



# RESIDENT SENTIMENT

## 2025 SUMMER PULSE – SOUTHERN ROCKIES

Stone –  
Olafson

NOVEMBER 2025



# BACKGROUND AND APPROACH

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

Objectives include:

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

Approach:

- An online survey tool was developed which was then distributed through Southern Rockies social media channels to encourage residents of the community to provide the perspectives on the local tourism industry.
- A total of n=273 completed surveys were collected during during September 9 - October 7, 2025.
- Insights are evaluated next to the Travel Alberta Summer Pulse Check for comparative measures against provincial averages.

# OBSERVATIONS

- **There is exceptionally high levels of community participation and engagement in the Southern Rockies.**  
Residents report significantly higher participation levels than Albertans overall (64% vs. 39% active participation), with 30% describing themselves as “very active” in seeking out and trying new activities. This reflects a community deeply engaged with local amenities and events.
- **Those in the Southern Rockies have a very high awareness and understanding of tourism’s role.**  
90% of Southern Rockies residents consider themselves informed about the tourism sector and its local impact, compared to 62% provincially. Notably, 42% describe themselves as “very informed”, nearly four times the provincial rate (11%). Additionally, a strong majority can see the direct impact of tourism on their day-to-day life and tourism is recognized as critical to the local and provincial economy by residents. We know from multiple waves of resident sentiment tracking, that participation and knowledge influence sentiment. This is true in the Southern Rockies – high participation and understanding of tourism generate incredibly high sentiment in the region.
- **There are heightened concerns about affordability, housing and having too many visitors in the summer months.**  
58% of residents believe tourism increases the cost of living and makes things less affordable for locals (vs 44% Alberta), and 45% say it makes affordable housing hard to find (vs 27% Alberta). These concerns reflect the realities of living in a high-visitation region where tourism puts pressure on local resources and prices.

# OBSERVATIONS

- **Advocacy is one of the highest in the Province.**

The Net Promoter Score for Southern Rockies residents is 47, vastly exceeding Alberta's score of -4. 60% of residents are promoters who would strongly recommend their community as a place to visit. This demonstrates exceptional pride and willingness to advocate for the region.

- **Though residents are advocates, they do feel strongly about improvements that can be made to enhance the impacts of tourism on locals** (as evidence by verbatims).

Residents are looking for more intentional, community-minded improvements to strengthen the tourism experience. They want clearer, more compelling marketing that reflects what makes their region unique and a more diversified economy, so tourism doesn't stand alone. They want accessible visitor information so guests can navigate and enjoy the area with ease and expanded accommodation options that match growing demand.

- **Personal connection to the sector.**

Though perceptions, knowledge levels, participation and advocacy are greatly elevated in the Southern Rockies, a portion of is likely attributed to a much larger percentage of residents directly connected to the sector. 21% of residents currently work in the travel/tourism industry, 16% have worked in it previously, and 20% have friends or family who do, meaning 57% have some personal connection to the sector. This is significantly higher than the 27% provincial average and helps explain the high awareness and engagement levels.

# CONSIDERATIONS

- **Sentiment is a strength for this region.**

This is a region clearly supportive of tourism and its potential for their area. While this is a region that has not had the relative level of development as other mountain destinations, residents clearly see the benefits and positive impacts for their communities. Strive to protect this sentiment.

- **Affordability is a challenge.**

When it comes to identifying challenges, residents are more likely than those in other areas to focus on affordability issues as key concerns. This may signal an opportunity to elevate messages of positive economic impact for the region. Helping residents realize the economic benefit will be an important focus moving forward.

- **Interest in development is strong.**

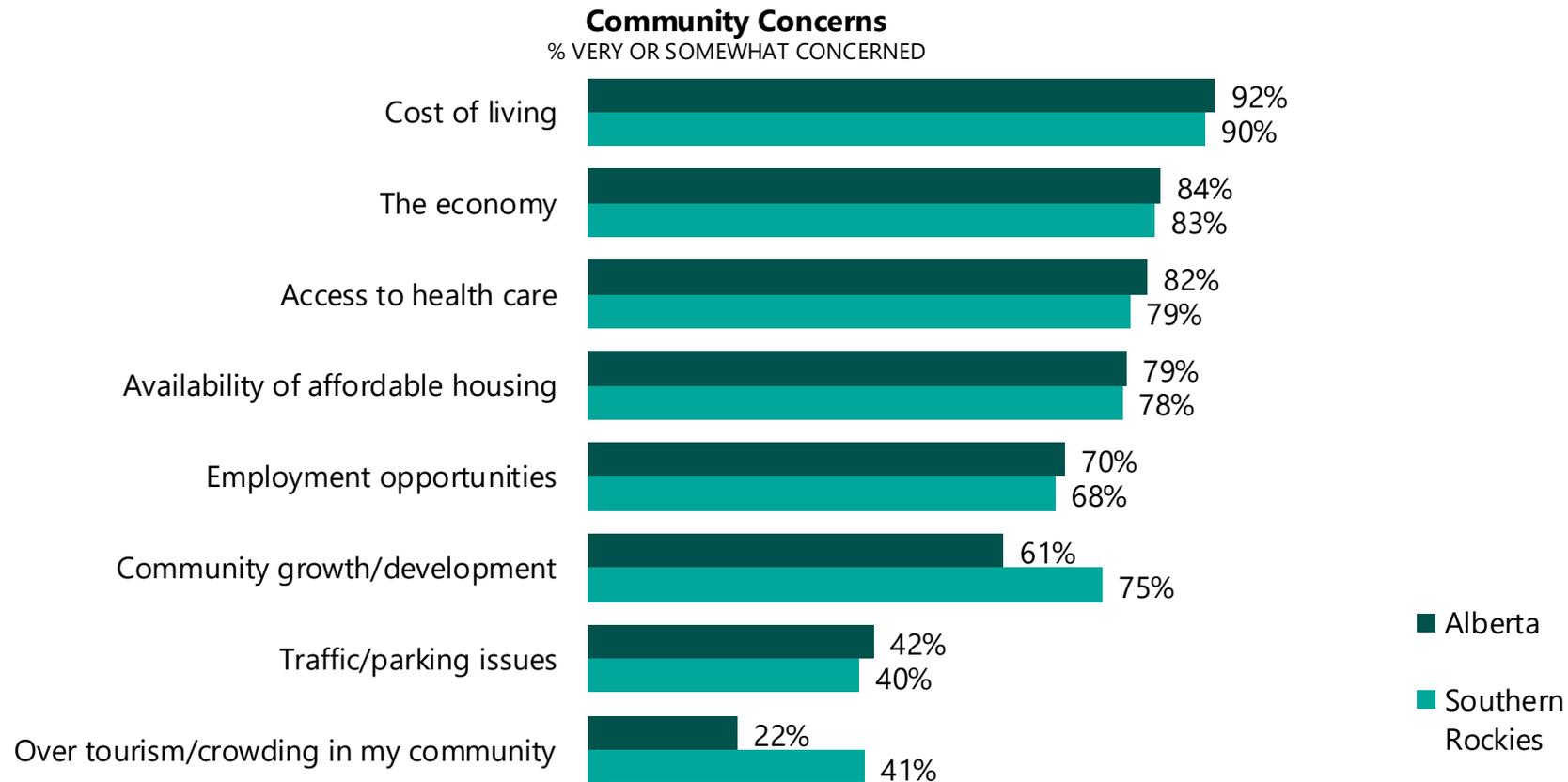
Resident input reflects a region that is in the early days of tourism development and growth. As the region becomes more popular with visitors there is a clear need to further develop tourism infrastructure within the region. This also applies to diversification of tourism amenities in the region. All that said, it will be important to show how sensitive/unique natural areas are being protected.

