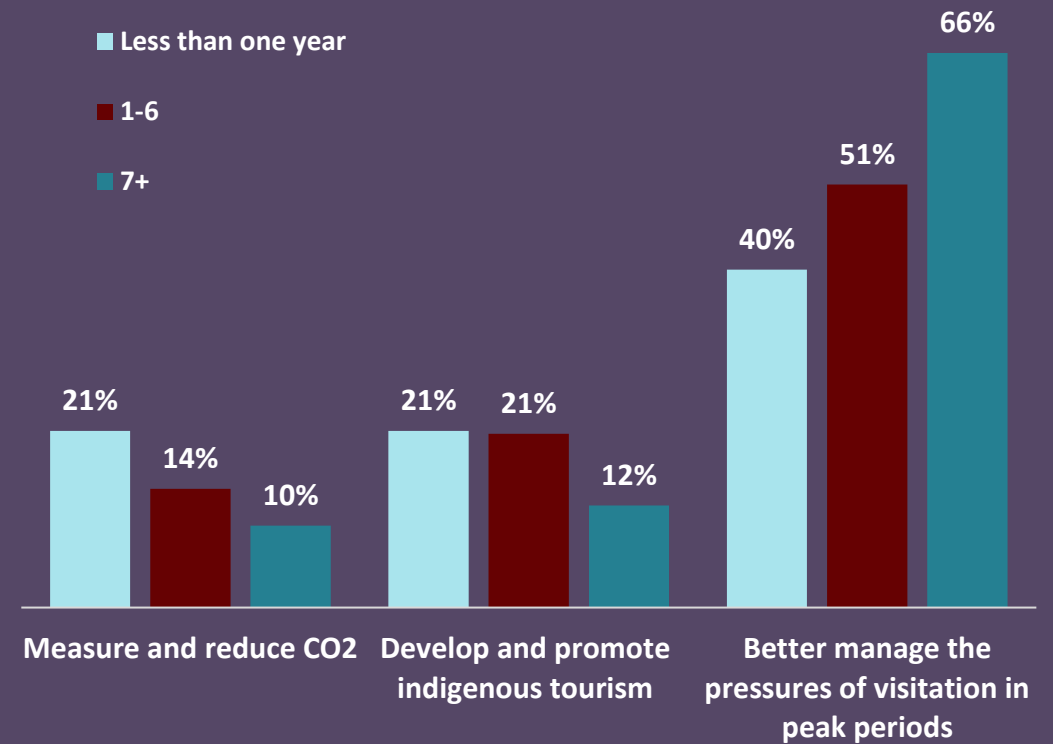
LONG-TIME RESIDENTS (7+ years)

LONG-TIMERS CALL FOR BETTER MANAGEMENT OF VISITATION IN PEAK PERIODS

The long-time residents (7+ years) are well represented in this survey where they make up more than 60% of the respondents.

- **What's important?** The long-time residents find 'small town atmosphere' and 'citizen engagement' important. 'Living in a place where the world visits' is also more important for this group.
- **Concerned:** They are more concerned about visitation pressures and traffic issues than newcomers to BNP.
- **Satisfaction:** They are generally less satisfied than newcomers, except when it comes to economic conditions.
- **Visitation:** When it comes to the number of same-day visitors and regional visitors, most of the long-time residents think there are too many visitors to the Park.
- **Sustainable future:** They are less focused on sustainability and promotion of Indigenous tourism, but are strong advocates for more/better management of visitation to BNP.

Most important priorities for a sustainable future?





NEWCOMERS TO BNP (<3 YEARS)

IT TAKES A WHILE TO SETTLE IN...

Respondents who haven't lived in BNP for long (less than 3 years) generally seem less satisfied and more concerned about economic matters. They tend to assign less importance to factors that make up the good life in BNP for other segments.

- **More Concerned:** Newcomers are generally less concerned, but mostly concerned about the cost of living and affordable housing.
- **Satisfaction:** The segment is split in two groups as residents with less than one year in BNP are the most satisfied, while those with 1-3 years are the least satisfied.
- **Visitation:** Generally a lot more satisfied with visitation, which is illustrated in the table.
- **Sustainable future:** Their focus is more divided but, compared to long-time residents, newcomers are more focused on sustainability and promotion of indigenous tourism.

ARE THERE TOO MANY VISITORS?	Too many	
	<3 years	7+ years
Residence		
Same-day visitors	55%	74%
Regional visitors	29%	51%
Domestic visitors	31%	41%
International visitors	38%	43%
	Just the right number	
Same-day visitors	42%	22%
Regional visitors	59%	40%
Domestic visitors	58%	42%
International visitors	42%	32%

Note: This segment counts 26% percent of the respondents



Visit tourismtogether.com for more findings and results of the Tourism Together process

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