

Economic Impact of Tourism in Central Alberta

Final Report

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Key findings

- Using a novel method for measuring the local economic impact of tourism in Central Alberta, we estimate tourism spending in Central Alberta was \$1.0 billion in 2024.
- In 2024, tourists to Central Alberta made 4.2 million same-day visits and 2.7 million overnight visits staying a total of 5.7 million nights.
- This tourism activity in Central Alberta generated \$900 million in national GDP, 40 per cent of which was realized outside of Central Alberta, in other regions of Alberta and across Canada
- The local tourism activity contributed \$337 million in tax revenue across all levels of government in 2024 and supported over 7,500 jobs nationally, of which 5,200 were local jobs in Central Alberta.
- The total GDP impact associated with tourism activity in each of the eight individual Central Alberta regions studied was as follows:
 - Blackfalds tourism generated \$23 million in GDP
 - Clearwater County and Caroline tourism generated \$54 million
 - City of Red Deer tourism generated \$359 million
 - Innisfail tourism generated \$30 million
 - Lacombe County tourism generated \$44 million
 - Red Deer County tourism generated \$99 million
 - Rocky Mountain House tourism generated \$42 million
 - Sylvan Lake tourism generated \$59 million
- Our data highlights the importance of overnight visitors as a significant source of spending on food, accommodation, and transportation, generating almost four times more revenue per trip than same-day travelers.
- Our approach leverages novel datasets of mobile phone geolocation and point-of-sale transaction records. These data sources offer a more precise line of sight into local tourism activity than is possible with traditional survey methods.
- Non-tourism businesses and government agencies play a critical role in supporting tourism, especially in smaller communities where traditional tourism industries are less prevalent. Their contributions—such as maintaining parks, trails, and recreation facilities—help to attract visitors.

A Novel Approach to Analyzing Local Tourism Activity



Tourism accounts for roughly two per cent of Canada's overall economic activity, yet researchers have lacked reliable, local-level data to assess its regional impact. This analysis leverages newly accessible, high-resolution datasets that provide unique insights into travel behaviour and spending patterns across Central Alberta. We combine two key data sources:

1. **Tourist movement data:** Derived from mobile phone geolocation records, this data captures detailed visitor flows, trip types (overnight vs. same day), and origins (local, domestic, and international). Provided by *Environics Analytics*.
2. **Tourist spending data:** Based on point-of-sale transaction records, this data tracks credit and debit card purchases across Central Alberta, giving precise information on visitor spending, such as location, value, time, type of merchandise, and purchaser origin. Provided by *Moneris*.

These datasets provide a powerful, comprehensive, and real-time picture of tourism activity at the local level. Traditional data sources, such as Statistics Canada's National Travel Survey (NTS) and Visitor Travel Survey (VTS), offer reliable national and provincial indicators but lack the granularity required for sub-provincial analysis. To fill this gap, other studies have relied on small-scale "intercept surveys," which face significant quality challenges. These depend on tourists agreeing to on-the-spot interviews and accurately recalling spending behaviour, conditions that limit reliability. In contrast, our approach captures millions of real-world observations that reveal how and where people travel and spend. While representativeness challenges remain, particularly in expenditure data, we employ rigorous alignment techniques to ensure consistency with Statistics Canada's provincial benchmarks.¹ The result is a richer and more accurate foundation for understanding regional tourism dynamics.

By integrating these high-quality, real-world data into our proprietary Economic Impact Assessment (EIA) model, we translate observed travel and spending activity into meaningful economic indicators. The EIA model quantifies tourism's contributions to GDP, employment, labour income, and tax revenues at the local level, capturing both direct and spillover effects across industries.

¹ Further methodological details are provided in the Appendix.

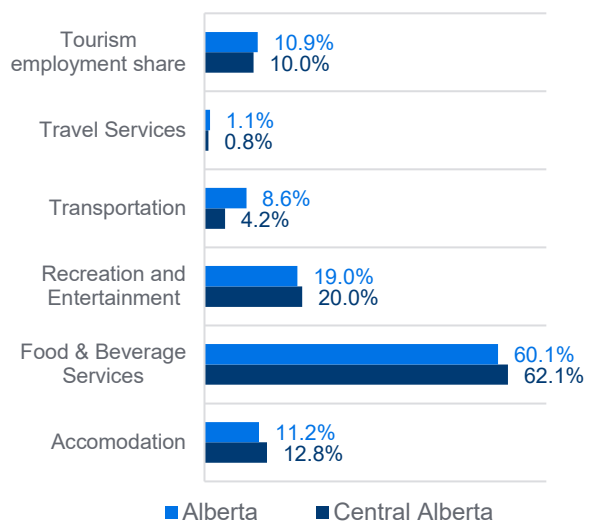
Tourism as an Economic Driver in Central Alberta

Tourism plays an important role in Central Alberta's economy

Central Alberta spans the busy Calgary-Edmonton corridor and encompasses numerous small towns and rural communities.² The region has a population of just over 250,000, around 5 per cent of Alberta's total population. The region includes prairie plateaus, aspen parkland, ranch lands and forested areas that lead up to the Rocky Mountains. Its economy is mainly driven by agriculture and energy industries. The tourism sector also plays an important role locally, accounting for roughly 10 per cent of regional employment.³ The sector is concentrated in food and beverage services, as well as recreation and entertainment businesses. (See Chart 1.)

Chart 1

Food and beverage businesses dominate Central Alberta's tourism sector (per cent of employment among privately operated businesses)



Sources: Signal49 Research; Statistics Canada's Business Register.

It is important to note that the tourism sector depends not only on traditional tourism businesses offering the amenities, but also on the wider local economy and public services that enhance visitor experiences. While businesses in core tourism industries provide part of the infrastructure and amenities that support travel, non-tourism businesses and governments also play a vital role. They contribute through the operation and maintenance of recreation facilities, parks, hiking trails, and retail establishments that serve both residents and visitors,

² For the purposes of this study, Central Alberta is defined as the 08 and 09 Census Divisions, which include the eight regions comprising the Central Alberta Tourism Alliance (CATA) as well as several other municipalities. Specifically, this includes Red Deer County, Innisfail, the City of Red Deer, Sylvan Lake, Lacombe County, Blackfalds, Clearwater County and Caroline, and Rocky Mountain House.

³ See the text box below as well as Appendix D for a discussion and the definitions of "tourism sector" and "tourism activity".



even if they fall outside the formally defined tourism sector. As such, the breakdown presented in Chart 1 above may not perfectly represent the whole of the tourism offering and infrastructure in Central Alberta.

In fact, data from Statistics Canada's Business Register shows that smaller communities often have relatively fewer businesses and jobs in traditional tourism industries, particularly in recreation and entertainment. In these areas, the contributions of non-tourism businesses and public services are especially important. Their efforts in providing and maintaining essential amenities can be the determining factor in attracting and retaining visitors to these regions.

The tourism sector and tourism activity are related but distinct concepts

Tourism is unique because *demand* and *supply* materialize differently. **Tourism activity**, or tourism *demand*, occurs when outside visitors travel to experience local amenities. In contrast, the **tourism sector**, which *supplies* tourism goods and services, comprises the businesses that provide these amenities, such as accommodations, food and beverage establishments, and certain transportation providers.

As such, not all revenues generated by the tourism sector counts as tourism activity. Sales to local residents support the sector but do not reflect tourism spending. Yet, those sales are counted by the tourism sector and are vital to its perennity. Conversely, non-tourism businesses such as grocery stores, clothing stores, and gas stations, are captured in tourism activity as they offer essential goods and services to visitors.

Central Alberta tourism added \$900 million to GDP

Tourists spent \$1.03 billion dollars in Central Alberta in 2024,⁴ generating \$899.7 million in GDP for Canada. For every dollar spent by tourists, approximately 87 cents of value-added benefits were generated for Canadian businesses, governments, and residents. (See Table 1.) This implies a GDP multiplier of 0.87 from tourism—a substantial figure since any positive GDP impact represents a net gain to the economy.⁵

An estimated \$540 million (60 per cent) of the total GDP impact was generated within Central Alberta. A further \$179 million (20 per cent) of GDP impact was generated across the rest of

⁴ Note: This figure differs from Travel Alberta's estimate of tourism revenue in Central Alberta due to both geographic and methodological differences. Travel Alberta's estimate of \$1.6 billion is based on tourism intercept surveys and includes additional expenditures made outside the destinations visited—such as spending at the trip's origin and on commercial air transportation. In contrast, our estimate is based on visit volumes derived from mobile tracking data and includes only expenditures that physically occur within the geographical region defined in this study.

⁵ GDP is, by definition, the net value added to the economy – akin to profit rather than revenue. It is a key economic indicator as it translates to labour income and business profits. For this reason, any GDP multiplier greater than 0 is a desirable result. GDP multipliers less than 1 are common and being above or below 1 does not hold any special significance.



the province. In total, the GDP impact of Central Alberta tourism was roughly equal to 0.25 per cent of Alberta’s total GDP or 6.4 per cent of Alberta’s tourism related GDP.⁶

Tourism activity in the region also generated \$337 million in tax revenues across all levels of government, with the majority (62 per cent) being paid to the federal government. A further 26 per cent went to the Alberta provincial government while 3 per cent (\$10.7 million) went to local area municipalities within the region. (See Table 2.) This is because much of these tax revenues comes from income and sales taxes, which are not collected by municipalities.

Table 1

Most of tourism’s economic impact is generated locally in Central Alberta
(Total economic impact, 2024 Canadian dollars, thousands)

	Central Alberta	Alberta, total	Canada, total
GDP (\$ thousands)	\$539,561	\$718,936	\$899,679
Income (\$ thousands)	\$309,589	\$406,895	\$511,631
Employment (jobs)	5,228	6,206	7,516

Source: Signal49 Research.

Table 2

Tourism in Central Alberta generated \$337 million in tax revenues in 2024
(2024 Canadian dollars, thousands)

	Tax revenue
Total tax revenues	\$337,031
Federal taxes	\$207,724
Provincial taxes – Alberta	\$86,428
Provincial taxes – Other provinces	\$21,712
Municipal taxes – local area	\$10,652
Municipal taxes – rest of Alberta	\$5,309
Municipal taxes – Other provinces	\$5,207

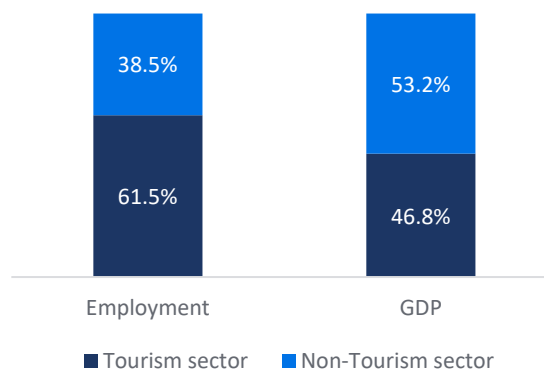
Source: Signal49 Research.

⁶ Travel Alberta, “Economic Impact,” Tourism Indicators, accessed November 6, 2025, <https://industry.travelalberta.com/research/tourism-indicators/economic-impact>



Tourism activity supported 5,228 jobs in Central Alberta (4.9 per cent of regional employment) and 2,288 jobs elsewhere in Canada. (See Table 1.) Just under 62 per cent of the jobs supported by tourism activity in Central Alberta were in the tourism sector, while just over 38 per cent were outside the tourism sector. GDP generated by tourism activity was split almost equally between tourism and non-tourism sectors. (See Chart 2.)

Chart 2
GDP and jobs impacts diffuse slightly differently across the economy
(jobs supported, GDP generated)



Source: Signal49 Research.

Tourists to Central Alberta were mainly domestic-based travelers

In 2024, tourists to Central Alberta made 4.2 million same-day visits, and 2.7 million overnight visits, which amounted to a total of 5.7 million nights.

The vast majority of all visits, visitors, and nights stayed were made by Canadians. (See Table 3.) Albertans themselves made over 90 per cent of the same-day visits, 85 per cent of the overnight visits and accounted for 77 per cent of the nights stayed. Visitors from the United States (U.S.), mostly from California, Texas, and Kansas, accounted for less than one per cent of same-day visits (0.6 per cent) and just 1 per cent of overnight visits. Overseas tourists (i.e. international but excluding the U.S.), originating mostly from the United Kingdom, Germany, and Australia, accounted for less than 1 per cent of same-day visits and overnight visits.

Table 3
Most tourist visits originate from within Alberta

	Same-day visits	Overnight visits	Nights stayed
Total	4,236,602	2,681,869	5,681,866
Canada	4,199,154	2,638,754	5,457,978
Alberta	3,833,648	2,274,463	4,374,105
B.C.	195,206	185,086	553,869
Prairies	101,088	109,088	297,999
Central Canada	60,783	54,583	169,757
Atlantic Canada	3,996	9,642	42,144
Territories	4,432	3,708	12,283
United States	23,966	27,241	127,036
Other international	13,482	15,874	96,852

Sources: Signal49 Research; Environics Analytics.



Overnight visitors are the main source of tourism spending in Central Alberta

Of the over \$1 billion spent by tourists in Central Alberta in 2024, over 71 per cent came from overnight tourists while the remaining 29 per cent came from same-day tourists. Most of this spending was on food and beverages (29 per cent), vehicle operations – mainly purchases of fuel (29 per cent), and accommodations (19 per cent). (See Table 4.) Accommodation expenditures, which by definition are only made by overnight visitors to the region, were the next largest category of spending. This highlights the opportunities that could come from growing the region’s overnight-stay tourism market.

Table 4

Tourists spend the most on food & beverage, vehicle operation and accommodations
(Tourism spending, 2024 Canadian dollars, millions; per cent of total)

	Total	Overnight	Same-Day
Total	\$1,026	\$732	\$295
Accommodation	\$193	26.4%	n/a
Vehicle Rental	\$14	1.7%	0.6%
Vehicle Operation*	\$293	25.6%	36.0%
Commercial Transportation	\$3	0.3%	0.1%
Local Transportation**	\$6	0.7%	0.2%
Food and Beverage	\$296	26.1%	35.6%
Recreation & Entertainment	\$74	7.4%	6.8%
Clothing	\$57	4.9%	7.1%
Other expenditures	\$91	6.9%	13.5%

*Including gas and repairs; **Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.

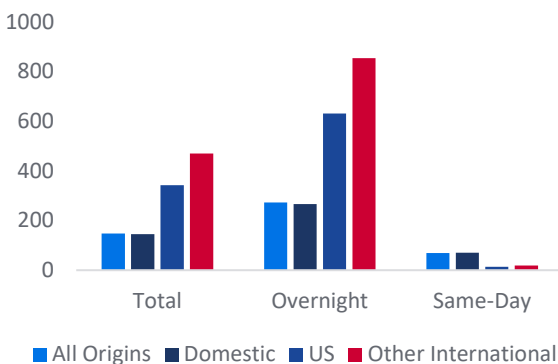


Overnight tourists spent almost four times more per trip than same-day travelers

Overnight visitors spent an average of \$273 per trip, considerably more than same-day visitors who spent an average of \$70 per trip. (See Chart 3.) This is largely because overseas visitors stayed, on average, longer per trip (6 days) than domestic tourists (2 days). (See Chart 4.) International visitors also spent nearly three times as much per trip as domestic overnightrters, further highlighting the value of drawing this type of traveler to the region.

Chart 3

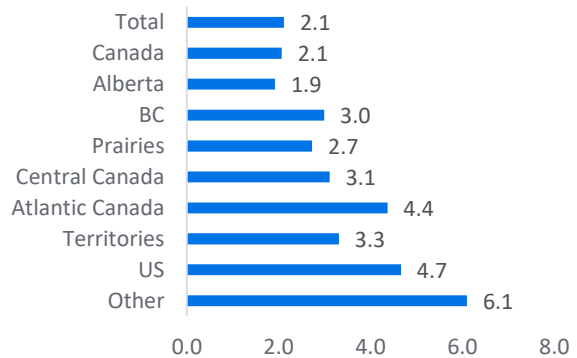
International overnight visitors generate the most revenue per trip
(Spending per trip, 2024 Canadian dollars)



Sources: Signal49 Research; Environics Analytics; Moneris.

Chart 4

International visitors spend more nights per visit
(nights stayed per overnight visit)



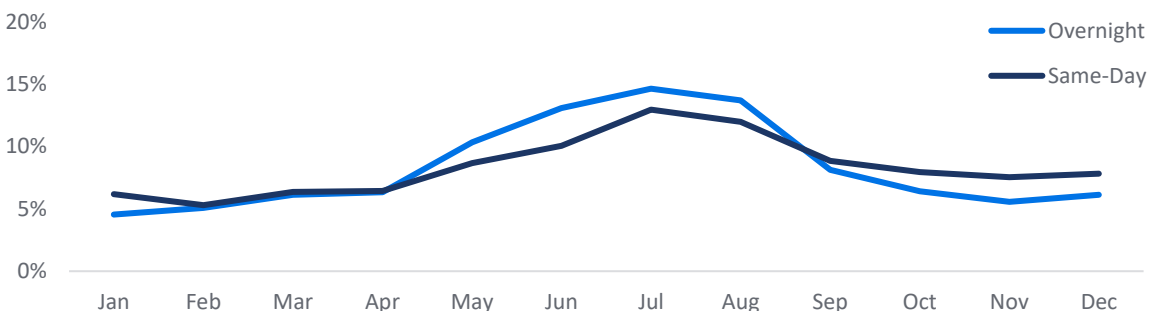
Sources: Signal49 Research; Environics Analytics; Moneris.

Central Alberta is primarily a summertime tourism destination

Tourism in Central Alberta peaks in the summer months, with 41 per cent of all overnight trips and 35 per cent of all same-day trips in 2024 occurring in June, July or August. A further 18 per cent of overnight and same-day trips were made in the shoulder months of May and September. The winter season accounted for 16 per cent of overnight trips and 19 per cent of same-day trips in 2024. (See Chart 5.) This underscores the potential to be gained by growing the region’s winter tourism market.

Chart 5

Central Alberta tourism peaks in the summer months
(Share of annual visits, by month)



Sources: Signal49 Research; Environics Analytics.