A landscape photograph of a grassy field at sunset. The sun is low on the horizon, creating a bright glow and lens flare. The sky is a clear, deep blue. In the foreground, there are tall, golden-brown grasses and several dark, rounded objects, possibly rocks or pieces of equipment. The background shows rolling hills and a distant horizon line. The text "DETAILED RESULTS" is overlaid in the center of the image in a bold, white, sans-serif font.

# DETAILED RESULTS

# THE ALBERTA ISSUE AGENDA

Residents of the Southern Rockies share many of the same key concerns as Albertans, especially affordability, the economy, and health-care access. However, they place stronger emphasis on community growth and feel the impacts of tourism-related crowding more intensely, reflecting the realities of a high-visitation region.

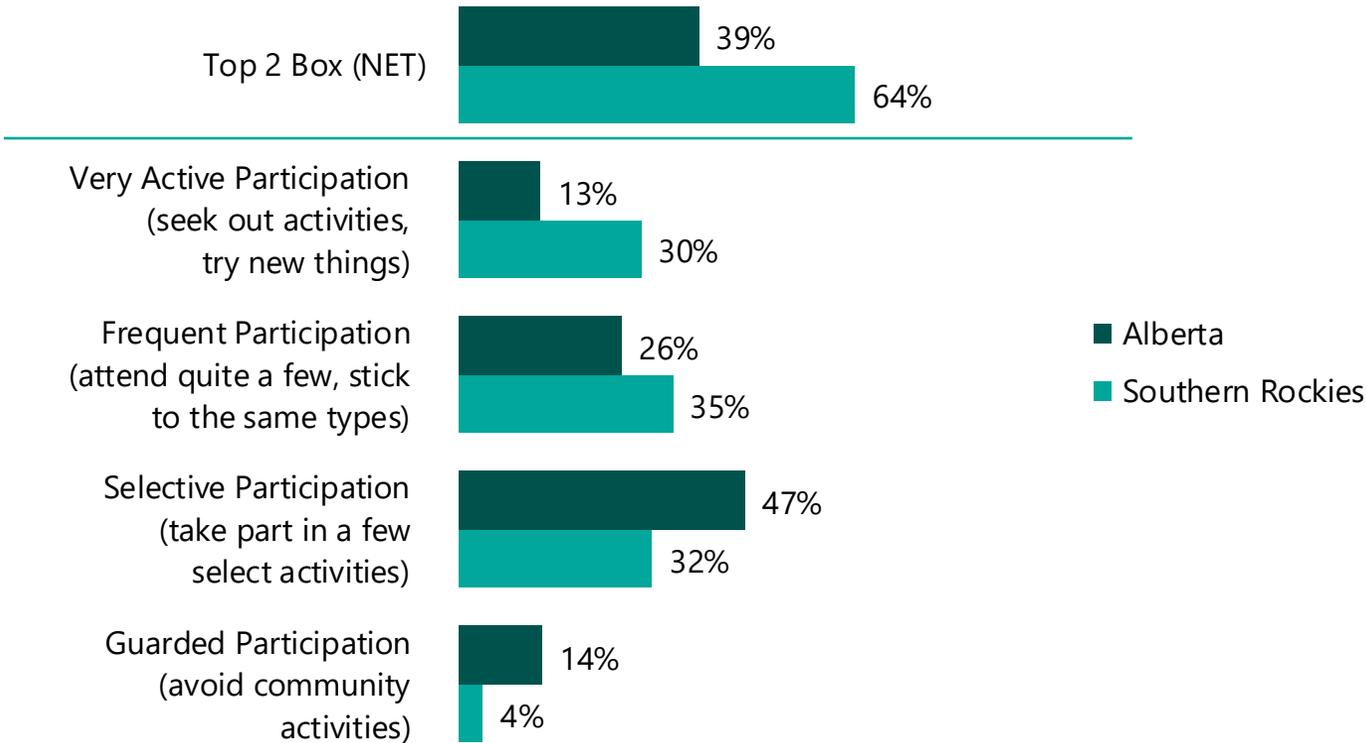




# COMMUNITY PARTICIPATION

**Southern Rockies residents report significantly higher participation levels than Albertans overall, reflecting strong community engagement.**

Community Participation



Q6. Of the following statements, which one best describes your participation in activities, attractions, and events in your community? Base: All respondents (n=273)

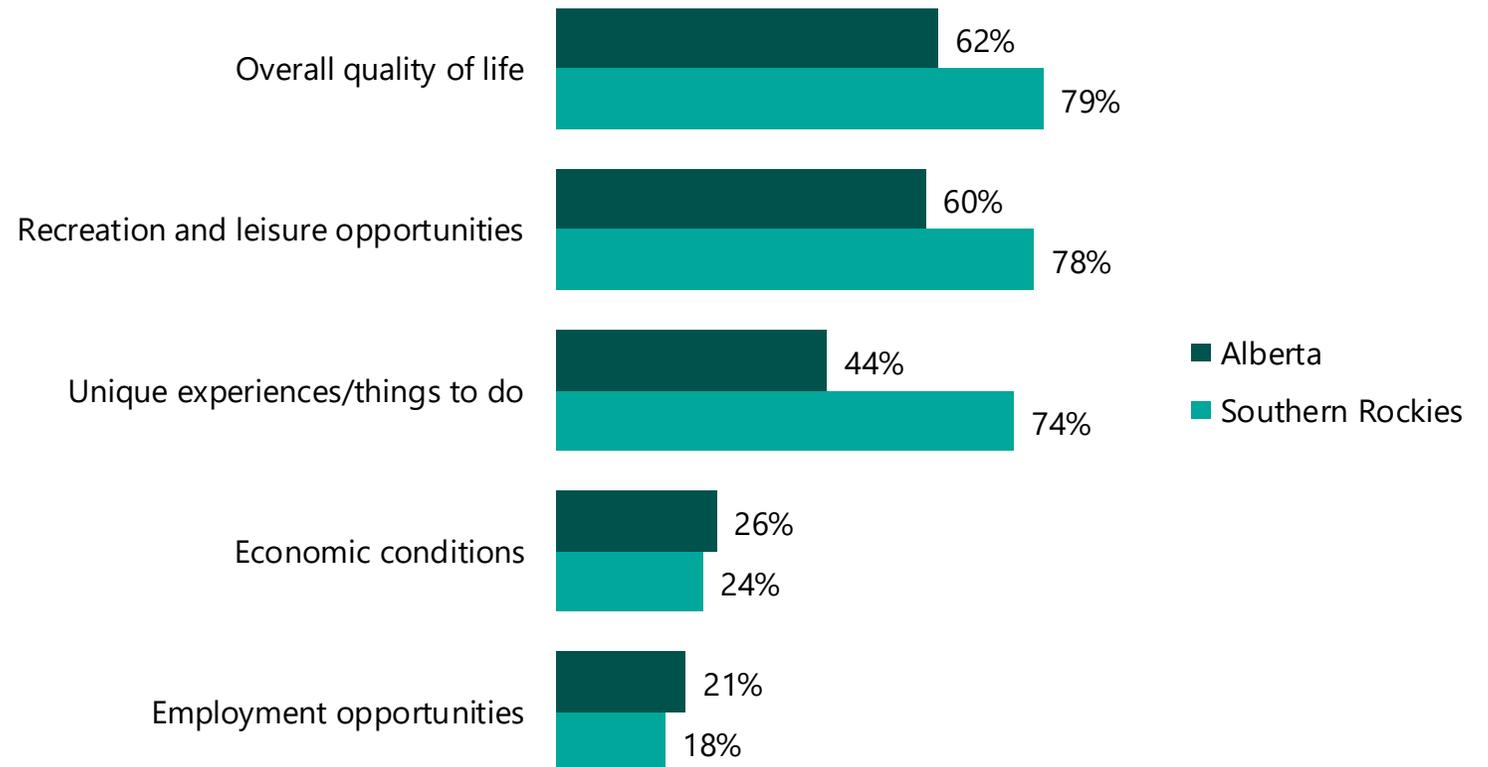


# COMMUNITY RATINGS

Perceptions of community strengths, such as quality of life, recreation and leisure options, and unique activities, are notably higher among Southern Rockies residents than among Albertans overall. In contrast, views on economic conditions and employment opportunities are more muted and align closely with provincial averages

## Community Concerns

% RATED 5 EXCELLENT OR 4



Q10. How would you rate the following in your community? For each element, please use a scale of 1 to 5 where 1 means that element is very poor and 5 means that element is excellent. Base: All respondents (n=273)

# ATTITUDES TOWARD COMMUNITY EVENTS AND ACTIVITIES

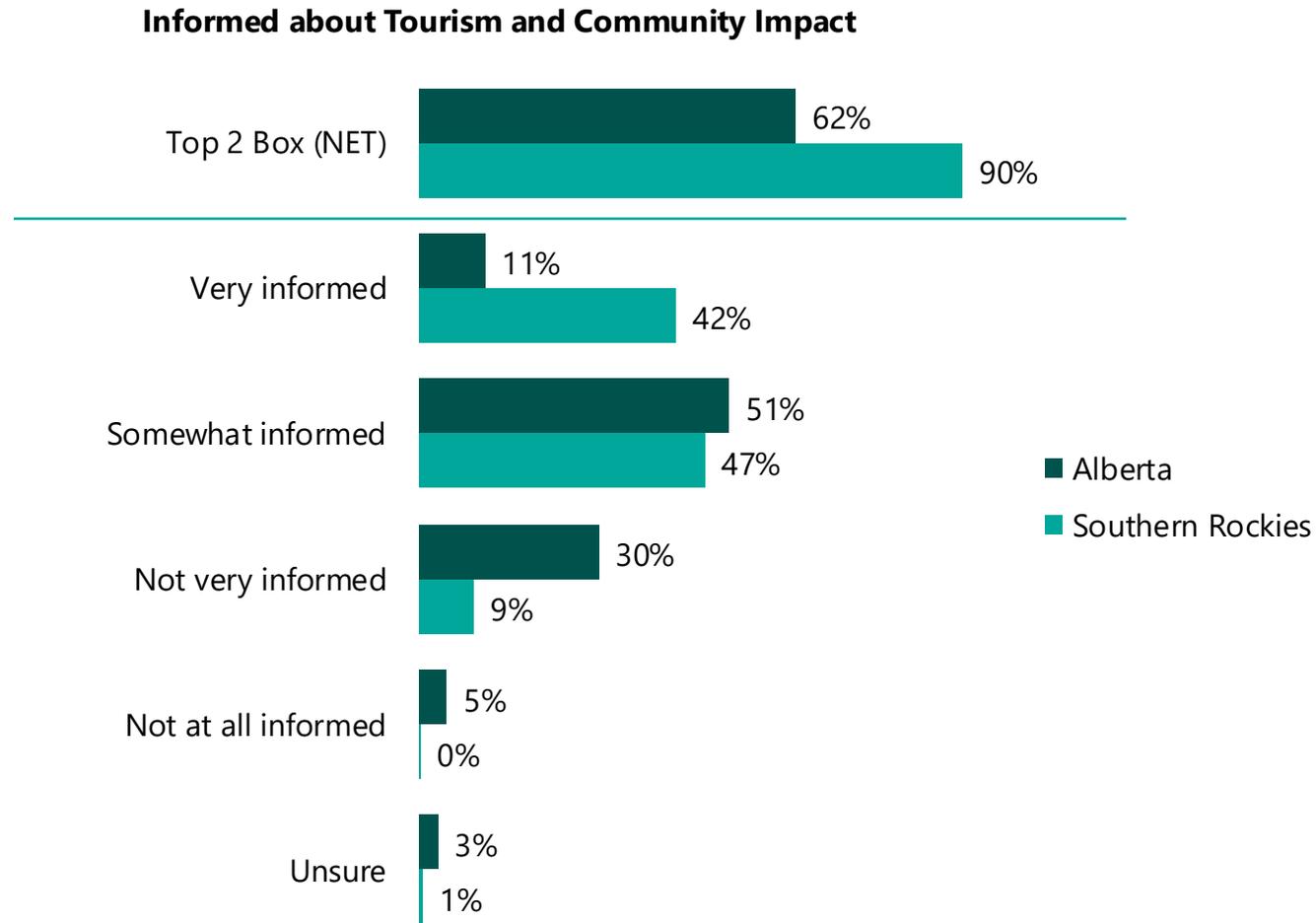
Community attitudes are strong in the Southern Rockies, with most residents feeling well-connected, aware of key events, and appreciative of how local activities enhance quality of life.

**Attitudes Toward Community Events and Activities**  
% STRONGLY AGREE OR AGREE



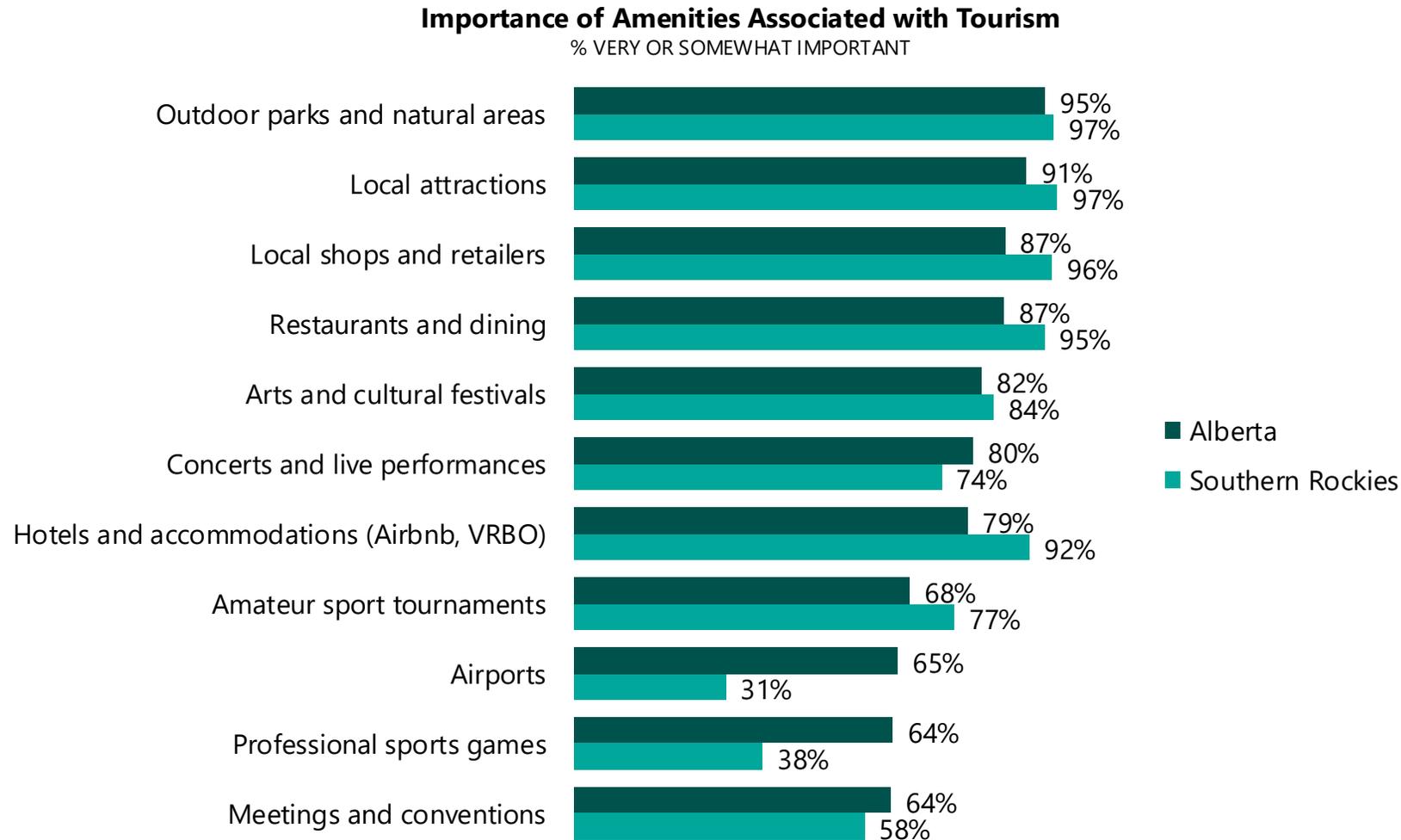
# INFORMED ABOUT TOURISM SECTOR AND IMPACT ON COMMUNITY