A Deeper Look at the Economic Impact of Tourism Across Central Alberta's Regions

Leveraging the novel data sources, this section will examine the economic impact of tourism on the eight regions making up the Central Alberta Tourism Alliance (CATA):

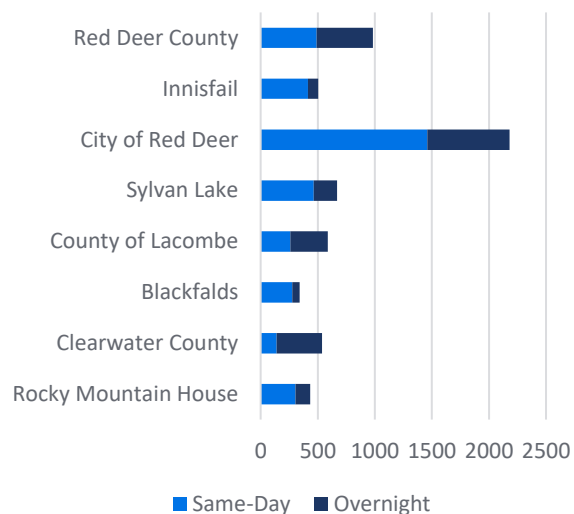
- Red Deer County [08 001]⁷
- Innisfail [08 008]
- Red Deer [08 011]
- Sylvan Lake [08 012]
- Lacombe County [08 022]
- Blackfalds [08 029]
- Clearwater County (+ Caroline) [09 002 + 09 010]
- Rocky Mountain House [09 015]

Comparing tourist flows to Central Alberta shows they are, for the most part, same-day travelers, with the City of Red seeing the most traffic. That said, Red Deer, Red Deer County, Lacombe County and Clearwater & Caroline also have

considerable shares of travelers who stay overnight. (See Chart 6.)

Chart 6

A large proportion of Central Alberta tourists are day-trippers (visits in 2024, thousands)



Sources: Signal49 Research; Environics Analytics.

⁷ These are the Census Subdivision (CSD) codes for each region, which refer to municipalities—as defined by provincial or territorial legislation—or

areas considered municipal equivalents for statistical reporting purposes.

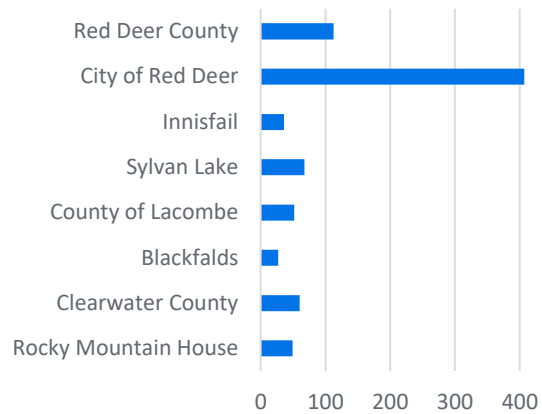


The added impact of overnight visits can be seen in the total spending by tourists in each of the Central Alberta regions. The city of Red Deer again saw the majority of these added revenues from overnight travelers. (See Chart 7.) This highlights the potential benefit for all regions from growing this element of their tourism market.

Breaking down tourism spending by category shows that there is considerable regional diversity in how tourists spend across the main categories of accommodation, food and beverage, vehicle operation, and recreation and entertainment. (See Chart 8.) For example, Red Deer and Clearwater show relative strength from accommodation spending. Innisfail and Lacombe have relatively stronger food and beverage, while Innisfail,

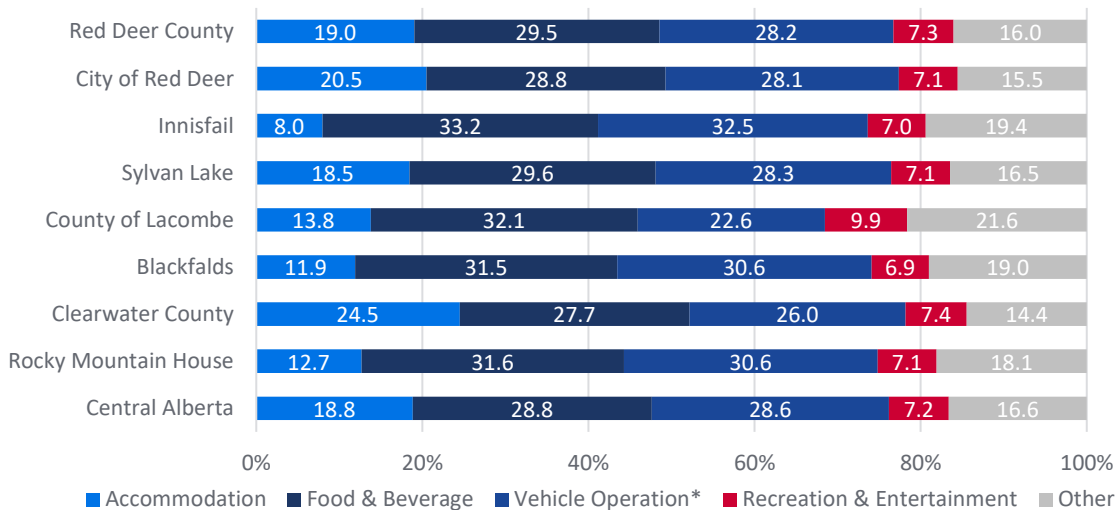
Blackfalds, and Rocky Mountain House show stronger vehicle operation shares. This highlights how the mix tourism amenities can impact a region's tourism revenue stream.

Chart 7
Tourism activity varies across regions
(total visitor spending, \$ millions)



Sources: Signal49 Research; Environics Analytics.

Chart 8
Tourism spending varies depending on the composition of local tourism sector
(tourism spending by category and region, per cent of total)



*Includes gas and repairs
Sources: Signal49 Research; Environics Analytics.

The following sections will examine each region's spending along these lines and highlight where advantage could be taken.

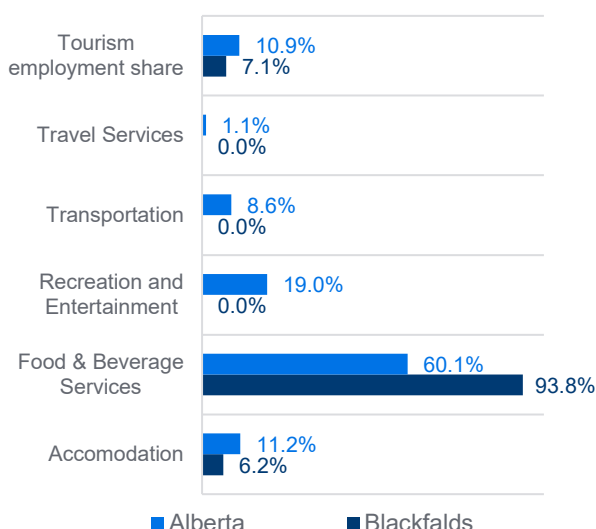


Blackfalds

Blackfalds, located a few kilometers north of Red Deer between Calgary and Edmonton, is home to 10,315 persons.⁸ The median household was \$103,000. The municipality owns and operates some of this region’s key tourism amenities such as the Abbey Centre recreational facility.⁹

Blackfalds’ tourism sector accounts for roughly 7 per cent of employment in the region, well below the provincial share of 11 per cent. Food and beverage services are by far the region’s main area of tourism employment (94 per cent), well above the provincial share of just over 60 per cent.¹⁰ (See Chart 9.)

Chart 9
Food and beverage businesses dominate the Blackfalds tourism sector (per cent of employment amongst privately operated businesses)



Sources: Signal49 Research; Statistics Canada.

Blackfalds tourism added \$23 million to Canadian GDP in 2024

Tourism in Blackfalds generated a net gain of just over \$23 million to Canada’s GDP in 2024. (See Table 5.) Overall, the economic impact of Blackfalds tourism accounts for 2.6 per cent of the sector’s total GDP impact across Central Alberta.

Tourism activity in the region also generated \$8.9 million in tax revenues across all levels of government, with the majority (62 per cent) being paid to the federal government. A quarter of tax revenues from tourism in the region went to provincial government coffers, while just over 2 per cent (\$0.2 million) tax revenues went to the municipality of Blackfalds. This local area share of tax revenue impacts is below the 3 per cent level seen for the broader Central Alberta region. (See detailed data tables in Appendix E.)

⁸ Statistics Canada. 2023. (table). Census Profile. 2021 Census of Population. Statistics Canada Catalogue no. 98-316-X2021001. Ottawa. Released November 15, 2023.

⁹ <https://visitcentralalberta.com/places/blackfalds/>

¹⁰ It is important to note that significant tourism supporting infrastructure is provided by the local municipal government and, as such, is not considered part of the tourism industry itself in the region



Table 5

Tourism in Blackfalds added over \$23 million to Canadian GDP in 2024
(Total economic impact, 2024 Canadian dollars, thousands)

	Blackfalds	Alberta, total	Canada, total
GDP (\$ thousands)	\$11,081	\$18,341	\$23,151
Income (\$ thousands)	\$6,604	\$10,354	\$13,132
Employment (jobs)	123	162	196

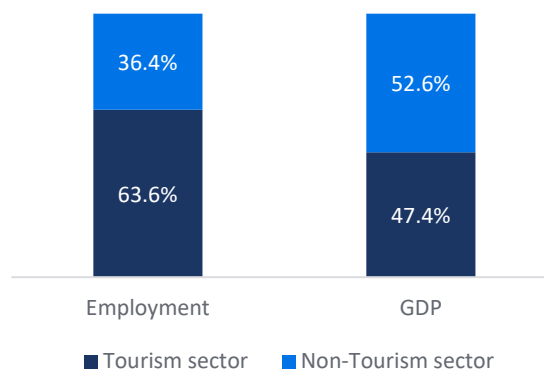
Source: Signal49 Research.

Tourism supported 123 jobs in the region, or 2.2 per cent of total employment in Blackfalds. This is relatively low compared to the rest of Central Alberta, which typically sees 3 to 5 per cent of total employment being generated from the activities of the tourism sector.

Almost 64 per cent of jobs supported by tourism were directly in the tourism sector, slightly above the Central Alberta average of just over 61 per cent, while 36 per cent of employment due to tourism in the region was outside the tourism sector. Just over 47 per cent of GDP generated by tourism came from businesses inside the tourism sector, roughly equal to the Central Alberta average, while almost 53 per cent of GDP generated came from businesses in other sectors of the region's economy. (See Chart 10.)

Chart 10

Tourism impact in Blackfalds mirrors that of the broader Central Alberta region
(jobs supported, GDP generated)



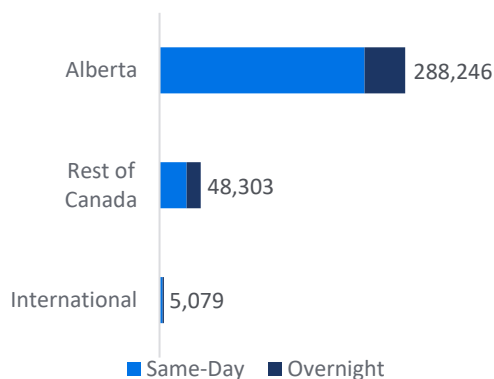
Source: Signal49 Research.

Blackfalds had the fewest overnight trips among CATA members

Blackfalds welcomed 275,939 same-day visitors, and 65,693 overnight visitors who stayed a total of 137,566 nights. (See Chart 11.) Nearly all visits were made by Canadians, making up 98.7 per cent of same-day visits, and 97.6 per cent of all overnight visits. Albertans made up 87.2 per cent of same-day visits, 72.4 per cent of overnight visits and 61.4 per cent of nights. American visitors accounted for under one per cent of same-day visits (0.8 per cent) and 1.4 per cent of overnight visits, while other international made up 0.5 per cent and 1 per cent, respectively.

Chart 11

More foreign visitors to Blackfalds led to more overnight stays



Sources: Signal49 Research; Environics Analytics.

Though less common, overnight tourists accounted for two-fifths of tourism spending in Blackfalds

Of the \$27.2 million spent by tourists in Blackfalds in 2024, 43 per cent came from overnight tourists while the remaining 57 per cent came from same-day tourists. In most regions in Central Alberta, overnight visitors made up the bulk of tourism spending. Spending by point of origin was slightly less linked to traveler origin with almost 89.6 per cent of spending by overnighting tourist coming from Canadian visitors, while spending by same-day tourists remained highly Canadian-driven (98.7 per cent). As seen for the overall Central Alberta region, overnighting travelers to Blackfalds spent roughly a third on accommodation (27.8 per cent), a third on vehicle operation (24 per cent), and a third on food and beverage (25.9 per cent). Same-day tourists to Blackfalds spent roughly equal amounts (36 per cent) on vehicle operating costs (mainly for fuel purchases) and food and beverage spending (35.9 per cent). (See Table 6.)

Table 6

Spending in Blackfalds has a more balanced split between overnight and same-day tourists (Tourism spending, 2024 Canadian dollars, thousands; per cent of total)

	Total	Overnight	Same-Day
Total	\$27,193	\$11,647	\$15,546
Accommodation	\$3,240	27.8%	n/a
Vehicle Rental	\$438	2.9%	0.6%
Vehicle Operation*	\$8,327	24.0%	35.6%
Commercial Transportation	\$55	0.3%	0.1%
Local Transportation**	\$106	0.6%	0.2%
Food and Beverage	\$8,579	25.7%	35.9%
Recreation & Entertainment	\$1,881	7.1%	6.8%
Clothing	\$1,669	4.8%	7.2%
Other expenditures	\$2,899	6.7%	13.6%

*Including gas and repairs; **Within Canada. Includes trains, buses, etc.

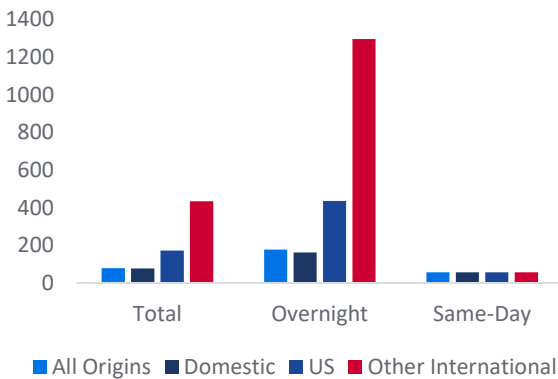
Sources: Signal49 Research; Environics Analytics; Moneris.



International tourism is the region’s highest “per-visit” spending group

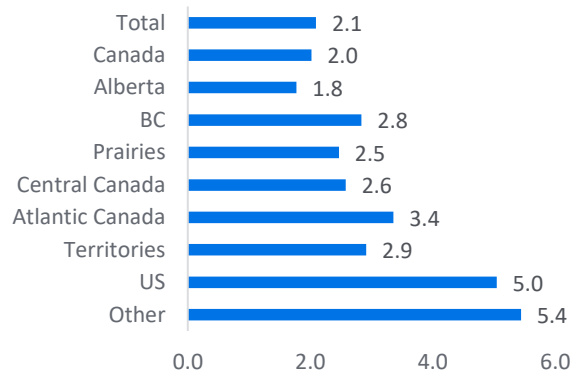
Non-U.S. overnight visitors are particularly valuable to the Blackfalds region, spending considerably more per trip than their North American counterparts. (See Chart 12.) This is driven by the relatively longer stays of overseas visitors (5.4 days per visit). (See Chart 13.)

Chart 12
Average spending per visit much higher for international travelers
(Spending per trip, 2024 Canadian dollars)



Sources: Signal49 Research; Environics Analytics; Moneris.

Chart 13
International visitors stay longer than domestic visitors
(nights stayed per overnight visit)

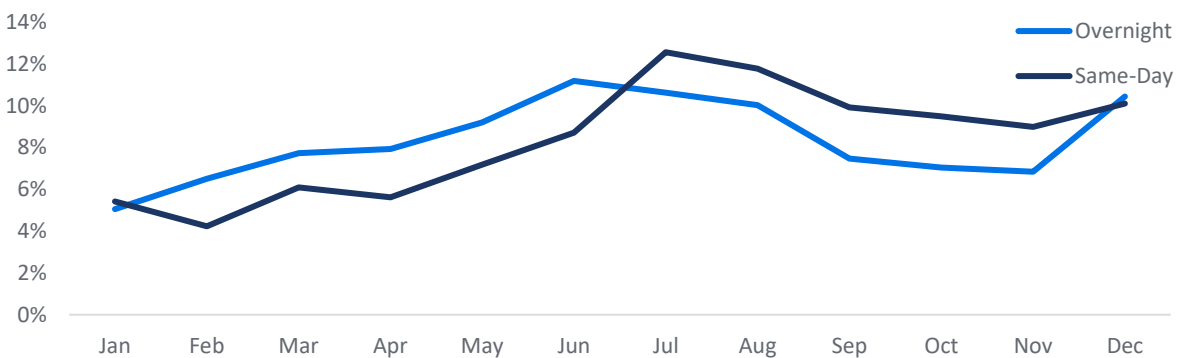


Sources: Signal49 Research; Environics Analytics; Moneris.

Blackfalds tourism is less seasonal than most regions in Central Alberta

Blackfalds is one of the most popular tourist regions during the winter months with December having almost as many visitors as July possibly due to its proximity to the Canyon Skill Hill. That said, tourism in the region still peaks in the summer months. (See Chart 14.)

Chart 14
Blackfalds tourism is more consistent than average through the winter months
(Share of annual visits, by month)



Sources: Signal49 Research; Environics Analytics.