Residents of the Southern Rockies demonstrate a strong understanding of the tourism sector.



# AMENITIES ASSOCIATED WITH TOURISM

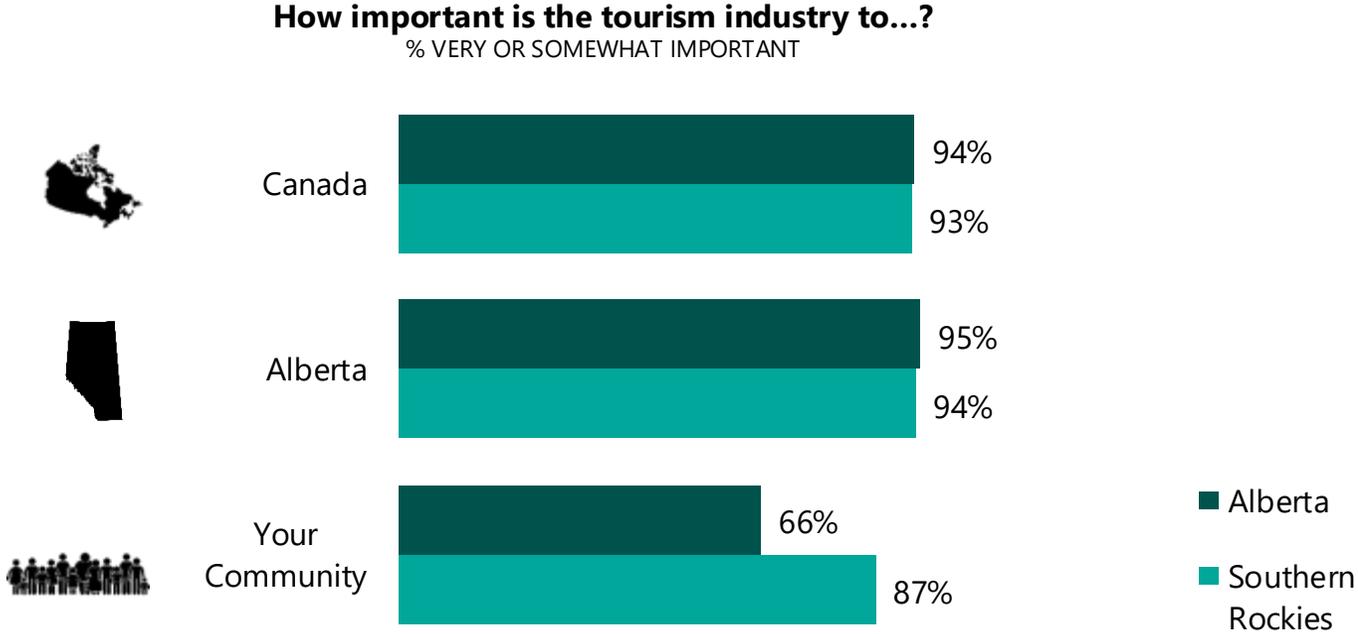
Residents place strong importance on amenities such as outdoor parks, local attractions, dining, and retail. In contrast, amenities like airports are viewed as less important to driving visitation to their community.





# IMPORTANCE OF TOURISM

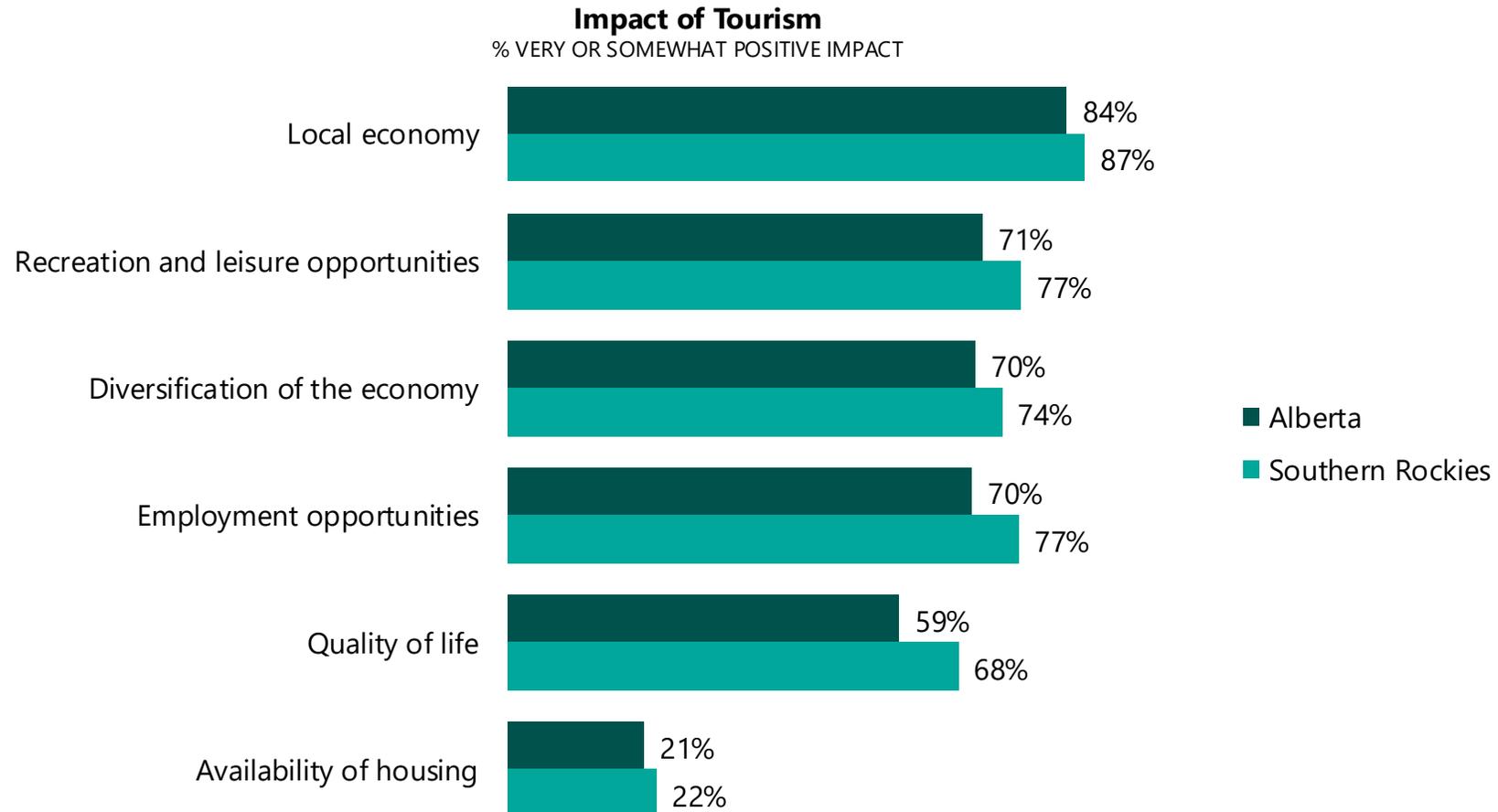
Southern Rockies residents clearly recognize the importance of the tourism sector, not only to their local community, but also to the province and the country. Their high community engagement, strong awareness of tourism elements, and more positive perceptions contribute to a deeper understanding of the sector's value.



Q13. How important is the tourism industry to ...Base: All respondents (n= 113)

# IMPACT OF TOURISM

Residents of the Southern Rockies have similar perceptions as many Albertans when it comes to positive impacts on tourism. The recognition of tourism supporting a positive quality of life is much higher in the Southern Rockies.

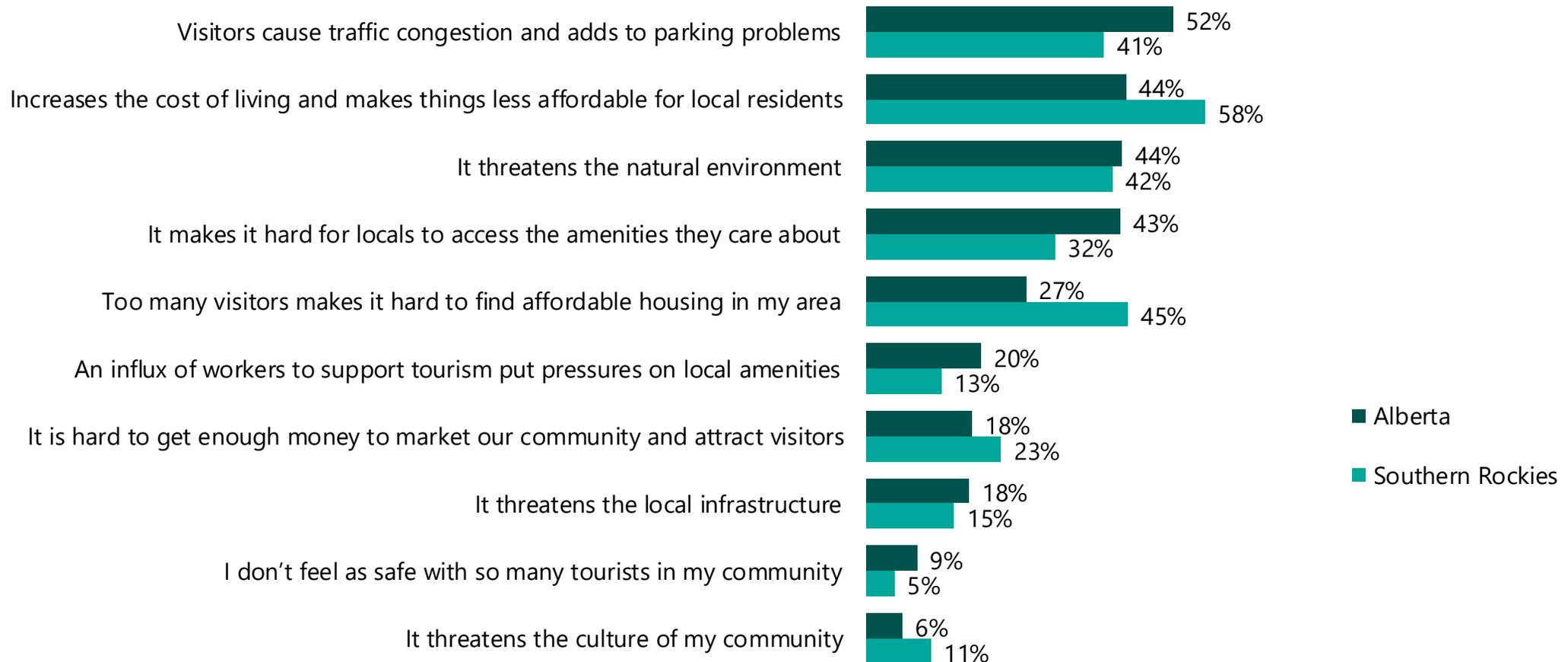


# CHALLENGES OF TOURISM

Given their closer connection to the sector, it's not surprising that residents report heightened awareness of key challenges, particularly the ways tourism can raise the cost of living and reduce the availability of affordable housing.