Clearwater County and Caroline

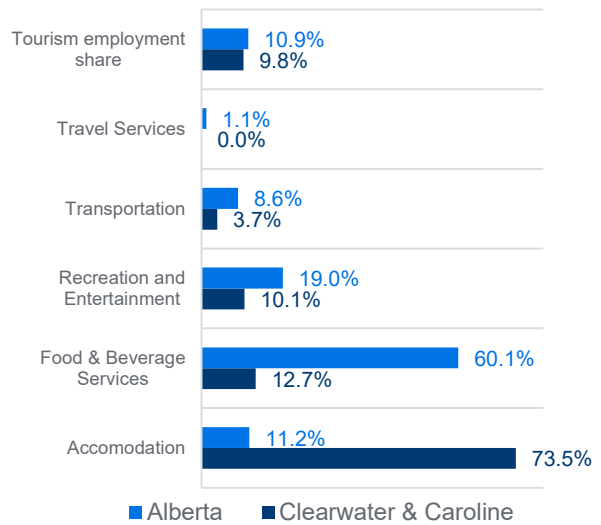
Clearwater County is situated in the west of Central Alberta, bordering the Banff and Jasper National Parks. Caroline is a village surrounded by Clearwater County. For this analysis these regions were grouped together because of their recent amalgamation. The combined region (“Clearwater”) offers eco-tourism options with numerous camping grounds, fishing and big game hunting. The region is also home to David Thompson Country; a tourism hub focused on the outdoors. The area has a population of over 13,000 and a median annual household income of \$83,000.

The Clearwater tourism sector accounts for almost 10 per cent of employment in the region, just below the provincial share of 11 per cent. Accommodation is the region’s main area of tourism employment (74 per cent), well above the provincial share. Conversely, employment by food and

beverage businesses is well below the provincial share.¹¹ (See Chart 15.)

Chart 15

Accommodation is a main cog in the Clearwater tourism sector (per cent of employment amongst privately operated businesses)



Sources: Signal49 Research; Statistics Canada.

Clearwater County tourism added nearly \$54 million to Canada’s GDP in 2024

Tourism spending in Clearwater County and Caroline generated \$54.0 million in GDP in 2024, roughly 6 per cent of the total GDP impact of tourism across Central Alberta. (See Table 7.)

Tourism to the region also generated \$19.8 million tax revenues in 2024, of which just over \$12 million went to the federal government. Just over one quarter of generated tax revenues went to the province while 2.5 per cent accrued to the Clearwater County municipality. (See detailed data tables in Appendix E.)

¹¹ Significant tourism supporting infrastructure may be provided by the local municipal government and,

as such, would not be considered part of employment in the tourism industry.



Table 7

Tourism in Clearwater County and Caroline generated \$54 million in GDP in 2024

(Total economic impact, 2024 Canadian dollars, thousands)

	Clearwater	Alberta, total	Canada, total
GDP (\$ thousands)	\$28,089	\$43,394	\$54,020
Income (\$ thousands)	\$16,349	\$24,753	\$30,935
Employment (jobs)	285	373	451

Source: Signal49 Research.

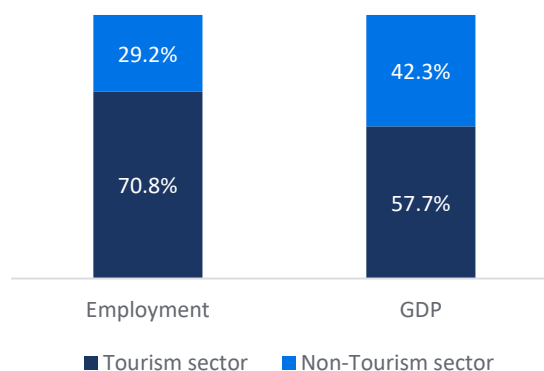
Overall, economic impacts from tourism in Clearwater and Caroline accrued largely to the tourism sector in comparison to the broader region.

Almost 71 per cent of jobs supported by Clearwater and Caroline tourism were directly in the tourism sector, well above the Central Alberta share of just over 61 per cent.

Similarly, almost 58 per cent of GDP generated by tourism came from businesses inside the tourism sector compared to just under 47 per cent of GDP for all of Central Alberta. (See Chart 16.)

Chart 16

Employment impacts are important for Clearwater County's tourism sector (jobs supported, GDP generated)



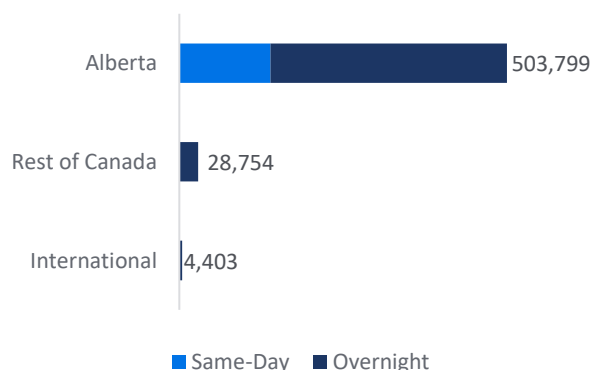
Source: Signal49 Research.

Clearwater County visitors were mostly Albertans who tended to stay the night

Clearwater County welcomed 140,840 same-day visitors, and 396,117 overnight visitors who stayed a total of 850,893 nights. (See Chart 17.) Visits, visitors, and nights stayed to Clearwater were mostly Canadians, accounting for essentially of all the same-day visits (99.6 per cent) and overnight visits (98.9 per cent). Albertans themselves accounted for over 99 per cent of the same-day visits, 92 per cent of the overnight visits and just over 90 per cent of the nights stayed. As for U.S. and overseas visitors, Clearwater County had the fewest international visits amongst CATA members in 2024.

Chart 17

Virtually all same-day visits to Clearwater originated from within the province



Sources: Signal49 Research; Environics Analytics.

Tourist spending in Clearwater comes primarily from overnight visitors

Tourists spent just over \$60 million dollars in the region in 2024, with 90 per cent coming from overnight visitors and the remaining 10 per cent from same-day travelers. Overnight visitors typically account for the bulk of tourism spending in most areas of Central Alberta, but this split is particularly pronounced in Clearwater. Spending by point of origin was heavily Canadian based with 96 per cent of spending by overnighting tourist and virtually all spending by same-day tourists coming from Canadian travelers. (See Table 9.)

Food and beverage is the largest area of tourism spending, accounting for 28 per cent of the region's total and roughly equal to the share seen for all of Central Alberta. Vehicle operation and accommodation spending were close runners-up at 26 per cent of and nearly 25 per cent respectively. Accommodation spending in the region was notably above that seen for Central Alberta (19 per cent). (See Table 8.)

Table 8

Almost all of tourism spending came from overnight tourists in Clearwater County
(Tourism spending, 2024 Canadian dollars, thousands; per cent of total)

	Total	Overnight	Same-Day
Total	\$60,170	\$53,877	\$6,293
Accommodation	\$14,734	27.3%	n/a
Vehicle Rental	\$469	0.8%	0.6%
Vehicle Operation*	\$15,649	24.9%	35.6%
Commercial Transportation	\$196	0.3%	0.1%
Local Transportation**	\$390	0.7%	0.2%
Food and Beverage	\$16,653	26.7%	35.9
Recreation & Entertainment	\$4,443	7.4%	6.8%
Clothing	\$3,067	4.9%	7.2%
Other expenditures	\$4,569	6.9%	13.6%

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.

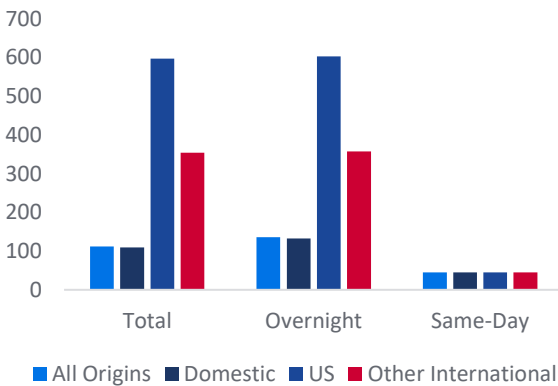


American tourists are Clearwater County's biggest "per-visit" spenders

While visitors to Clearwater from outside Canada spent much more than their Canadian counterparts, it is U.S. travelers that spent the most per trip. (See Chart 18.) American travelers also stayed in the region more nights than other group (3.1 nights), though still well below the CATA average nights per visit of just over 6 nights. (See Chart 19.)

Chart 18

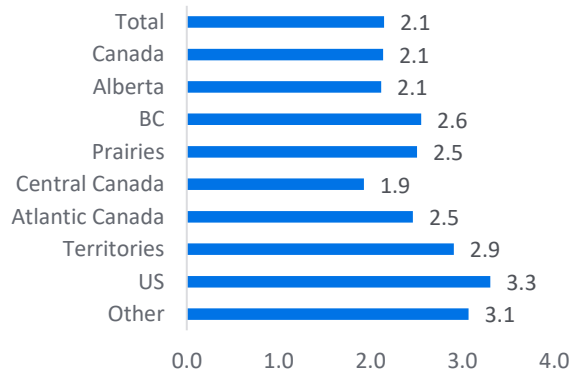
Average spending is highest amongst U.S. visitors
(Spending per trip, 2024 Canadian dollars)



Sources: Signal49 Research; Environics Analytics; Moneris.

Chart 19

Overseas visitors to Clearwater tend to stay fewer nights than average
(nights stayed per overnight visit)



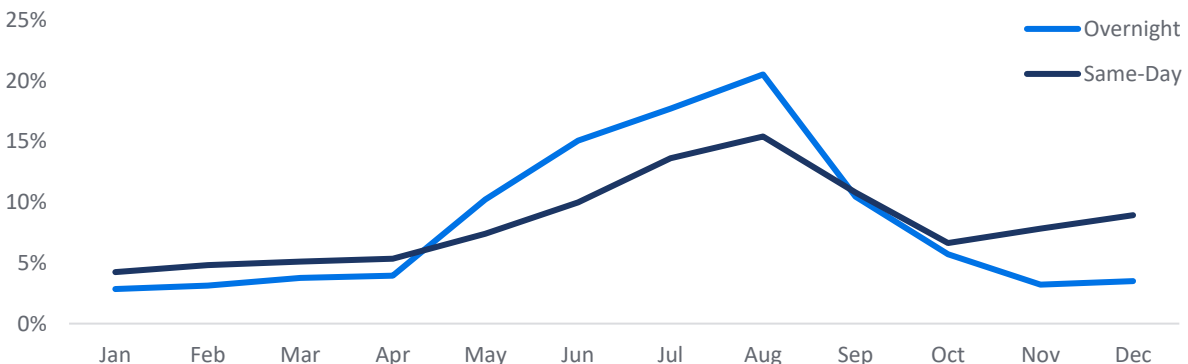
Sources: Signal49 Research; Environics Analytics; Moneris.

Clearwater County's tourism activity swells in the summer

Summer outdoor recreation is a large driver of tourism activity in Clearwater County making it one of the most seasonal tourism regions in Central Alberta. Visits are skewed to the summer, which saw 53 per cent of overnight tourism activity, the highest peak seen in the Central Alberta regions. Winter is a very quiet season for Clearwater, with less than 10 per cent of overnight trips occurring between December and February. (See Chart 20.)

Chart 20

More than half of overnight visits occurred in the summer
(Share of annual visits, by month)



Sources: Signal49 Research; Environics Analytics.



City of Red Deer

Situated roughly half-way between Calgary and Edmonton, the city of Red Deer is the largest census subdivision in Central Alberta. Red Deer has a population of over 100,000 and a median household income of \$85,000, slightly below the provincial average. Red Deer offers amenities and activities typical of a standard mid-size Canadian city, such as museums, art galleries, concert venues, as well as a host of other activities.

The tourism sector of Red Deer, and that of the province as a whole account, for identical shares (11 per cent) of total employment in their respective areas. Food and beverage businesses are the main source of tourism employment in Red Deer (67 per cent), noticeably above its provincial share (60 per cent).¹² (See Chart 21.)

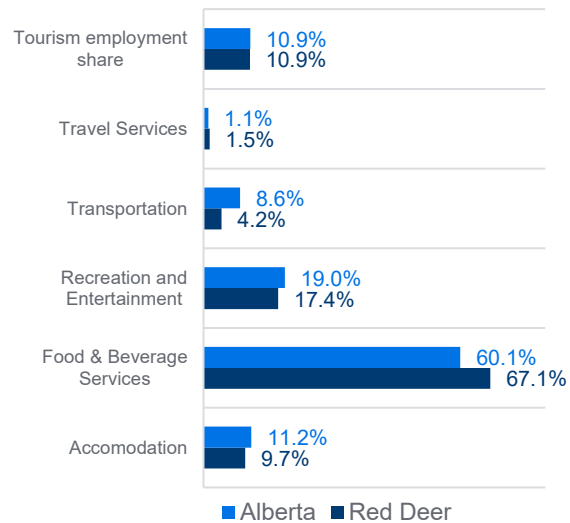
Red Deer is Central Alberta’s tourist hub

Tourists spent an estimated \$407 million in Red Deer in 2024, generating almost \$359 million in GDP for the country. (See Table 9.) Red Deer alone accounts for almost 40 per cent of the total GDP impact of the tourist sector in Central Alberta.

Red Deer tourism also generated \$134 million in tax revenues in 2024. Nearly two thirds (62 per cent) of those revenues went to the federal government. Over one quarter (26 per cent) of tax revenue went to the government of Alberta. An estimated \$3.8 million in tax revenues from tourism in the region (3 per cent) went to the City of Red Deer. (See detailed data tables in Appendix E.)

Chart 21

Food and beverage businesses anchor the Red Deer tourism sector (per cent of employment amongst privately operated businesses)



Sources: Signal49 Research; Statistics Canada.

¹² Significant tourism supporting infrastructure and employment may be provided by the local municipal

government and, as such, would not be considered part of employment in the tourism industry.



Table 9

Tourism in Red Deer added \$359 million to Canadian GDP in 2024

(Total economic impact, 2024 Canadian dollars, thousands)

	Red Deer	Alberta, total	Canada, total
GDP (\$ thousands)	\$201,893	\$287,153	\$358,987
Income (\$ thousands)	\$116,680	\$163,086	\$204,742
Employment (jobs)	2,015	2,485	3,007

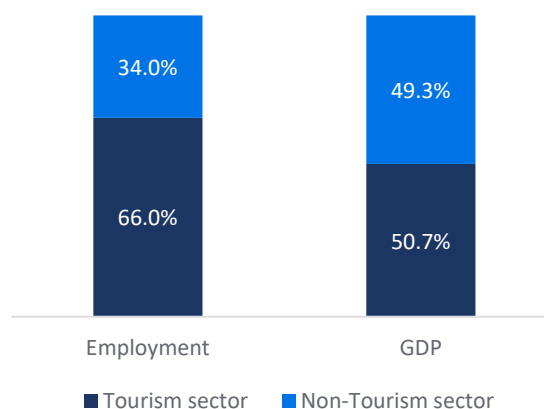
Source: Signal49 Research.

Tourism supported 2,015 jobs in Red Deer in 2024, or 4 per cent of total employment in the city. (See Table 10.) Two thirds (66 per cent) of those jobs were directly in the tourism sector while 34 per cent were outside the tourism sector (See Chart 22.)

GDP impacts from tourism in Red Deer were almost equally split between businesses inside the tourism sector (51 per cent) of GDP and businesses in other sectors of the region's economy (49 per cent). Overall, this GDP and employment impact split closely follows that of the broader Central Alberta region.

Chart 22

Red Deer's tourism impact split follows that of the broader region (jobs supported, GDP generated)



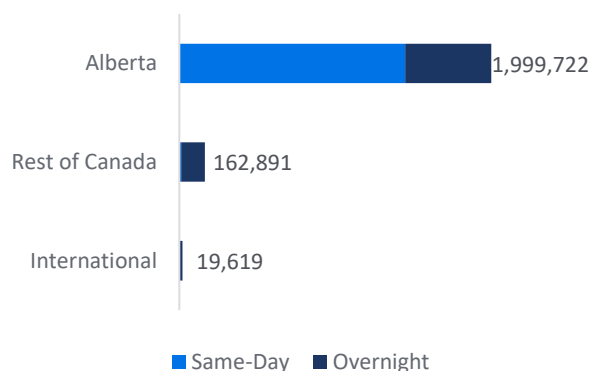
Source: Signal49 Research.

Albertans are slightly less prominent in tourism visits to the City of Red Deer

Red Deer received 1.46 million same-day visitors, and 720,429 overnight visitors who stayed for a total of 1.48 million nights. (See Chart 23.) Visitors were almost entirely Canadian (99.9 per cent same-day, 98 per cent overnight). While Albertans dominated same-day travel (99 per cent), they were less prominent in the overnight market, accounting for 77 per cent of overnight visits and 66 per cent of nights stayed in 2024. This market diversity is highlighted by U.S. and other international tourists, whose combined share of nights stayed was double that of the Central Alberta region.

Chart 23

Most tourists to Red Deer were Canadian residents



Sources: Signal49 Research; Environics Analytics.

Tourists spend more in Red Deer than anywhere else in Central Alberta

Tourists spent an estimated \$407.2 million dollars in the City of Red Deer in 2024. Compared to Central Alberta, slightly more spending (75 per cent) in Red Deer came from overnight tourists. Canadian travelers remain the main source of tourism revenues, accounting for 96.4 per cent of overnighting tourist spending, and over 99 per cent of spending by same-day tourists spending. Overnight tourists split their expenditures across accommodation (27 per cent), vehicle operation (26 per cent), and food and beverage (27 percent). Same-day tourists spent almost equal amounts on vehicle operation (36 per cent) and food and beverage purchases (37 per cent). (See Table 10.)

Table 10

A large share of tourism spending came from overnight tourists in Red Deer
(Tourism spending, 2024 Canadian dollars, thousands; per cent of total)

	Total	Overnight	Same-Day
Total	\$407,192	\$306,445	\$100,746
Accommodation	\$83,522	27.3%	n/a
Vehicle Rental	\$3,035	0.8%	0.6%
Vehicle Operation*	\$114,452	25.7%	35.6%
Commercial Transportation	\$1,042	0.3%	0.1%
Local Transportation**	\$2,059	0.6%	0.2%
Food and Beverage	\$117,073	26.4%	35.9%
Recreation & Entertainment	\$28,928	7.2%	6.8%
Clothing	\$22,222	4.9%	7.2%
Other expenditures	\$34,859	6.9%	13.6%

*Including gas and repairs; **Within Canada. Includes trains, buses, etc.
Sources: Signal49 Research; Environics Analytics; Moneris.

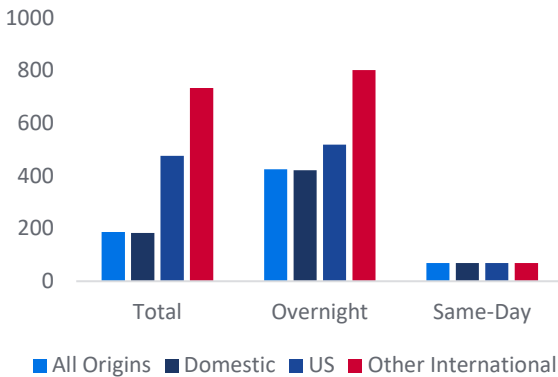
Tourists in Red Deer spend more per trip than anywhere else in Central Alberta

International visitors to Red Deer outspent domestic ones, and the city had the highest average spending per trip (\$187) compared to Central Alberta (\$149).¹³ (See Chart 24.) The average overnight stay was 2.1 nights, but international tourists stayed an average of 7.1 nights, the longest for overseas visitors in Central Alberta. (See Chart 25.)

¹³ Note: Chart 1 implies Central Alberta trips generate more revenue than Red Deer alone, though a single Central Alberta trip can include visits (and spending) in more than one CATA region. Red Deer is the single subregion that generates the most revenue per trip across CATA.

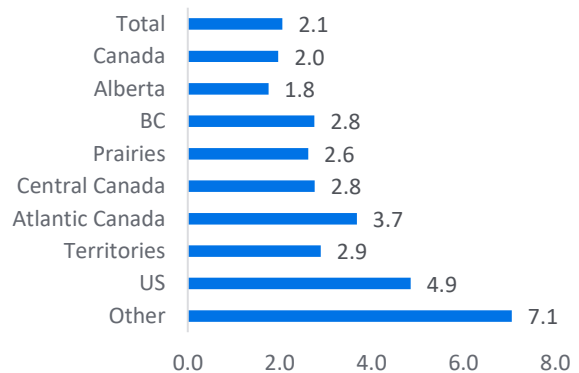


Chart 24
Average spending per traveler is higher in Red Deer
(Spending per trip, 2024 Canadian dollars)



Sources: Signal49 Research; Environics Analytics; Moneris.

Chart 25
International visitors three times longer in Red Deer than domestic visitors
(nights stayed per overnight visit)

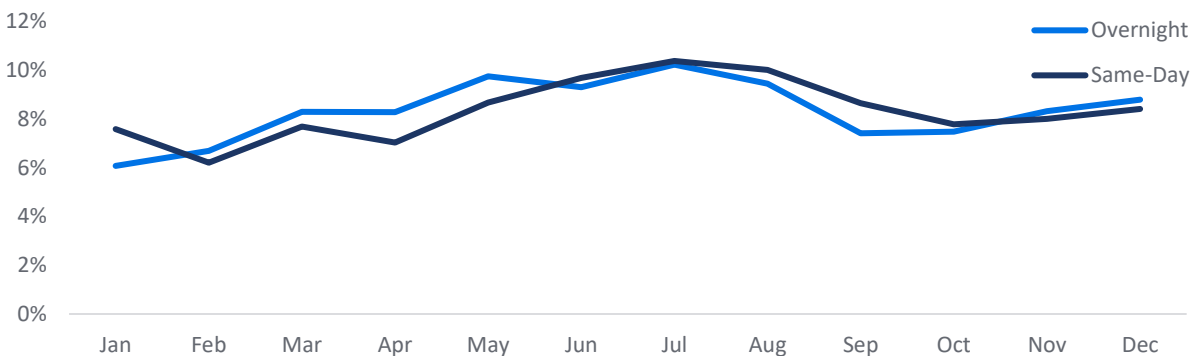


Sources: Signal49 Research; Environics Analytics; Moneris.

Red Deer is a year-round tourist destination

While Central Alberta's tourism spikes in summer, Red Deer is a year-round destination with the region's lowest seasonal variance. Winter accounted for 22 per cent of overnight visits and 22 per cent of same-day visits, while summer comprised roughly 30 per cent of all tourism traffic. (See Chart 26.) This is likely the result of it being a mid-sized city offering year-round activities.

Chart 26
Red Deer tourism is the most seasonal balanced of all Central Alberta regions
(Share of annual visits, by month)



Sources: Signal49 Research; Environics Analytics.



Innisfail

Located in the south of Red Deer County, between Red Deer and Calgary, Innisfail offers many attractions including golf courses, art galleries, and museums. It is also home to the Discovery Wildlife Park, a sanctuary for orphaned wildlife open to the public. Innisfail has a population of 7,985, making it the second least populous CATA member, and a median annual household income of \$76,500.

The Innisfail tourism sector accounts for 8 per cent of employment in the region, well below the provincial share of 11 per cent. Food and beverage service businesses are the region’s main area of tourism employment (61 per cent), matching their provincial share. Recreation and entertainment employment is also a main tourist sector employer in the region (31 per cent) well above the provincial share seen for that market segment.¹⁴ (See Chart 27.)

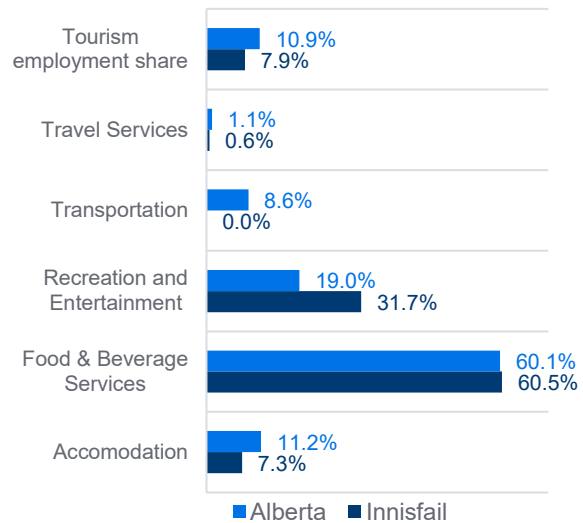
Innisfail tourism added nearly \$30 million to GDP

Tourists spent an estimated \$36 million in Innisfail in 2024, generating nearly \$30 million in GDP impacts. (See Table 11.)

Innisfail tourism also generated just under \$12 million in tax revenues in 2024. Nearly two thirds (63 per cent) of tax revenue went to the federal government, and one quarter went to the government of Alberta. Equal shares of 2 per cent went to the municipality of Innisfail and to other municipalities within Alberta. (See detailed data tables in Appendix E.)

Chart 27

Food and beverage businesses are key to the Innisfail tourism sector (per cent of employment amongst privately operated businesses)



Sources: Signal49 Research; Statistics Canada.

¹⁴ Significant tourism supporting infrastructure may be provided by the local municipal government and,

as such, would not be considered part of employment in the tourism industry.



Table 11

Tourism in Innisfail added \$30 million to Canadian GDP in 2024
(Total economic impact, 2024 Canadian dollars, thousands)

	Innisfail	Alberta, total	Canada, total
GDP (\$ thousands)	\$14,328	\$23,522	\$29,879
Income (\$ thousands)	\$8,316	\$13,283	\$16,944
Employment (jobs)	161	211	257

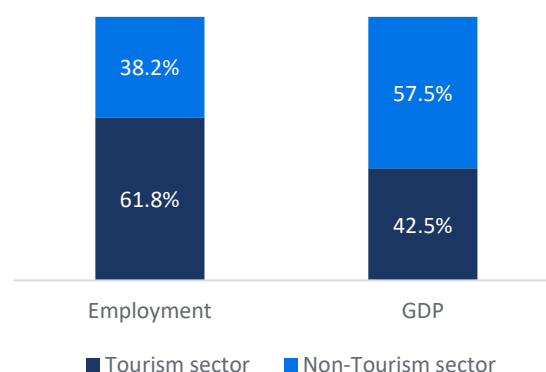
Source: Signal49 Research.

The total employment supported by tourism was 161 jobs, or 4 per cent of total employment in Innisfail. (See Table 11.) Just under two thirds (62 per cent) of those jobs were directly in the tourism sector while 38 per cent were outside the tourism sector.

GDP impacts from tourism in Innisfail came more from businesses outside the region’s tourism sector (58 per cent) than from businesses inside the region’s tourism sector (43 per cent). (See Chart 28.)

Chart 28

Tourism supported 161 jobs in Innisfail in 2024
(jobs supported, GDP generated)



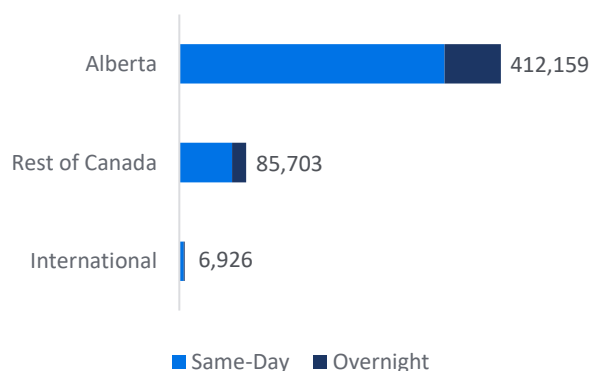
Source: Signal49 Research.

Same-day tourism is Innisfail’s bread and butter

Innisfail welcomed 413,232 same-day visitors, and 91,555 overnight visitors who stayed a total of 152,008 nights. (See Chart 29.) Visitors were almost entirely Canadian, comprising 98.6 per cent of day visits and 98.8 per cent of overnight stays. Albertans, whose share was proportionately lower than for the Central Alberta region, accounted for 82.3 per cent of day visits, 79 per cent of overnight visits, and 69 per cent of nights. International tourism was minimal: U.S. visitors made up 1 per cent of day and 0.9 per cent of overnight visits, while other international tourists accounted for 0.4 per cent of both.

Chart 29

Same-day visits dominate the Innisfail tourism picture



Sources: Signal49 Research; Environics Analytics.



Innisfail tourism revenue also depends more heavily on day-trippers

Tourists spent an estimated \$35.8 million dollars in Innisfail in 2024. While most regions earn more tourism revenue from overnight visits, 71 per cent of all tourism spending in Innisfail came from same-day visits. Canadian travelers account for 95 per cent of overnighting tourist spending, and over 98.6 per cent of spending by same-day tourists spending. Overnight tourists put most of their spending into accommodation (28 per cent), vehicle operation (25 per cent), and food and beverage (26.5 per cent). Same-day tourists spent almost equal proportions on vehicle operation (36 per cent) and food and beverage purchases (37 per cent). (See Table 12.)

Table 12

Tourism spending is uniquely led by same-day tourists in Innisfail
(Tourism spending, 2024 Canadian dollars, thousands; per cent of total)

	Total	Overnight	Same-Day
Total	\$35,801	\$10,390	\$25,410
Accommodation	\$2,855	27.5%	n/a
Vehicle Rental	\$256	0.9%	0.6%
Vehicle Operation*	\$11,625	24.9%	35.6%
Commercial Transportation	\$64	0.3%	0.1%
Local Transportation**	\$122	0.7%	0.2%
Food and Beverage	\$11,884	26.5%	35.9%
Recreation & Entertainment	\$2,498	7.4%	6.8%
Clothing	\$2,324	4.9%	7.2%
Other expenditures	\$4,173	6.9%	13.6%

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.

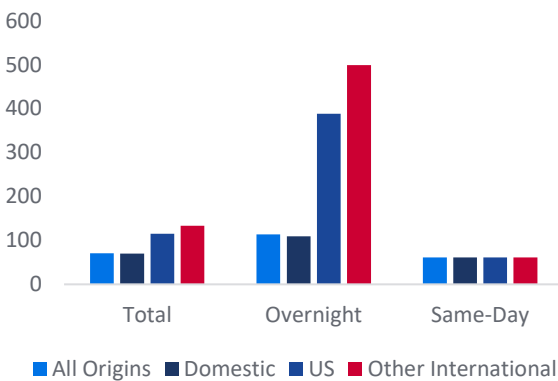


Overnight international tourists stay longer and spend more per visit

Although same-day visits make up the bulk of the tourism revenue, per-trip revenue is higher for overnight visits. (See Chart 30.) The average length of stay for overnight tourism was roughly 1.7 nights per visit, with international tourists staying nearly twice as long (4.5 nights) as Canadian travelers to the region (1.6 nights). (See Chart 31.)

Chart 30

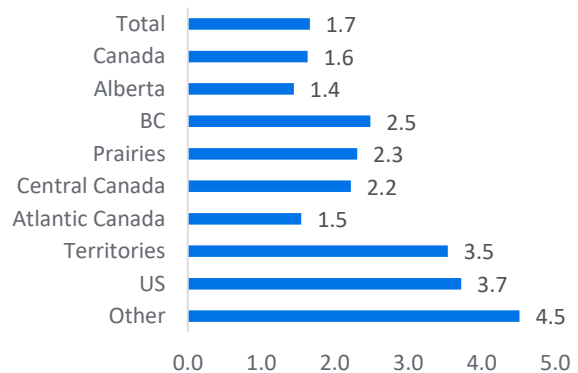
International visitors spend more on a per visits basis than domestic visitors (2024 Canadian dollars)



Sources: Signal49 Research; Environics Analytics; Moneris.

Chart 31

Longer stays by international visitors boosts their spending impact (nights stayed per overnight visit)



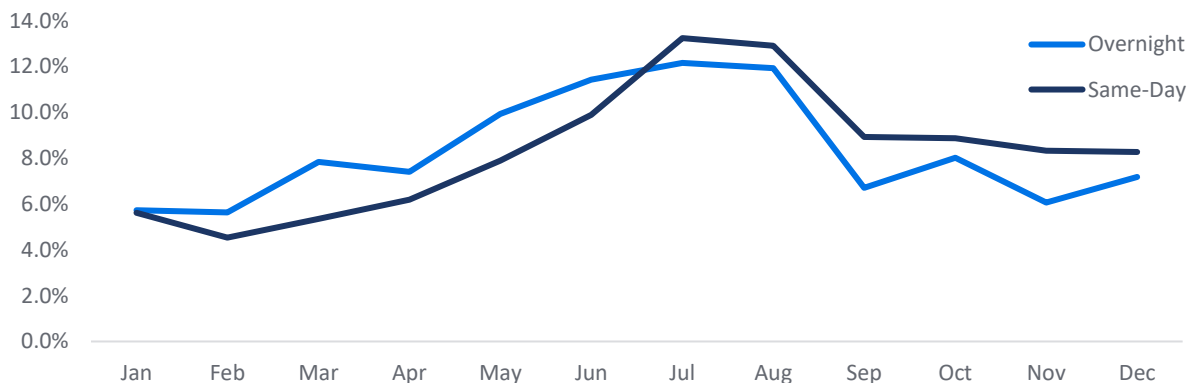
Sources: Signal49 Research; Environics Analytics; Moneris.

Innisfail tourism activity remains strong in the fall season

Innisfail tourism peaks in the summer, with 36 per cent of overnight visits and 36 per cent of same-day visits occurring during the summer months in 2024. But unlike some of its regional peers, fall tourism to Innisfail also remains relatively strong, accounting for just over 26 per cent of same-day visits and 21 per cent of overnight visits. This is likely due in part to Innisfail's golfing amenities that help draw spring and fall tourism to the region. (See Chart 32.)

Chart 32

Innisfail tourism activity remains robust through the fall months (Share of annual visits, by month)



Sources: Signal49 Research; Environics Analytics.



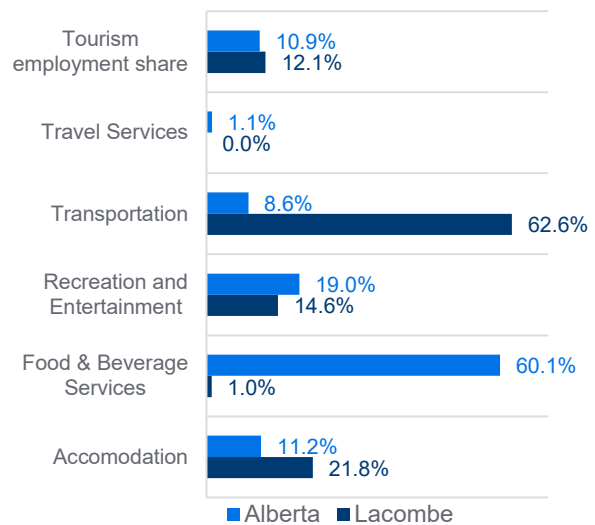
Lacombe County

Lacombe County is situated north of Red Deer County, between the City of Red Deer and Edmonton. Key tourist attractions in the region include the Canyon Ski Resort, a strong contingent of golf courses, campgrounds and RV parks. Lacombe county has a population of 10,283 and a median household income of \$89,000 per year.

The Lacombe tourism sector accounts for 12 per cent of employment in the region, just over the provincial share of 11 per cent. Transportation businesses are the region’s main area of tourism employment (60 per cent), well above their provincial share of less than 9 per cent. Conversely, food and beverage service businesses account for just 1 per cent of tourism employment in the region compared to 60 per cent for the province.¹⁵ (See Chart 33.)

Chart 33

Transportation businesses are key employers in the Lacombe tourism sector (per cent of employment amongst privately operated businesses)



Sources: Signal49 Research; Statistics Canada.

Lacombe County has an outsized impact for its size

Tourism spending in Lacombe generated a net gain of over \$44 million to Canada’s GDP in 2024. (See Table 13.) This is the largest GDP impact per capita across all regions studied, with \$6,600 generated per inhabitant, reflecting the importance of the sector for this region. Overall, the economic impact of Lacombe Country tourism accounts for 5 per cent of the industry’s total GDP impact across Central Alberta.

Tourism activity in the region generated just over \$16 million in tax revenues across all levels of government with the majority (62 per cent) being paid to the federal government. A quarter of tax revenues from tourism in the region went to provincial government coffers while 2.5 per cent (\$0.41 million) tax revenues went to Lacombe. This local area share of tax revenues is just slightly below the 3 per cent level seen for the Central Alberta region. (See detailed data tables in Appendix E.)