## Challenges of Tourism

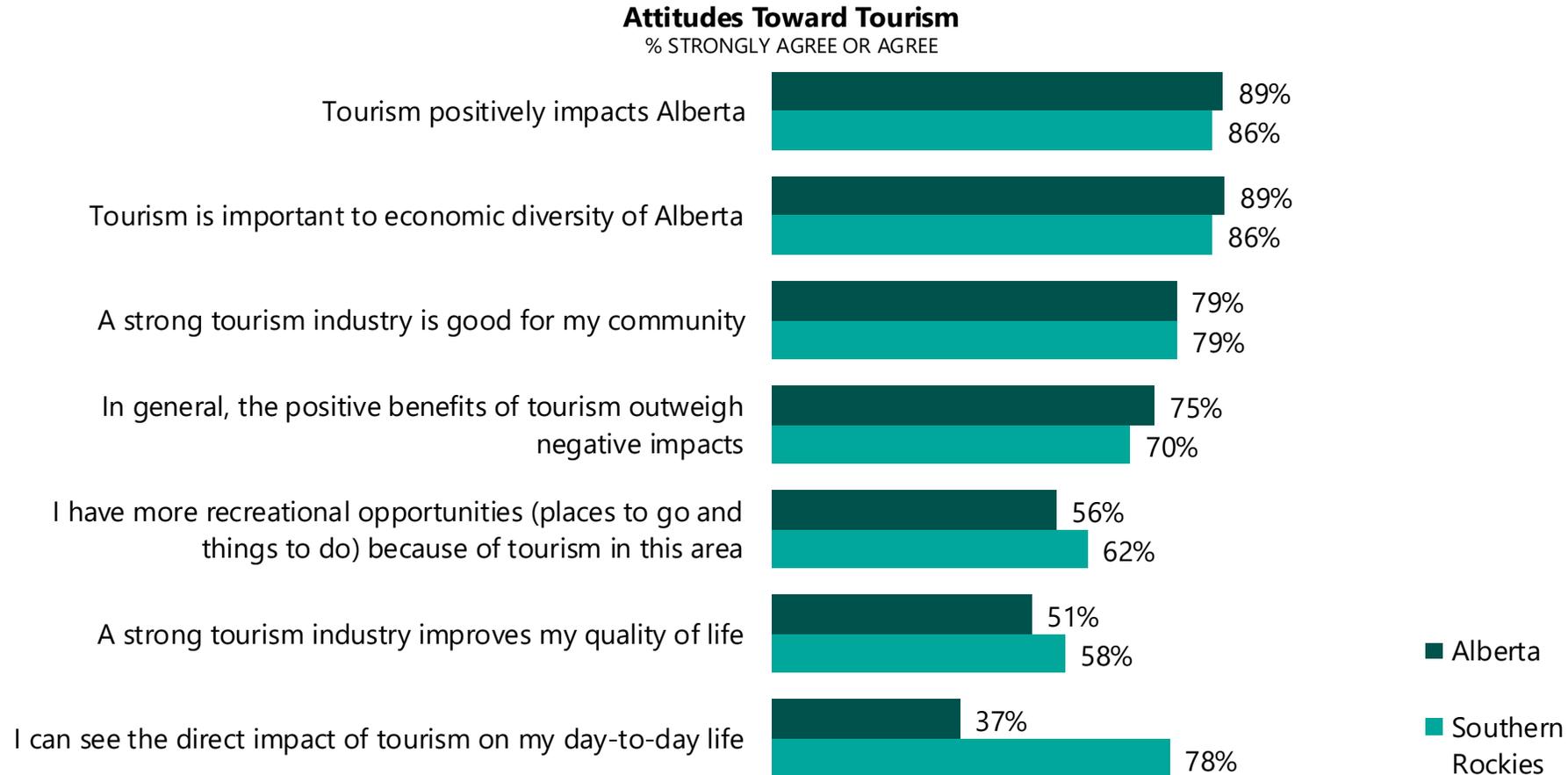
% SELECTED – UP TO THREE



Q16. Some people say there are challenges associated with tourism. Please review the following and select what you see as being the top 3 challenges in bringing visitors to your community? Rank your top 3 challenges by entering a 1 beside what you see as most challenging, a 2 beside what you see as second most challenging, and a 3 beside what you see as third most challenging  
Base: All respondents (n=273)

# ATTITUDES TOWARD TOURISM

Local residents can very directly see the impact of tourism on their day-to-day life. Support for the sector overall is very strong.



Q15. To what extent do you agree or disagree with each of the following statements about tourism in your community?  
Base: All respondents (n=273)

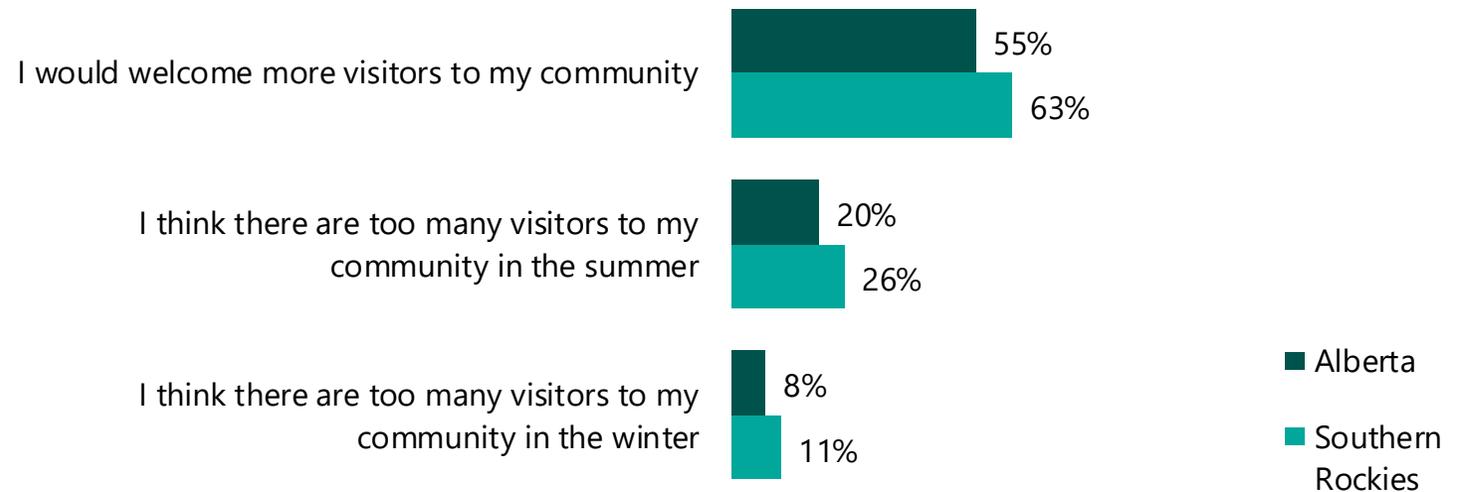


# WELCOMING VISITORS

Encouragingly, those in the Southern Rockies would welcome more visitors.  
About a quarter feel as though there are too many visitors in the summer.