¹⁵ Significant tourism supporting infrastructure may be provided by the local municipal government and,

as such, would not be considered part of employment in the tourism industry.



Table 13

Tourism in Lacombe County added \$44 million to Canadian GDP in 2024

(Total economic impact, 2024 Canadian dollars, thousands)

	Lacombe County	Alberta, total	Canada, total
GDP (\$ thousands)	\$21,305	\$35,175	\$44,445
Income (\$ thousands)	\$13,275	\$20,449	\$25,871
Employment (jobs)	247	322	390

Source: Signal49 Research.

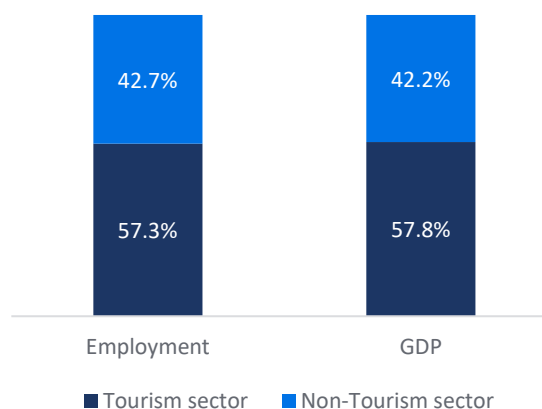
Tourism supported 247 local jobs, which is equal to 4 per cent of total employment in Lacombe County. (See Table 13.) Just over 57 per cent of those jobs were directly in the tourism sector while 43 per cent were outside the tourism sector, closely aligned with that of the broader region.

GDP impacts on the other hand diverge from the almost 50-50 split found in Central Alberta, with 58 per cent of the GDP impacts coming from the sector itself, while 42 per cent comes from businesses in other sectors of the region's economy. (See Chart 34.)

Chart 34

GDP impacts relatively more important for Lacombe's tourism sector

(jobs supported, GDP generated)



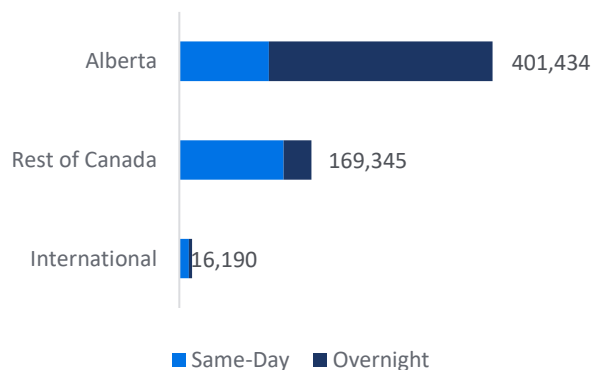
Source: Signal49 Research.

Lacombe County is a popular overnight destination, mainly for domestic tourists

In 2024, Lacombe welcomed 260,470 same-day visitors, and 326,499 overnight visitors who stayed a total of 624,968 nights. (See Chart 35.) Canadians were the dominant group, comprising 95 per cent of same-day and 99 per cent of overnight visits. While Albertans' share of day visits was low at 44 per cent (fewer than Central Alberta), they still made up 88 per cent of overnight visits and 85 per cent of nights. American and overseas visitors had small, roughly equal shares of same-day (2.6 per cent, 2.0 per cent) and overnight (0.7 per cent, 0.5 per cent) visits, respectively.

Chart 35

A high share of same-day visitors originated outside the province



Sources: Signal49 Research; Environics Analytics.



Virtually all tourism revenue in Lacombe came from domestic tourists

Tourists spent \$51.7 million in Lacombe County in 2024. Overnight visitors accounted for 68 per cent of this total, slightly below the Central Alberta average of 71 per cent. Canadian travelers are again the main revenue source accounting for 97 per cent of overnighting tourist spending, and 94 per cent of same-day tourist spending. Overnight tourists to Lacombe put noticeably less of their spending into accommodation (20 per cent) and vehicle operation (19 per cent) but proportionately more into recreation and entertainment (11 per cent) than seen for Central Alberta overall. Same-day travelers to Lacombe spent more on food and beverage (39 per cent) and less on vehicle operation (31 per cent) than seen for Central Alberta. (See Table 14.)

Table 14

Tourism spending by overnight visitors more than double that of same-day visitors

(Tourism spending, 2024 Canadian dollars, thousands; per cent of total)

	Total	Overnight	Same-Day
Total	\$51,703	\$35,172	\$16,530
Accommodation	\$7,136	20.3%	n/a
Vehicle Rental	\$642	1.5%	0.7%
Vehicle Operation*	\$11,660	18.7%	30.8%
Commercial Transportation	\$204	0.5%	0.1%
Local Transportation**	\$404	1.0%	0.2%
Food and Beverage	\$16,603	29.1%	38.6%
Recreation & Entertainment	\$5,132	11.2%	7.3%
Clothing	\$3,850	7.3%	7.7%
Other expenditures	\$6,073	10.4%	14.6%

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

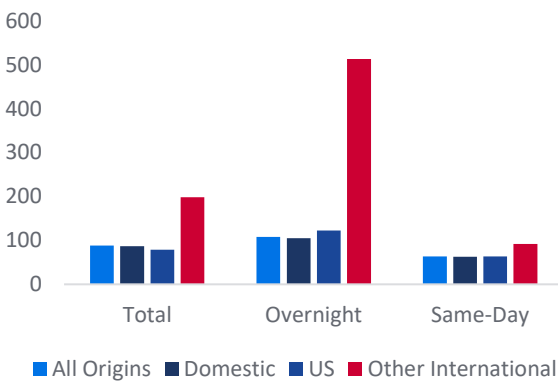
Sources: Signal49 Research; Environics Analytics; Moneris.



Overseas tourists spent the most per visit by a large margin

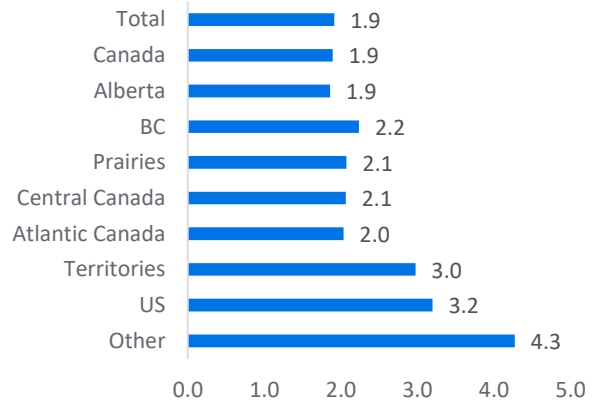
International visitors outspent their domestic counterparts per visit, largely because their average length of stay was twice as long (4.3 nights) compared to domestic travelers (1.9 nights), (See Chart 36.). Interestingly, overnight U.S. visitors spent only slightly more per trip than domestic visitors despite staying a day longer per visit. (See Chart 37.)

Chart 36
Spending by international overnight visitors a major factor in the region
(Spending per trip, 2024 Canadian dollars)



Sources: Signal49 Research; Environics Analytics; Moneris.

Chart 37
International visitors stay twice as long per visit
(nights stayed per overnight visit)

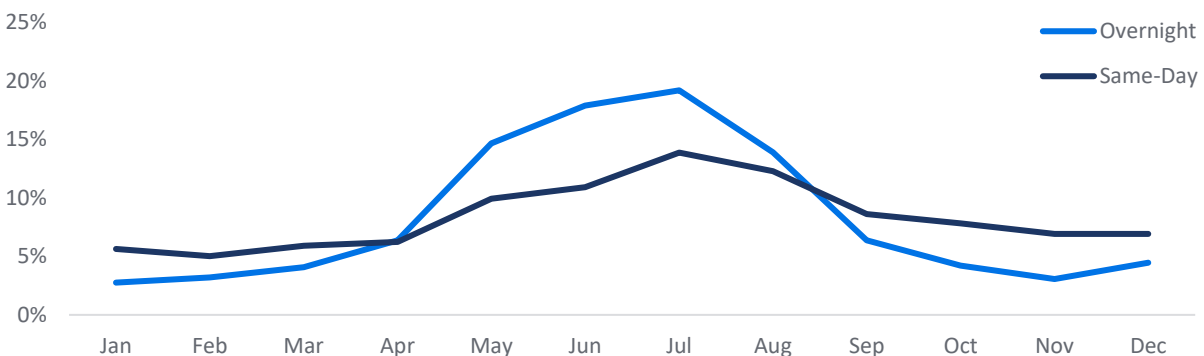


Sources: Signal49 Research; Environics Analytics; Moneris.

Lacombe County is primarily a summer spot for overnight tourists

Overnight tourism to Lacombe is highly seasonal with nearly five times as many overnight visits occurring during the summer. Same-day tourism shows a flatter seasonal pattern, though its 37 per cent summer share is more than double the winter volume, highlighting summer's importance for Lacombe County's tourism. (See Chart 38.)

Chart 38
Lacombe County same-day tourism is less seasonal than overnight.
(Share of annual visits, by month)



Sources: Signal49 Research; Environics Analytics.



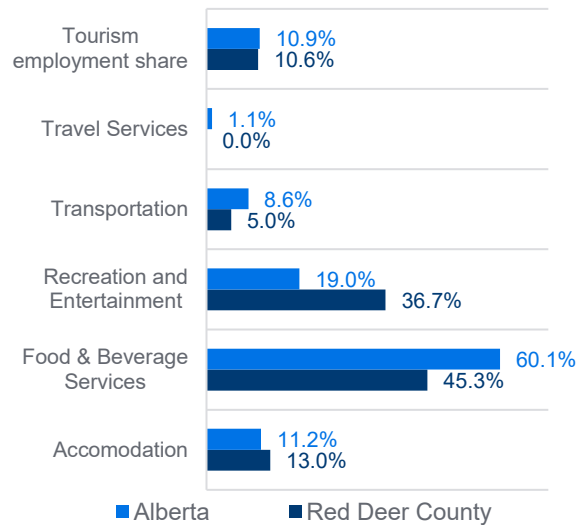
Red Deer County

Red Deer County¹⁶ is a large area in Central Alberta that surrounds the city of Red Deer and several smaller towns, offering a diverse range of features and attractions. Its population (excluding the City of Red Deer) was 19,933 as of 2021, with a median household income of \$94,000 per year, roughly equal to the Alberta-wide income level.

Food and beverage businesses are the region’s main area of tourism employment (45 per cent), but this is well below the provincial share of 60 per cent. Conversely, recreation and entertainment businesses account for 37 per cent of tourism employment in the region compared to just 19 per cent for the province.¹⁷ (See Chart 39.)

Chart 39

The recreation and entertainment business is relatively big in the Red Deer County (per cent of employment amongst privately operated businesses)



Sources: Signal49 Research; Statistics Canada.

Red Deer County tourism generated nearly \$100 million in GDP in 2024

Tourism activity in Red Deer County generated \$99 million in GDP in 2024, accounting for 11 per cent of the overall impact of tourism in the CATA regions of Central Alberta. (See Table 15.)

Tourism in the region also generated almost \$37 million in tax revenues. Of this amount, 62 per cent went to the federal government, while almost 26 per cent went to the provincial government. A further 2.5 per cent of tax revenues went to the local area, slightly below the 3 per cent share seen for the aggregated Central Alberta region. (See detailed data tables in Appendix E.)

¹⁶ Note that data for the City of Red Deer and Innisfail, though located within Red Deer County, are excluded and evaluated separately in this study.

¹⁷ Significant tourism supporting infrastructure may be provided by the local municipal government and, as such, would not be considered part of employment in the tourism industry.



Table 15

Tourism in Red Deer County added \$99 million to Canadian GDP in 2024
(Total economic impact, 2024 Canadian dollars, thousands)

	Red Deer County	Alberta, total	Canada, total
GDP (\$ thousands)	\$51,135	\$78,896	\$98,841
Income (\$ thousands)	\$29,668	\$44,870	\$56,435
Employment (jobs)	532	688	832

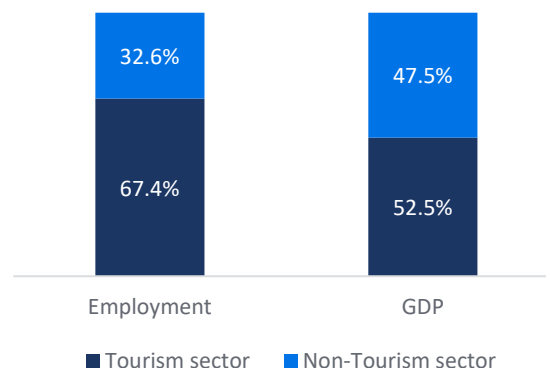
Source: Signal49 Research.

Tourism supported 532 jobs in Red Deer County, representing 4.8 per cent of total employment in the area. (See Table 15.) Just over 67 per cent of those jobs were directly in the tourism sector while 33 per cent were outside the tourism sector (See Chart 40.)

GDP impacts from tourism in Red Deer County were fairly balanced with 53 per cent of the GDP impacts of tourism to the region coming from the sector itself while just under 48 per cent comes from businesses in other sectors of the region's economy.

Chart 40

Tourism supported over 532 jobs in Red Deer County
(jobs supported, GDP generated)



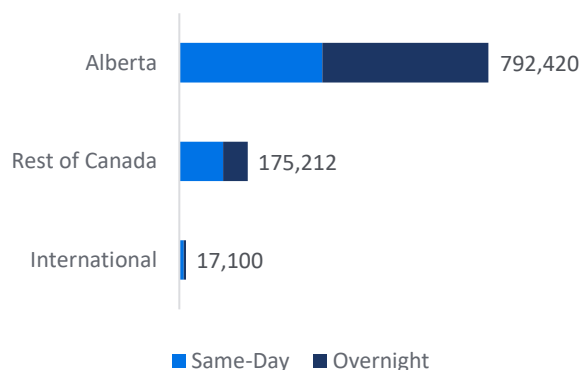
Source: Signal49 Research.

Red Deer County tourism balanced between same-day and overnight visits

Red Deer County welcomed 489,704 same-day visitors, and 495,027 overnight visitors who stayed a total of 809,140 nights. (See Chart 41.) Domestic tourists were dominant, comprising 98 per cent of same-day visits and 99 per cent of overnight visits. While Albertans' share of day visits (75 per cent) was smaller than for Central Alberta, their overnight share was larger at 86 per cent (82 per cent of nights). American visitors, accounted for 1.6 per cent of same-day and just 0.8 per cent of overnight visits while other international tourists accounted for 0.8 per cent of same-day and 0.4 per cent of overnight visits to the region.

Chart 41

Same-day and overnight tourism seen to be more balanced in Red Deer County



Sources: Signal49 Research; Environics Analytics.

Tourists spent nearly \$113 million in Red Deer County

Tourists spent nearly \$113 million in Red Deer County in 2024. Overnight visitors accounted for 70.4 per cent of this total. Over 97 per cent of overnighting tourist spending and same-day tourist spending came from Canadian travelers. Accommodation (27 per cent), vehicle operation (25 per cent) and food and beverage (27 per cent) were the main areas of overnight tourist spending. Same-day travelers to Red Deer County spent mostly on food and beverage (36 per cent) and vehicle operation (36 per cent). (See Table 16.)

Table 16:

Red Deer County benefits from important Accommodation spending by overnight travelers
(Tourism spending, 2024 Canadian dollars, thousands; per cent of total)

	Total	Overnight	Same-Day
Total	\$112,724	\$79,376	\$33,348
Accommodation	\$21,461	27.0%	n/a
Vehicle Rental	\$795	0.7%	0.6%
Vehicle Operation*	\$31,751	25.1%	35.6%
Commercial Transportation	\$315	0.3%	0.1%
Local Transportation**	\$621	0.7%	0.2%
Food and Beverage	\$33,259	26.8%	35.9%
Recreation & Entertainment	\$8,191	7.5%	6.8%
Clothing	\$6,277	4.9%	7.2%
Other expenditures	\$10,055	7.0%	13.6%

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.



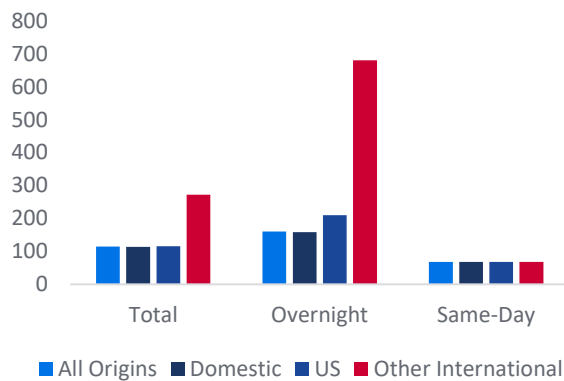
Overseas tourists stay longer, spend more

Overseas visitors spent significantly more per trip than U.S. or domestic visitors, driven by their longer average stay (4.3 nights) compared to U.S. (2.8 nights) and domestic (1.6 nights) travelers. (See Chart 42.) Notably, the 4.3-night average for overseas travelers in Red Deer County was well below the Central Alberta average of 6.1 nights. (See Chart 43.)

Chart 42

Average spending per trip by traveler origin

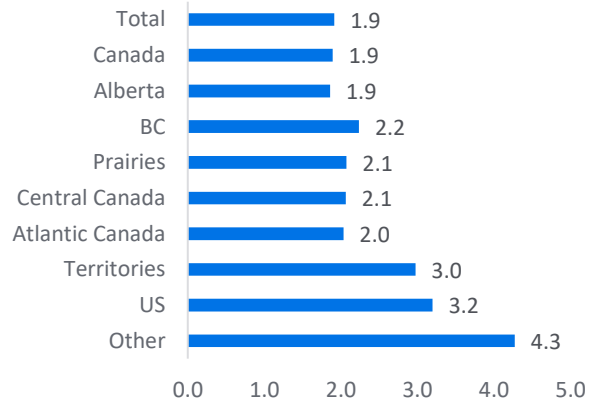
(Spending per trip, 2024 Canadian dollars)



Sources: Signal49 Research; Environics Analytics; Moneris.