## Attitudes Toward Visitors

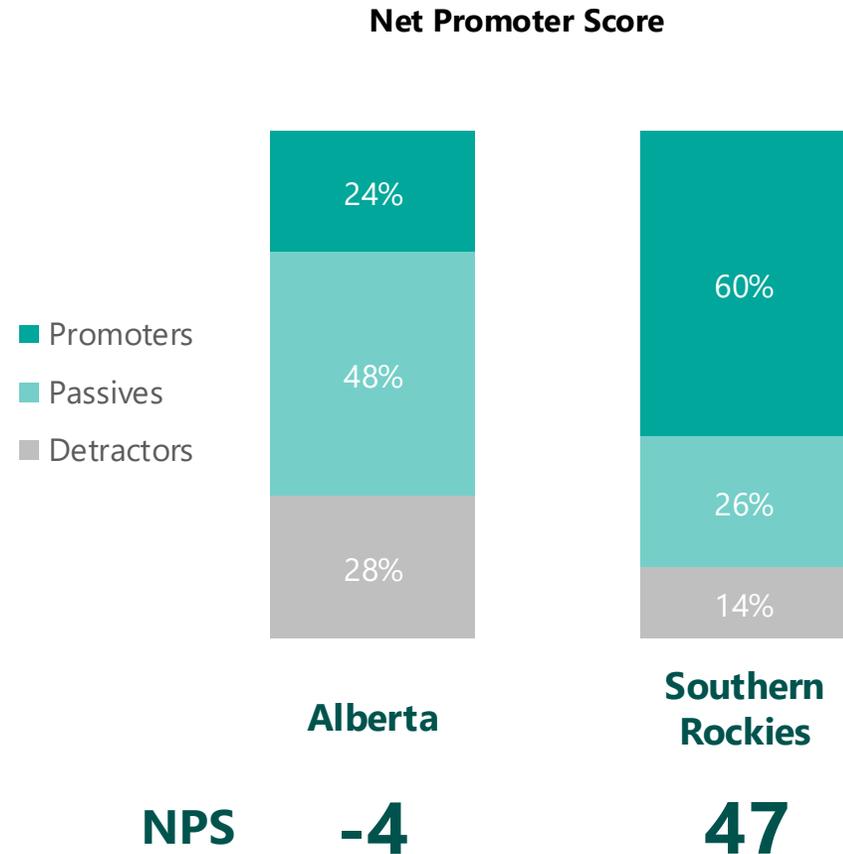
% STRONGLY AGREE OR AGREE





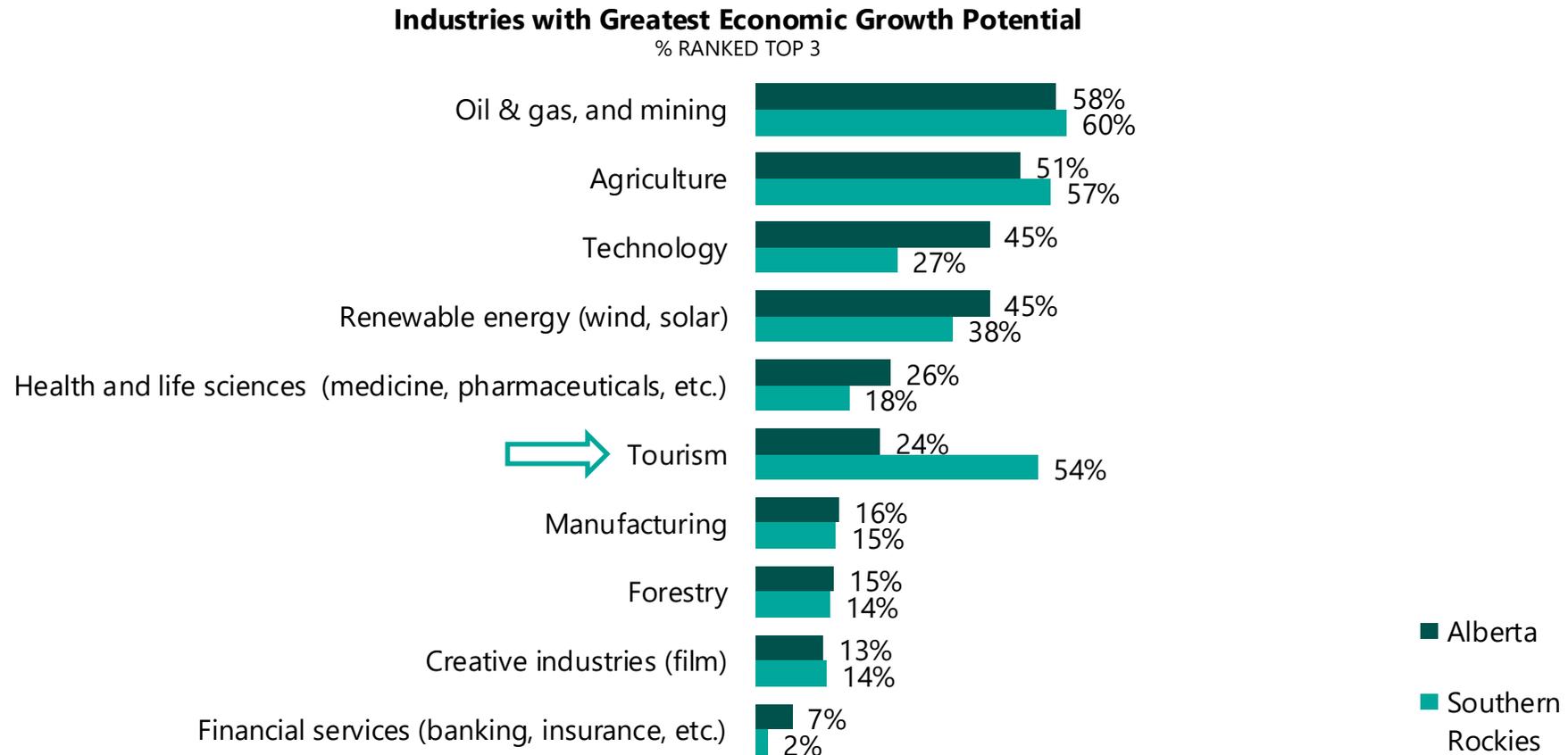
# NET PROMOTOR SCORE

**Southern Rockies NPS vastly exceeds scores for Alberta overall. There is a very high proportion of promoters (8,9,10/10 recommend) in the Southern Rockies.**



# INDUSTRIES WITH THE GREATEST ECONOMIC GROWTH POTENTIAL

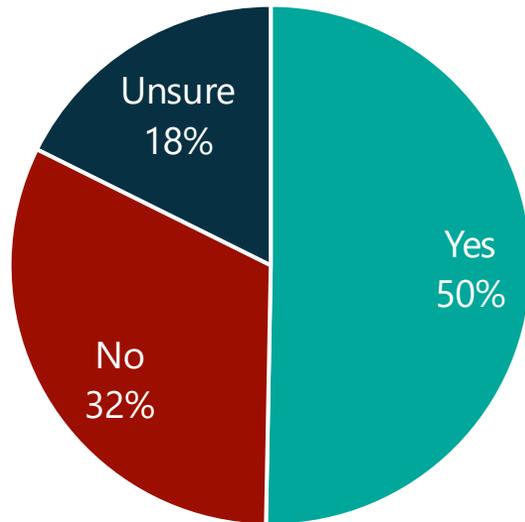
Though Oil and gas and agriculture, are viewed as the industries with the strongest economic growth potential, Tourism also stands out as a significant opportunity with over half identifying it as a key contributor to future economic development.



# AWARENESS OF SOUTHERN ROCKIES

Half of residents feel they are aware of the South Canadian Rockies Tourism Association's role on tourism. Awareness is strongest among those 35-54 years old.

Awareness of the South Canadian Rockies Tourism Association Role on Tourism



	18 to 34	35 to 54	55+
Yes	40%	61% ↑	43%
No	48%	32%	28%
Unsure	13%	7% ↓	29% ↑

# SUGGESTED IMPROVEMENTS (1/2)

Residents were asked to provide suggestions for improvements that could be made for tourism to be more beneficial for them in the Southern Rockies. Below are some key themes from the verbatim comments.

## 1. Infrastructure & Amenities Development

- Roads, traffic, parking and transportation (upgrade highways, traffic control, more parking, shuttle options)
- Accommodations infrastructure (more hotels, affordable accommodation for workers, regulate short-term rentals)
- Community amenities (restaurants, retail, services). More options, improved hours and expanded retail and personal services on weekends

## 2. Housing and Cost of Living Concerns

- Increase affordable housing, reduce non-residents buying properties, protect long-term rental stock from tourism uses

## 3. Environmental Protection & Conservation

- Protect natural areas (limit overuse, employ conservation strategies and stronger enforcement of rules)
- Manage visitor impact (caps in parks, control off-road vehicle use)
- Better education on backcountry etiquette, improve signage, harsher penalties

## 4. Tourism Product Development & Diversification

- More hiking, biking and trails
- More music festivals, markets and family friendly activities
- Seasonal diversification (i.e. summer programming at ski hills)

*"Improvement on highways to handle the increased number of vehicles... More rest stops... Protect the areas under protection so that the animals and areas are safe from overuse."*

*"We need amenities (restaurants, retail) and housing (hotels) to support the visitors our tourism would bring."*

*"A bigger, vibrant downtown area... Come and play here, then shop here and dine here."*

*"Education about how we respect our natural environments and severe fines for not adhering to rules."*

*"We are losing cattle to tourists driving too fast... so much more garbage due to increased traffic and lack of respect."*

# SUGGESTED IMPROVEMENTS (2/2)

Residents were asked to provide suggestions for improvements that could be made for tourism to be more beneficial for them in the Southern Rockies. Below are some key themes from the verbatim comments.

## 5. Economic Development & Local Benefits

- Diversify the economy beyond resource extraction
- More support for local business
- Year-round job opportunities
- Provincial funding for infrastructure and community services

## 6. Marketing Awareness & Promotion

- Increase promotion of what's in the area (i.e. awareness of trails, attractions, events). Stronger marketing in Canada and the USA. More centralized places for tourism information
- Set realistic expectations for visitors (communicate lack of cell service, local norms, responsible tourism). Let them know about busy periods.

## 7. More Benefits to Residents

- Prioritize residents in housing, parking, access
- Protect local culture and way of life
- Provide more resident perks (passes, discounts)
- Desire for municipal planning that acknowledges tourism impacts

*"Reduce red tape and approval for new developments... Fair limits on short-term rentals."*

*"Consider the impact on the locals... It is hard to support tourism when it is not supporting our small communities."*

*"More direct communication with local businesses in advance of anticipated busy periods."*

*"Help to diversify the economy... allow us to rely less on potentially damaging projects such as coal mines."*

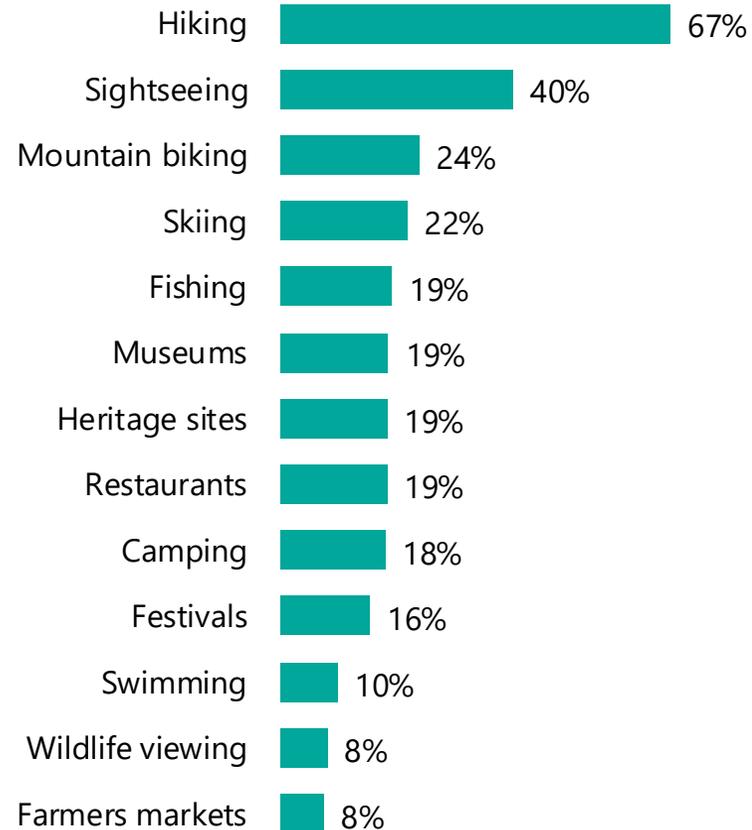
*"Trails are a big attraction... They need more recognition and improvement in signage, promotions, and parking."*

# ACTIVITIES WITH VISITORS

When residents of the Southern Rockies host visitors, they typically take them hiking and sightseeing.

## Activities and Attractions with Visitors

MENTIONS OF 8% OR MORE



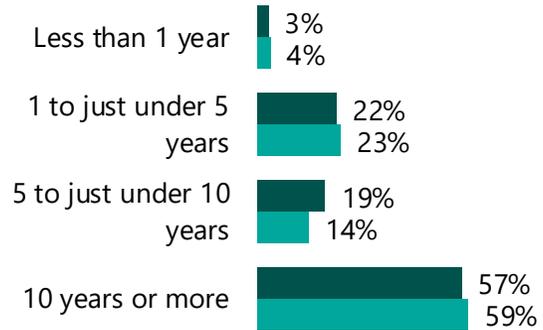
A wide-angle landscape photograph capturing a sunset over a vast, grassy field. In the center, a person and a child stand with their backs to the camera, looking towards the sun. The sun is low on the horizon, creating a bright glow and lens flare. To the right, several wind turbines are visible against the sky. The sky is filled with wispy clouds, and a single white contrail from an airplane is visible in the upper right. The overall mood is serene and hopeful.

# DEMOGRAPHICS

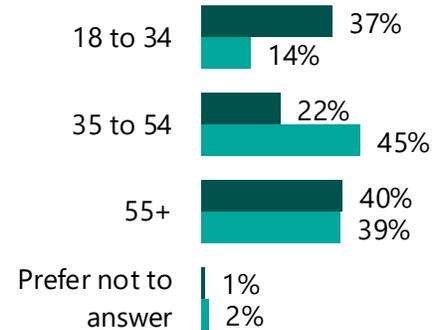
# RESPONDENT PROFILE

■ Alberta  
■ Southern Rockies

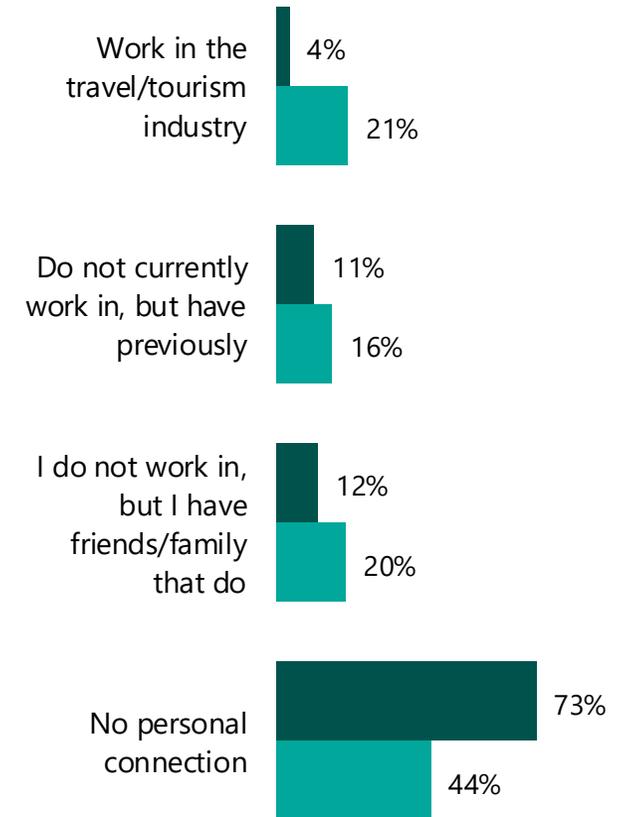
## Time Lived in Community



## Age



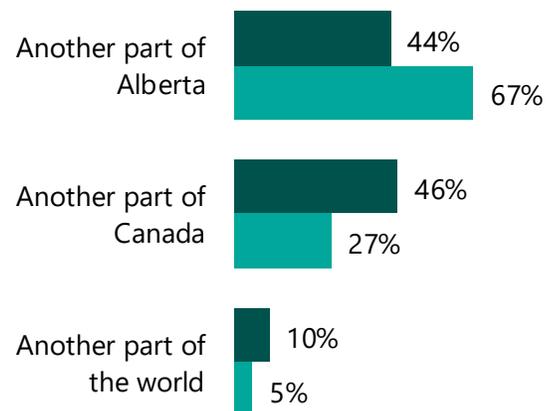
## Connection with Tourism



## Originally From



## Moved From



# THANK YOU

FOR ANY QUESTIONS ABOUT THIS RESEARCH  
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