Chart 43

International visitors to Red Deer stay longer than any other traveler group (nights stayed per overnight visit)



Sources: Signal49 Research; Environics Analytics; Moneris.

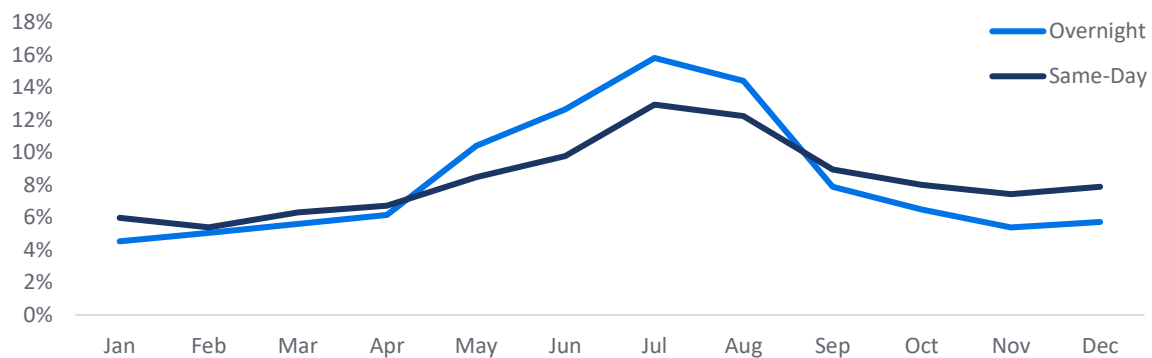
Nearly one third of all tourism activity during the summer

Red Deer County's tourism is concentrated in the summer, which is the peak for overnight travel at 39 per cent of annual visits, while winter is the quietest at 15 per cent. Same-day tourism shows less seasonal variation, likely due to the region's diverse amenities. Summer accounts for 32 per cent of same-day visits, while winter sees 19 per cent. (See Chart 44.)

Chart 44

Red Deer County tourism peaks in the summer

(Share of annual visits, by month)



Sources: Signal49 Research; Environics Analytics.



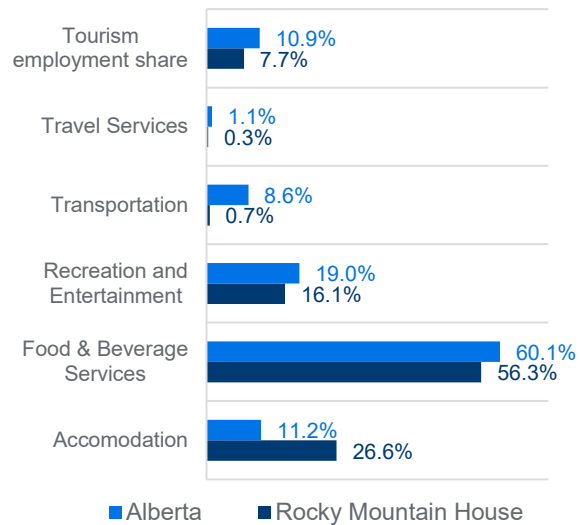
Rocky Mountain House

Rocky Mountain House, located in Clearwater County west of Red Deer, has a rich history as a former fur-trading outpost between the Clearwater and North Saskatchewan Rivers. Key attractions in the region include campgrounds and nature trails. The region has a population of 6,518 and a median household income of \$82,000 per year.

The Rocky Mountain House tourism sector accounts for noticeably less employment (8 per cent) than seen Alberta wide (11 per cent). Food and beverage businesses are the region’s main area of tourism employment (56 per cent), slightly below their provincial share of just over 60 per cent. Accommodation businesses also play a major role, accounting for 27 per cent of tourism employment in the region, more than double the share seen for the province.¹⁸ (See Chart 45.)

Chart 45

Food and beverage businesses biggest player in tourism sector (per cent of employment amongst privately operated businesses)



Sources: Signal49 Research; Statistics Canada.

Rocky Mountain House tourism generated \$42 million to GDP

Tourism in Rocky Mountain House generated nearly \$42 million in GDP in 2024 which is 4.6 per cent of the total GDP impact of the sector in Central Alberta. (See Table 17.)

Tourism to the region also generated approximately \$16 million in taxes, of which 62 per cent is allocated to the federal government, while 25 per cent goes to the Government of Alberta. The municipality of Rocky Mountain House received 2.3 per cent of the tourism-generated tax revenue. (See detailed data tables in Appendix E.)

¹⁸ Significant tourism supporting infrastructure may be provided by the local municipal government and,

as such, would not be considered part of employment in the tourism industry.



Table 17

Rocky Mountain House tourism added \$42 million to Canadian GDP in 2024
(Total economic impact, 2024 Canadian dollars, thousands)

	Rocky Mountain House	Alberta, total	Canada, total
GDP (\$ thousands)	\$20,437	\$33,227	\$41,944
Income (\$ thousands)	\$11,831	\$18,815	\$23,850
Employment (jobs)	223	294	357

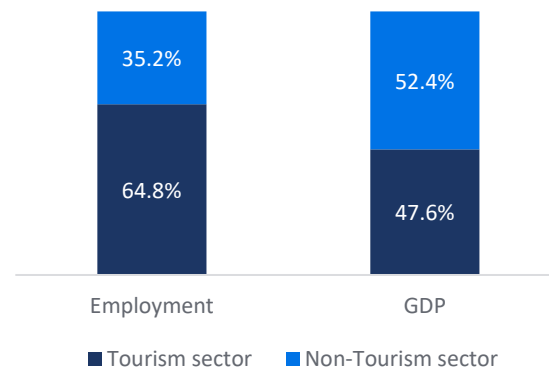
Source: Signal49 Research.

Tourism supported 223 jobs in Rocky Mountain House, or about 7 per cent of the region’s total employment. (See Table 17.) Almost 65 per cent of those jobs were directly in the tourism sector while 35 per cent were outside the tourism sector.

GDP impacts from tourism in Rocky Mountain House were balanced, with 48 per cent of the GDP impacts of tourism to the region coming from the sector itself while just over 52 per cent comes from businesses in other sectors of the region’s economy. (See Chart 46.)

Chart 46

The economic impact split resembles that of the broader Central Alberta region (jobs supported, GDP generated)



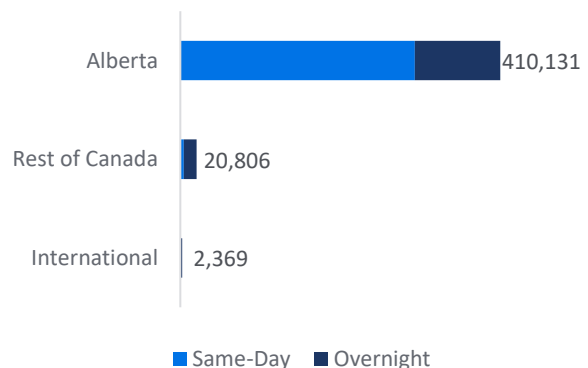
Source: Signal49 Research.

Overnight tourism to Rocky Mountain House is mostly other Albertans

Rocky Mountain House welcomed 305,424 same-day visitors, and 127,882 overnight visitors who stayed a total of 249,200 nights. (See Chart 47.) Most travelers to Rocky Mountain House were Canadian-based including 99.9 per cent of all same-day visits, and 98.4 per cent of all overnight visits. Albertans were responsible for the majority of travel to the region with 98 per cent of same-day visits and 86 per cent of overnight visits and 83 per cent of nights stayed coming from Alberta-based travelers. American visitors and overseas visitors were largely absent from the mix in 2024, accounting for less than 1 per cent of visits and less than 1.5 per cent of nights stayed.

Chart 47

Same-day visits to Rocky Mountain House almost triple overnight visits



Sources: Signal49 Research; Environics Analytics.

Tourism spending is balanced between same-day and overnight travelers

Tourists spent roughly \$49 million in Rocky Mountain House in 2024, split fairly evenly between overnight visitors (47 per cent) and same-day travelers (54 per cent). Canadian travelers accounted for 95.5 per cent of overnighting tourist spending, and virtually all (99.9 per cent) of same-day tourist spending. Overnight tourists spending was evenly apportioned across accommodation (27 per cent) and vehicle operation (25 per cent) and food and beverage (27 per cent), a pattern seen for much of the CATA region. (See Table 18.)

Table 18

Rocky Mountain House among the few regions seeing relatively higher same-day spending (Tourism spending, 2024 Canadian dollars, thousands; per cent of total)

	Total	Overnight	Same-Day
Total	\$49,178	\$22,844	\$26,334
Accommodation	\$6,237	27.3%	n/a
Vehicle Rental	\$421	1.1%	0.6%
Vehicle Operation*	\$15,034	24.8%	35.6%
Commercial Transportation	\$109	0.3%	0.1%
Local Transportation**	\$211	0.7%	0.2%
Food and Beverage	\$15,532	26.6%	35.9%
Recreation & entertainment	\$3,483	7.4%	6.8%
Clothing	\$2,996	4.9%	7.2%
Other expenditures	\$5,157	6.9%	13.6%

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.

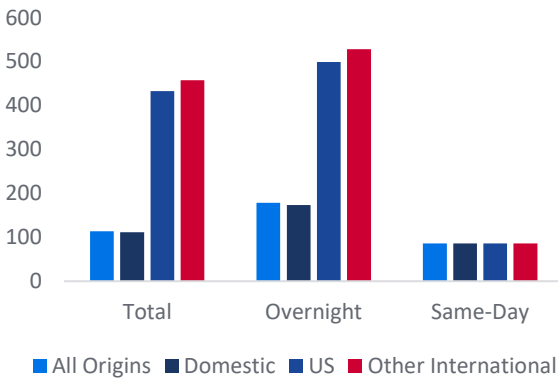


Overnight tourists still spent the most per visit by a large margin

On a per-trip basis, U.S. and international visitors spent more than their domestic counterparts. (See Chart 48.) These two groups had similar average lengths of stay of 3 nights and 3.6 nights respectively. (See Chart 49.) Domestic travelers to Rocky Mountain House stayed fewer nights (1.9 nights), cutting into the per trip revenues seen from this group.

Chart 48

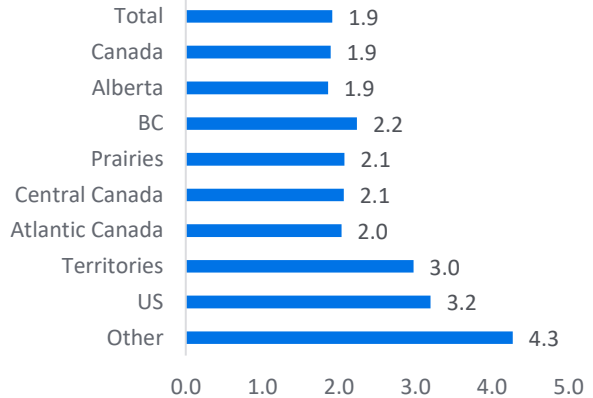
American and overseas travelers spending similar amounts per trip (Spending per trip, 2024 Canadian dollars)



Sources: Signal49 Research; Environics Analytics; Moneris.

Chart 49

Domestic travelers stay fewer nights in the region (nights stayed per overnight visit)



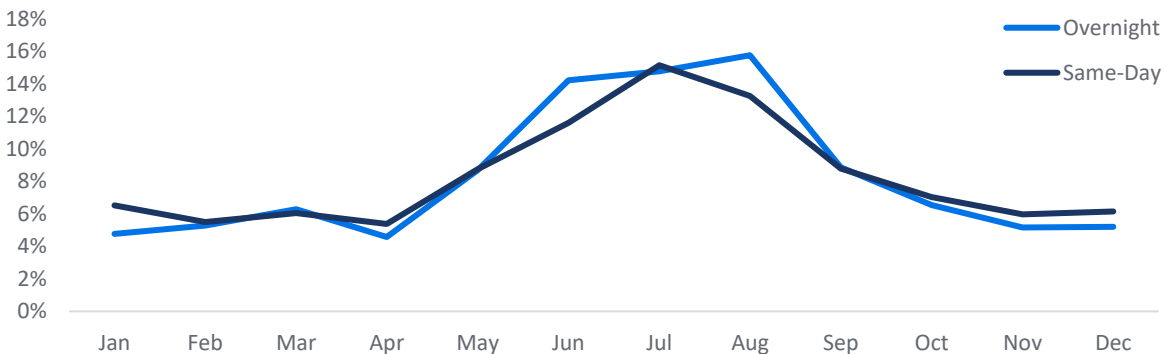
Sources: Signal49 Research; Environics Analytics; Moneris.

Rocky Mountain House tourism swells in the summer

Tourism in Rocky Mountain House follows the trend of the broad Central Alberta region of being strongly summer peaking. (See Chart 50.) Tourism swells in the summer drawn in by the region's outdoor activities and key attractions like the Rocky Mountain House National Historic Site.

Chart 50

Tourism to Rocky Mountain House swells in the summer (Share of annual visits, by month)



Sources: Signal49 Research; Environics Analytics.



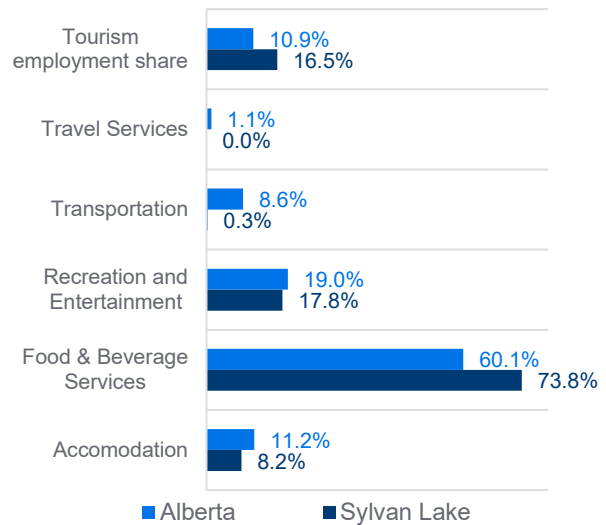
Sylvan Lake

Sylvan Lake is roughly 20 kilometres West of the City of Red Deer. Its main tourist attraction is its eponymous lake with its waterfront, beaches and walking trails. Sylvan Lake has a population of 16,142 and a median household income of \$93,000.

The Sylvan Lake tourism sector accounts for considerably more employment (17 per cent) than seen Alberta wide (11 per cent).¹⁹ Food and beverage businesses are the region’s main area of tourism employment (74 per cent), well above their provincial share of just over 60 per cent, likely driven by the large offering on Centennial Streer and Lakeshore Drive. (See Chart 51.)

Chart 51

Food and beverage businesses major players in the Sylvan Lake tourism sector (per cent of employment amongst privately operated businesses)



Sources: Signal49 Research; Statistics Canada.

Sylvan Lake tourism added \$59 million to GDP in 2024

Tourism activity in Sylvan Lake added \$59 million to Canada’s GDP in 2024. This equates to an estimated 6.5 per cent of the total economic impact of tourism the Central Alberta regions in this study. (See Table 19.)

Tourism generated approximately \$22 million in total tax revenues. Of this amount, 62 per cent is directed to the federal government, while 26 per cent went to the Government of Alberta. Municipalities across the province received 4.7 per cent of the tourism-related tax revenue, and 2.5 per cent—roughly \$555,000—was allocated directly to the municipality of Sylvan Lake. (See detailed data tables in Appendix E.)

¹⁹ Significant tourism supporting infrastructure may be provided by the local municipal government and,

as such, would not considered part of employment in the tourism industry.



Table 19

Sylvan Lake tourism added \$59 million to Canadian GDP in 2024

(Total economic impact, 2024 Canadian dollars, thousands)

	Sylvan Lake	Alberta, total	Canada, total
GDP (\$ thousands)	\$30,360	\$47,060	\$58,980
Income (\$ thousands)	\$17,607	\$26,727	\$33,637
Employment (jobs)	316	410	496

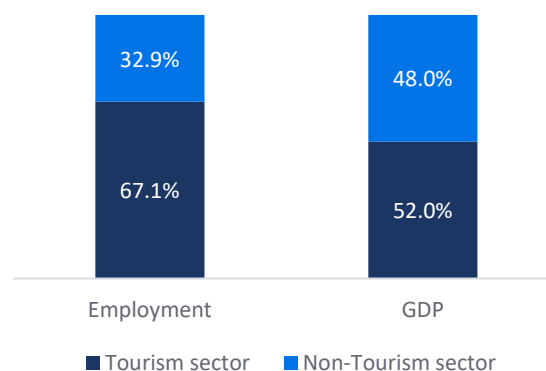
Source: Signal49 Research.

Tourism in Sylvan Lake supported a significant portion of region’s employment, with 316 jobs (4 per cent) tied to the spending tourism generated locally. (See Table 19.) Almost 67 per cent of those jobs were directly in the tourism sector while 33 per cent were outside the tourism sector.

The GDP impacts from tourism in Sylvan Lake were balanced, with 52 per cent of the GDP impacts coming from the sector itself, while 48 per cent came from businesses in other sectors of the region’s economy. (See Chart 52.)

Chart 52

Jobs impacts in Sylvan Lake relatively more concentrated in the tourism sector (jobs supported, GDP generated)



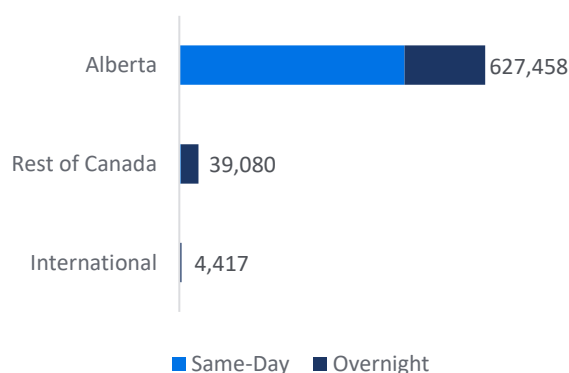
Source: Signal49 Research.

International visitors spent almost 5 nights per trip at Sylvan Lake

Sylvan Lake welcomed 465,256 same-day visitors and 205,699 overnight visitors who stayed a total of 430,277 nights. (See Chart 53.) Canadian tourists were dominant (99.9 per cent day, 98 per cent overnight), with Albertans comprising the vast majority: 99 per cent of same-day visits, 81 per cent of overnight visits, and 71 per cent of nights. American and overseas based visitors were largely absent from the same-day travelers but were more of a factor in the overnight visits with 2.6 per cent of nights stayed coming from U.S. travelers and a further 1.8 per cent from overseas travelers. This is roughly equal to levels seen for Central Alberta.

Chart 53

Virtually all same-day visitors originated within the province



Sources: Signal49 Research; Environics Analytics.

Tourism spending was over \$67 million

Tourists to Sylvan Lake spent an estimated \$67.4 million in 2024, the majority of which came from overnight visitors (65 per cent). Spending by same-day travelers accounted for the remaining 35 per cent, noticeably above the level seen for the overall CATA region. Canadian travelers led tourism spending in Sylvan Lake accounting for 96 per cent of overnighting tourist spending, and 99.8 per cent of same-day tourist spending. Overnight tourist spending was evenly apportioned across accommodation (26 per cent) and vehicle operation (26 per cent) and food and beverage (26 per cent). (See Table 20.)

Table 20

Overnight travelers drive the overall tourism spending picture in Sylvan Lake
(Tourism spending, 2024 Canadian dollars, thousands; per cent of total)

	Total	Overnight	Same-Day
Total	\$67,414	\$43,747	\$23,667
Accommodation	\$12,444	28.4%	n/a
Vehicle Rental	\$665	1.2%	0.6%
Vehicle Operation*	\$19,099	24.4%	35.6%
Commercial Transportation	\$174	0.3%	0.1%
Local Transportation**	\$341	0.7%	0.2%
Food and Beverage	\$19,986	26.3%	35.9%
Recreation & Entertainment	\$4,786	7.3%	6.8%
Clothing	\$3,767	4.7%	7.2%
Other expenditures	\$6,154	6.7%	13.6%

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.



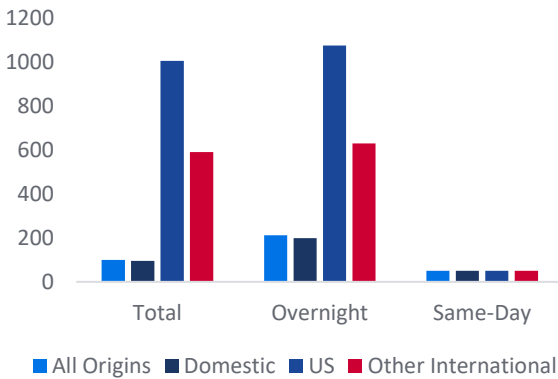
American tourists to Sylvan Lake out spent other groups on a per visit basis

On a per-trip basis, international visitors spent considerably more than their domestic counterparts. (See Chart 54.) An expected result given that domestic overnight tourist stayed an average of 2.1 nights per trip while U.S. visitors stayed an average 4.7 nights and overseas visitors stayed an average of over 6 nights per visit. (See Chart 55.)

Chart 54

American visitors spent over \$1,000 per visit

(Spending per trip, 2024 Canadian dollars)

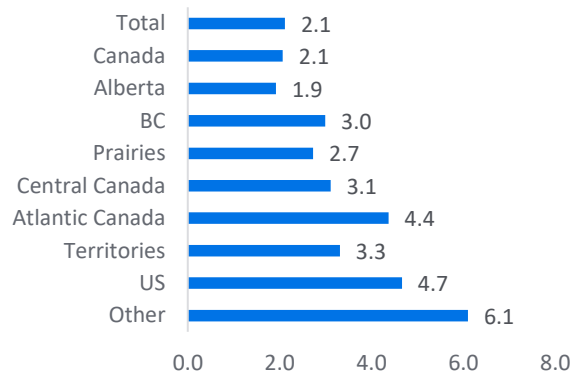


Sources: Signal49 Research; Environics Analytics; Moneris.

Chart 55

Overnight stays by U.S. travelers important to the region's tourism picture

(nights stayed per overnight visit)



Sources: Signal49 Research; Environics Analytics; Moneris.

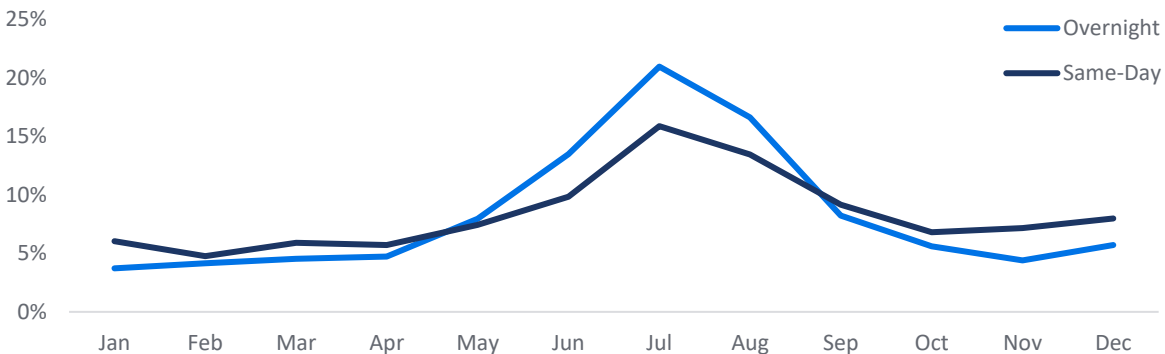
Summertime travelers dominate Sylvan Lake tourism

Driven by its lake-based attractions, Sylvan Lake's tourism has a pronounced summer peak. Overnight tourism is highly concentrated: July alone (21 per cent) drew more visitors than the entire spring (17 per cent), fall (18 per cent), or winter (14 per cent) seasons, with summer accounting for over half of all overnight trips. Same-day tourism is similarly seasonal, spiking in summer before dropping off sharply. (See Chart 56.)

Chart 56

Sylvan Lake is a decidedly summertime tourist destination

(Share of annual visits, by month)



Sources: Signal49 Research; Environics Analytics.



Looking Ahead for Central Alberta Tourism

Tourism across Central Alberta's regions has several overarching characteristics, the most prominent being that it is largely a summer tourism destination. Albertans and other Canadians make up the bulk of visitors, and overnight visitors generate an outsized share of economic value. These common features suggest strategic priorities for increasing the economic impacts of local tourism in Central Alberta:

- Focus on increasing off-season and/or winter usage of amenities and accommodations through business events to maximize year-round impacts
- Ensure overnight guests have a variety of accommodation options to help attract visitors with differing spending ranges
- To the extent possible, focus on the attraction of international visitors who tend to spend more and stay longer in the region.

Central Alberta has many strengths in the tourism space that can be built upon to have an even greater economic impact in the years to come.

Appendix



Appendix A: Discussion of our new micro-data driven EIA approach

This project employed an innovative methodology to estimate visitor activity and expenditures in Central Alberta and eight participating tourism regions. The approach integrates mobile device movement data from Environics Analytics with point-of-sale transactional data from Moneris, offering a more granular and timely alternative to traditional survey-based methods.

Motivation for innovation

Small tourism regions often rely on Statistics Canada's National Tourism Survey (NTS) and International Visitor Survey (IVS) for tourism insights. However, these surveys present several limitations that hinder their effectiveness for local decision-making:

1. Geographic granularity

- *Issue:* NTS and IVS are designed for national and provincial estimates.
- *Impact:* Data for small regions is suppressed, obscuring local trends.

2. Sample size and reliability

- *Issue:* Limited representation of small regions in national surveys.
- *Impact:* High margins of error and unstable year-over-year comparisons.

3. Seasonal and event-specific tourism

- *Issue:* Surveys may miss short-term spikes from festivals or other seasonal attractions.
- *Impact:* Underrepresentation of true visitor volumes and economic impact.

4. International visitor data limitations

- *Issue:* IVS focuses on border crossings and airport arrivals.
- *Impact:* Smaller regions may not be accurately reflected in international visitation data.

5. Lack of real-time insights



- *Issue:* Data release lags behind real-world changes.
- *Impact:* Delays in responding to emerging trends or disruptions.

6. Survey design and definitions

- *Issue:* Definitions may not align with local tourism realities.
- *Impact:* Rural and Indigenous experiences may be underrepresented or misclassified.

Methodological approach

To overcome these limitations, the project used mobile activity data and transactional expenditure data on a per-person, per-trip basis. This method allowed for:

- Estimation of visitor volumes based on anonymized device movement patterns.
- Estimation of visitor spending through aggregated point-of-sale transactions.
- Alignment of activity and expenditure data to produce region-specific insights.

This enhances the accuracy and relevance of tourism metrics, enabling better planning, investment decisions, and performance tracking at the local level.

Considerations and limitations

While this approach addresses many of the shortcomings of traditional surveys, it introduces new considerations:

- **Privacy and ethics:** All data used is anonymized and aggregated, but ethical use remains paramount.
- **Coverage bias:** Not all visitors carry mobile devices or use card-based payments.
- **Attribution challenges:** Distinguishing tourist activity from routine activity requires careful calibration.

Despite these challenges, the integration of mobile and transactional data represents a significant step forward in enabling data-driven tourism strategies for sub-provincial regions.



Appendix B: Detailed methodology

Estimating Visitor Figures

Overnight Visits (2024)

The figures for unique overnight visitors, overnight visits and nights stayed were provided by Environics VisitorView product.²⁰ According to Environics, “VisitorView also features refined tourism filters to reduce noise from non-tourism movement and redefined trip length thresholds to better identify tourist activity.” VisitorView was customized for this project according to the specific geographic boundaries associated with each Central Alberta Tourism Alliance (CATA) region participating in the study as well as the broader Central Alberta region defined as Census Division 08 and 09.

Same-Day Visits - Intraprovincial (2024)

Environics VisitorView does not provide estimates for same-day travel. Instead, we use MobileScapes²¹ data which tracks all movements with a region. This dataset is not tailored to tourist activity identification. We therefore developed our own process to do so.

To isolate same-day visitor activity from routine transit activity, a two-step treatment approach was applied to the raw mobile mobility data provided by Environics MobileScapes:

Poisson-based estimation of tourism-related travel

Objective: Isolate tourism-related travel from regular interregional traffic based on mobile movement activity.

Approach:

- Applied a bimodal Poisson distribution to isolate and estimate the share of Alberta visitors making **six or fewer trips per year** to each region.
- This threshold was selected to represent infrequent travelers, who are more likely to be tourists than regular commuters.
- The model assumes trip frequency follows a statistical distribution, enabling segmentation of likely tourists.
- Validation against Statistics Canada data for Central Alberta (aligned with CD 08 & 09) showed good—if conservative—alignment.
- Based on this validation, the approach was extended to all CATA regions.

Note: Further refinement of these estimates using regional economic benchmarks (e.g., tourism-related vehicle operating costs) is discussed in the Estimating Tourism Expenditures section of this appendix.

²⁰ <https://environicsanalytics.com/en-ca/data/behavioural/visitorview>

²¹ <https://environicsanalytics.com/en-ca/data/mobile-analytics/mobilescapes-envison>



Same-Day Visits - Interprovincial (2024)

To estimate the same-day travel from all provinces (excluding Alberta) to Central Alberta as well as the various regions participating in this study, we use the number of distinct people from the Environics MobileScapes database (mobile phone mobility data) and subtracted the number of distinct people from the Environics VisitorView database (overnight travellers) to estimate the number of distinct people that were not already included in the overnight database. The resulting residual figures were then multiplied by the average number of overnight trips from visitors from that same province (a conservative assumption). If the results were implausible (e.g., due to instances where the number of distinct people from the Environics VisitorView database were higher than that reported from the Environics MobileScapes database), we applied a 10 per cent rule on the Environics MobileScapes database figure.

International Same-Day Visits

Since MobileScapes excludes international origins, we used Ontario's overnight-to-same-day ratio to estimate international same-day visits for both visitors from the U.S. and visitors from other international countries.

Estimating Tourism Expenditures

Data Challenges: Moneris' transactional data presented the following challenges:

- Varying coverage ratios by region and category (5–75 per cent).
- The data was based on select postal codes in a region rather than entire CSD or CD coverage
- Due to a limited number of transactions, the data for Lacombe County produced unusually high average expenditure values, rendering it unreliable for direct analysis and therefore excluded it from use.

Approach to resolve challenges:

- Central Alberta (CD 08 & 09) was selected as the benchmark for average travel expenditures due to its comprehensive and robust sample of transactions across a wide range of expenditure categories.
- Scaled the average of the overall CATA region's expenditures to match that of the larger CD 08 & 09 region, but allowed for regional variation.
- Based on economic similarities, adjusted Lacombe County's distribution of travel expenditures to align with Red Deer County. However, due to the very specific nature of the tourism sector in Lacombe County, per traveller costs for accommodation and food and beverage were reduced 50 per cent. The adjustment was made to account for lower average accommodation costs of camping versus traditional hotels and motels as well as the very limited options for restaurants in the area.



Adjustments Made:

- Estimated the gaps in Moneris data coverage by comparing average transaction value of each expenditure category against the average expenditure reported per cardholder.
- For Alberta residents' overnight spending, we used BC's profile scaled to 90% (to reflect shorter stays).
- For same-day spending, used Alberta's average spending profile but scaled down (by a factor of 2–3) and excluded categories like accommodation.
- Compared same-day spending profiles to Statistics Canada data for Central Alberta, Red Deer and Sylvan Lake.

The following represents the additional process used to refine same-day visit estimates based on regional economic benchmarks (e.g., tourism-related vehicle operating costs).

Fine-tuning same-day estimates based on gasoline expenditures (vehicle operating costs) incurred by tourists at the local level

Objective: Refine regional estimates to align with local tourism benchmarks.

Approach:

- Start with known 2024 vehicle operating costs for tourists in Alberta:
 - Domestic: \$1.3 billion
 - International (estimated): \$215 million
 - **Total:** \$1.515 billion
- Use the 2019 Provincial-Territorial Satellite Account (PTSA) to establish that **19.5 per cent** of total gas station sales are attributed to tourists.
- Benchmark using Central Alberta data:
 - Central Alberta accounts for **21 per cent** of provincial vehicle operating costs (based on domestic NTS data).
 - It also accounts for **8.9 per cent** of provincial gas station employment (2021 Census).
- This yields a benchmark ratio of vehicle operating costs to employment share:
$$\text{Ratio} = \frac{21\%}{8.9\%} \approx 2.36$$
- Apply this ratio to the 8 CATA regions:
 - Estimate each region's share of provincial vehicle operating costs based on local gas station employment.
 - This provides a **target value** for tourism-related vehicle operating costs in each region.
- Fine-tune the Poisson-based same-day travel estimates:
 - Adjust initial same-day estimates so that tourism-related vehicle operating costs (from combined same-day + overnight travel) align with target values.
 - This ensures consistency with broader economic data and aligns with the satellite accounting framework.



Final Calculation:

- Total expenditures = (average spend per visitor) × (number of visits), for both overnight and same-day trips.

Adjusted for overlap: if a visitor stayed in multiple CATA regions, we corrected to avoid overestimation of trip spending.



Appendix C: Overview of our EIA model

Our proprietary Economic Impact Assessment model (EIA) is an Input/Output model that can assess the impact of any event, activity, project or policy on GDP, employment, income, and the fiscal impacts of any related economic activity at the local, provincial, and national levels. The model estimates and reports the direct, indirect, and induced impacts.

Direct impact estimates capture the economic value-add from purchasing goods and services needed for the event, activity, project or policy. *Indirect impact* estimates measure the value-added for those firms selling goods and services as intermediate inputs for the main activity. *Induced impacts* account for the knock-on effects of employees spending their earnings and owners spend profits on other areas of the economy.

These three dimensions of economic impact are used to estimate the overall increases/decreases to:

- Gross Domestic Product (GDP)
- Employment
- Personal income, and
- Tax revenues (federal, provincial and municipal levels)

The EIA can also be customized to calculate results for over 300 sub-provincial regions, and estimate job creation and output indicators for 236 industries. Accordingly, our analysis can be customized for a range of use cases, including:

- Footprint analyses
- Investment outcomes
- Operational effects, and
- Economic multipliers



Appendix D: Glossary

Tourism Sector - The tourism sector is defined by five core industries:

- Transportation
- Recreation and entertainment
- Accommodation
- Food services
- Travel services

Businesses operating within these industries derive a portion of their revenue from tourism-related activity. However, we note that they may also serve local residents and generate income from non-tourism sources.

Tourism Activity – Tourism activity refers to the movement and spending of individuals who travel outside their usual place of residence. This includes both same-day visits and those visits that extend overnight in a destination. The spending associated with these visits is

Visitor - An individual who travels to a destination outside their usual environment for less than a year, for any main purpose (business, leisure, etc.). One visitor can make multiple visits during a trip and can take multiple trips per year.

Unique Visitor – refers to the unduplicated number of visitors engaging with a destination over the course of a year. This is a key metric available from Environics Analytics in its VisitorView product line focusing on overnight travel activity. Unfortunately, the number of unique visitors is not available in our analysis of same-day travel activity due to data challenges (see appendix B).

Visit: A single instance of a visitor engaging with a destination. One visitor can make multiple visits during a trip.

Visits: The total number of visitors engaging with a destination during a period of time.

Overnight visit: A single instance of a visitor engaging with a destination that includes an overnight stay in the destination.

Same-day visit: A single instance of a visitor engaging with a destination for only part of a day (not overnight).

Trip: A journey by a visitor that may include multiple destinations and therefore multiple visits. Typically, a trip involves a single origin and destination.

Trips: The total number of full journeys (trips) made by visitors.

Nights: The number of nights attached to overnight visits in a region. Dividing nights by visits allows for a calculation of the average number of nights spent during each visit in a region.

Tourism expenditures: Includes expenditures made during a visit in a region.



The economic impact of tourism expenditures reflects the broader benefits of tourism activity. These include contributions to local employment, labour income, GDP, and government tax revenues, highlighting tourism's role as a key driver of economic development in communities across Canada.

Economic impact terms

Gross Domestic Product (GDP) – is the most common form of representing net (or unduplicated) economic activity in an economy. In its more basic form, it primarily consists of labour income and profits but also includes adjustments for unincorporated business income, taxes on production and subsidies.

Employment – is reported as person-years of employment. In any one year, a person-year of employment can represent an equivalent full-year position that is either full-time or part-time but for the duration of a full-year. Meanwhile, seasonal or contract work only counts for the portion of the year that the position is filled.

Labour income – related to the combined wages, salaries and benefits associated with the corresponding levels of employment.

Taxation – relates to the contribution towards tax Revenue at the federal, provincial, and municipal levels (NOTE: tax revenue includes personal income taxes, social security contributions, payroll taxes, excise and import duties, municipal property taxes, corporate taxes, and sales taxes).



Appendix E: Detailed Data Tables

Table E.1

Central Alberta — tourist visits

	Same-day visits	Unique overnight visitors	Overnight visits	Nights stayed
Total	4,236,602	1,500,818	2,681,869	5,681,866
Canada	4,199,154	1,461,868	2,638,754	5,457,978
Alberta	3,833,648	1,161,359	2,274,463	4,374,105
BC	195,206	152,735	185,086	553,869
Prairies	101,088	84,109	109,088	297,999
Central Canada	60,783	49,813	54,583	169,757
Atlantic Canada	3,996	8,911	9,642	42,144
Territories	4,432	3,080	3,708	12,283
United States	23,966	24,610	27,241	127,036
Other international	13,482	14,341	15,874	96,852

Sources: Signal49 Research; Environics Analytics.

Table E.2

Central Alberta — tourism spending
(2024 Canadian dollars, millions)

	Total spending	Overnight	Same-day
Total	\$1,026.4	\$731.8	\$294.6
Accommodation	\$193.3	\$193.3	n/a
Vehicle rental	\$14.4	\$12.5	\$1.9
Vehicle operation	\$293.2	\$187.1	\$106.1
Commercial transportation	\$2.9	\$2.5	\$0.3
Local transportation	\$5.7	\$5.0	\$0.6
Food and beverage, in restaurants and bars	\$153.7	\$104.0	\$49.7
Food and beverage, in stores during trip	\$141.9	\$86.7	\$55.2
Recreation and entertainment	\$73.9	\$53.9	\$20.0
Clothing	\$56.9	\$35.9	\$21.0
Other expenditures	\$90.7	\$50.8	\$39.9
Canada	\$995.1	\$701.1	\$294.0
United States	\$17.5	\$17.2	\$0.3
Other international	\$13.8	\$13.6	\$0.2

Sources: Signal49 Research; Environics Analytics; Moneris.



Table E.3
Blackfalds — tax revenue generation
(2024 Canadian dollars, thousands)

Total tax revenues impacts	\$8,872
Federal taxes	\$5,513
Provincial taxes - Alberta	\$2,233
Provincial taxes – Other provinces	\$578
Municipal taxes – local area	\$211
Municipal taxes – rest of Alberta	\$200
Municipal taxes – Other provinces	\$137

Source: Signal49 Research.

Table E.4
Blackfalds — tourist visits

	Same-day visits	Unique Overnight visitors	Overnight visits	Nights stayed
Total	275,939	48,369	65,693	137,556
Canada	272,409	46,910	64,145	129,495
Alberta	240,685	32,920	47,561	84,487
BC	17,322	6,703	7,994	22,673
Prairies	7,731	4,316	5,458	13,470
Central Canada	5,593	1,925	2,038	5,257
Atlantic Canada	450	799	821	2,757
Territories	628	136	151	440
United States	2,091	864	917	4,627
Other international	1,439	595	631	3,434

Sources: Signal49 Research; Environics Analytics.



Table E.5
Blackfalds — tourism spending
(2024 Canadian dollars, \$ thousands)

	Total spending	Overnight	Same-day
Total	\$27,193	\$11,647	\$15,546
Accommodation	\$3,240	\$3,240	n/a
Vehicle rental	\$438	\$341	\$97
Vehicle operation*	\$8,327	\$2,800	\$5,527
Commercial transportation	\$55	\$37	\$18
Local transportation**	\$106	\$74	\$32
Food and beverage, in restaurants and bars	\$4,337	\$1,681	\$2,656
Food and beverage, in stores during trip	\$4,242	\$1,314	\$2,928
Recreation and entertainment	\$1,881	\$821	\$1,060
Clothing	\$1,669	\$555	\$1,113
Other expenditures	\$2,899	\$784	\$2,115
Canada	\$25,778	\$10,430	\$15,347
United States	\$517	\$399	\$118
Other international	\$899	\$818	\$81

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.

Table E.6
Clearwater — tax revenues generated
(2024 Canadian dollars, thousands)

Total tax revenues impacts	\$19,762
Federal taxes	\$12,097
Provincial taxes - Alberta	\$5,129
Provincial taxes – Other provinces	\$1,276
Municipal taxes – local area	\$501
Municipal taxes – rest of Alberta	\$451
Municipal taxes – Other provinces	\$308

Source: Signal49 Research.



Table E.7
Clearwater — tourist visits

	Same-day visits	Unique overnight visitors	Overnight visits	Nights stayed
Total	140,840	257,098	396,117	850,893
Canada	140,794	252,849	391,760	837,056
Alberta	140,298	226,841	363,501	769,393
BC	244	11,070	12,246	31,253
Prairies	90	6,704	7,573	18,980
Central Canada	61	6,495	6,653	12,839
Atlantic Canada	14	1,331	1,346	3,314
Territories	86	260	289	840
United States	21	1,911	1,960	6,479
Other international	25	2,338	2,397	7,358

Sources: Signal49 Research; Environics Analytics.

Table E.8
Clearwater — tourism spending
(2024 Canadian dollars, \$ thousands)

	Total spending	Overnight	Same-day
Total	\$60,170	\$53,877	\$6,293
Accommodation	\$14,734	\$14,734	n/a
Vehicle rental	\$469	\$430	\$39
Vehicle operation*	\$15,649	\$13,412	\$2,237
Commercial transportation**	\$196	\$188	\$7
Local transportation	\$390	\$377	\$13
Food and beverage, in restaurants and bars	\$9,005	\$7,930	\$1,075
Food and beverage, in stores during trip	\$7,648	\$6,463	\$1,185
Recreation and entertainment	\$4,443	\$4,014	\$429
Clothing	\$3,067	\$2,616	\$451
Other expenditures	\$4,569	\$3,713	\$856
Canada	\$58,130	\$51,839	\$6,291
United States	\$1,182	\$1,181	\$1
Other international	\$858	\$857	\$1

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.



Table E.9
Red Deer — tax revenues generated
(2024 Canadian dollars, thousands)

Total tax revenues impacts	\$133,816
Federal taxes	\$82,362
Provincial taxes - Alberta	\$34,435
Provincial taxes – Other provinces	\$8,624
Municipal taxes – local area	\$3,827
Municipal taxes – rest of Alberta	\$2,496
Municipal taxes – Other provinces	\$2,072

Source: Signal49 Research.

Table E.10
Red Deer — tourist visits

	Same-day visits	Unique overnight visitors	Overnight visits	Nights stayed
Total	1,461,525	490,950	720,429	1,484,059
Canada	1,459,716	474,766	702,619	1,384,637
Alberta	1,446,948	346,387	552,497	971,479
BC	6,066	65,983	77,130	212,652
Prairies	4,160	36,255	44,407	116,475
Central Canada	2,153	20,430	22,262	61,558
Atlantic Canada	256	3,726	3,945	14,523
Territories	134	1,273	1,516	4,393
United States	1,211	10,837	11,926	57,903
Other international	598	5,347	5,884	41,519

Sources: Signal49 Research; Environics Analytics.



Table E.11
 Red Deer — tourism spending
 (2024 Canadian dollars, \$ thousands)

	Total spending	Overnight	Same-day
Total	\$407,192	\$306,445	\$100,746
Accommodation	\$83,522	\$83,522	n/a
Vehicle rental	\$3,035	\$2,404	\$630
Vehicle operation*	\$114,452	\$78,635	\$35,817
Commercial transportation**	\$1,042	\$927	\$116
Local transportation	\$2,059	\$1,853	\$206
Food and beverage, in restaurants and bars	\$62,691	\$45,476	\$17,215
Food and beverage, in stores during trip	\$54,382	\$35,408	\$18,975
Recreation and entertainment	\$28,928	\$22,061	\$6,866
Clothing	\$22,222	\$15,007	\$7,215
Other expenditures	\$34,859	\$21,152	\$13,707
Canada	\$396,179	\$295,558	\$100,622
United States	\$6,259	\$6,176	\$84
Other international	\$4,753	\$4,712	\$41

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.



Table E.12
 Innisfail — tax revenues generated
 (2024 Canadian dollars, thousands)

Total tax revenues impacts	\$11,667
Federal taxes	\$7,288
Provincial taxes - Alberta	\$2,910
Provincial taxes – Other provinces	\$763
Municipal taxes – local area	\$261
Municipal taxes – rest of Alberta	\$265
Municipal taxes – Other provinces	\$180

Source: Signal49 Research.

Table E.13
 Innisfail — tourist visits

	Same-day visits	Unique Overnight visitors	Overnight visits	Nights stayed
Total	413,232	71,634	91,555	152,008
Canada	407,447	70,551	90,414	147,474
Alberta	339,918	55,061	72,241	104,296
BC	34,433	7,738	9,138	22,696
Prairies	17,040	4,427	5,552	12,806
Central Canada	13,847	2,519	2,638	5,849
Atlantic Canada	1,533	530	543	839
Territories	676	200	206	729
United States	3,950	740	779	2,899
Other international	1,835	344	362	1,635

Sources: Signal49 Research; Environics Analytics.



Table E.14
 Innisfail — tourism spending
 (2024 Canadian dollars, \$ thousands)

	Total spending	Overnight	Same-day
Total	\$35,801	\$10,390	\$25,411
Accommodation	\$2,855	\$2,855	n/a
Vehicle rental	\$256	\$97	\$159
Vehicle operation*	\$11,625	\$2,591	\$9,034
Commercial transportation**	\$64	\$35	\$29
Local transportation	\$122	\$70	\$52
Food and beverage, in restaurants and bars	\$5,873	\$1,531	\$4,342
Food and beverage, in stores during trip	\$6,011	\$1,225	\$4,786
Recreation and entertainment	\$2,498	\$766	\$1,732
Clothing	\$2,324	\$504	\$1,820
Other expenditures	\$4,173	\$716	\$3,457
Canada	\$34,962	\$9,907	\$25,055
United States	\$545	\$302	\$243
Other international	\$293	\$181	\$113

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.



Table E.15
Lacombe — tax revenues generated
(2024 Canadian dollars, thousands)

Total tax revenues impacts	\$16,205
Federal taxes	\$10,016
Provincial taxes - Alberta	\$4,014
Provincial taxes – Other provinces	\$1,117
Municipal taxes – local area	\$408
Municipal taxes – rest of Alberta	\$385
Municipal taxes – Other provinces	\$265

Source: Signal49 Research.

Table E.16
Lacombe — tourist visits

	Same-day visits	Unique overnight visitors	Overnight visits	Nights stayed
Total	260,470	215,601	326,499	624,968
Canada	248,355	211,637	322,424	610,034
Alberta	114,834	179,617	286,600	532,842
BC	66,736	13,721	15,797	35,348
Prairies	39,848	8,302	9,774	20,274
Central Canada	23,607	7,835	8,017	16,545
Atlantic Canada	1,486	1,639	1,656	3,371
Territories	1,844	259	284	845
United States	6,862	2,245	2,308	7,384
Other international	5,253	1,719	1,767	7,550

Sources: Signal49 Research; Environics Analytics.



Table E.17
Lacombe — tourism spending
(2024 Canadian dollars, \$ thousands)

	Total spending	Overnight	Same-day
Total	\$51,703	\$35,172	\$16,531
Accommodation	\$7,136	\$7,136	n/a
Vehicle rental	\$642	\$531	\$111
Vehicle operation*	\$11,660	\$6,574	\$5,086
Commercial transportation**	\$204	\$184	\$20
Local transportation	\$404	\$367	\$36
Food and beverage, in restaurants and bars	\$6,918	\$3,874	\$3,044
Food and beverage, in stores during trip	\$9,684	\$6,344	\$3,341
Recreation and entertainment	\$5,132	\$3,923	\$1,209
Clothing	\$3,850	\$2,579	\$1,270
Other expenditures	\$6,073	\$3,660	\$2,413
Canada	\$49,590	\$33,982	\$15,609
United States	\$722	\$284	\$438
Other international	\$1,391	\$907	\$484

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.



Table E.18
Red Deer County — tax revenues generated
(2024 Canadian dollars, thousands)

Total tax revenues impacts	\$36,933
Federal taxes	\$22,760
Provincial taxes - Alberta	\$9,463
Provincial taxes – Other provinces	\$2,395
Municipal taxes – local area	\$925
Municipal taxes – rest of Alberta	\$815
Municipal taxes – Other provinces	\$574

Source: Signal49 Research.

Table E.19
Red Deer County — tourist visits

	Same-day visits	Unique overnight visitors	Overnight visits	Nights stayed
Total	489,704	345,361	495,027	809,140
Canada	478,298	339,954	489,333	790,564
Alberta	366,366	282,959	426,054	666,923
BC	57,618	26,408	29,309	56,280
Prairies	30,435	17,170	19,891	39,117
Central Canada	21,701	10,193	10,726	20,446
Atlantic Canada	1,207	2,302	2,320	5,294
Territories	972	619	707	1,697
United States	7,714	3,657	3,851	10,602
Other international	3,692	1,750	1,843	7,974

Sources: Signal49 Research; Environics Analytics.



Table E.20
 Red Deer County — tourism spending
 (2024 Canadian dollars, \$ thousands)

	Total spending	Overnight	Same-day
Total	\$112,725	\$79,376	\$33,348
Accommodation	\$21,461	\$21,461	n/a
Vehicle rental	\$795	\$587	\$209
Vehicle operation*	\$31,751	\$19,895	\$11,856
Commercial transportation**	\$315	\$276	\$38
Local transportation	\$621	\$553	\$68
Food and beverage, in restaurants and bars	\$17,399	\$11,700	\$5,698
Food and beverage, in stores during trip	\$15,860	\$9,579	\$6,281
Recreation and entertainment	\$8,191	\$5,918	\$2,273
Clothing	\$6,277	\$3,889	\$2,388
Other expenditures	\$10,055	\$5,518	\$4,537
Canada	\$109,887	\$77,315	\$32,572
United States	\$1,333	\$808	\$525
Other international	\$1,505	\$1,253	\$251

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.



Table E.21
Rocky Mountain House — tax revenues generated
(2024 Canadian dollars, thousands)

Total tax revenues impacts	\$16,060
Federal taxes	\$9,974
Provincial taxes - Alberta	\$4,052
Provincial taxes – Other provinces	\$1,047
Municipal taxes – local area	\$368
Municipal taxes – rest of Alberta	\$372
Municipal taxes – Other provinces	\$249

Source: Signal49 Research.

Table E.22
Rocky Mountain House — tourist visits

	Same-day visits	Unique overnight visitors	Overnight visits	Nights stayed
Total	305,424	92,895	127,882	249,200
Canada	305,046	90,949	125,891	242,702
Alberta	300,504	76,197	109,627	206,342
BC	3,555	7,108	8,023	18,734
Prairies	448	4,031	4,529	9,925
Central Canada	492	2,723	2,783	5,348
Atlantic Canada	33	650	655	1,484
Territories	14	184	218	782
United States	178	914	935	3,381
Other international	201	1,032	1,056	3,117

Sources: Signal49 Research; Environics Analytics.



Table E.23
 Rocky Mountain House — tourism spending
 (2024 Canadian dollars, \$ thousands)

	Total spending	Overnight	Same-day
Total	\$49,178	\$22,844	\$26,334
Accommodation	\$6,237	\$6,237	n/a
Vehicle rental	\$421	\$257	\$165
Vehicle operation*	\$15,034	\$5,672	\$9,362
Commercial transportation**	\$109	\$79	\$30
Local transportation	\$211	\$157	\$54
Food and beverage, in restaurants and bars	\$7,852	\$3,353	\$4,500
Food and beverage, in stores during trip	\$7,679	\$2,720	\$4,960
Recreation and entertainment	\$3,483	\$1,688	\$1,795
Clothing	\$2,996	\$1,110	\$1,886
Other expenditures	\$5,157	\$1,574	\$3,583
Canada	\$48,121	\$21,820	\$26,302
United States	\$482	\$466	\$15
Other international	\$575	\$558	\$17

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.



Table E.24
Sylvan Lake — tax revenues generated
(2024 Canadian dollars, thousands)

Total tax revenues impacts	\$22,076
Federal taxes	\$13,613
Provincial taxes - Alberta	\$5,647
Provincial taxes – Other provinces	\$1,431
Municipal taxes – local area	\$555
Municipal taxes – rest of Alberta	\$487
Municipal taxes – Other provinces	\$343

Source: Signal49 Research.

Table E.25
Sylvan Lake — tourist visits

	Same-day visits	Unique overnight visitors	Overnight visits	Nights stayed
Total	465,256	155,224	205,699	430,277
Canada	464,959	151,487	201,579	411,328
Alberta	461,687	120,248	165,771	306,439
BC	1,615	15,928	18,226	55,132
Prairies	802	7,988	9,561	24,761
Central Canada	477	5,386	5,891	18,315
Atlantic Canada	231	1,390	1,495	4,403
Territories	148	337	397	1,399
United States	185	2,332	2,571	11,334
Other international	112	1,405	1,549	7,615

Sources: Signal49 Research; Environics Analytics.



Table E.26
 Sylvan Lake — tourism spending
 (2024 Canadian dollars, \$ thousands)

	Total spending	Overnight	Same-day
Total	\$67,415	\$43,747	\$23,667
Accommodation	\$12,444	\$12,444	n/a
Vehicle rental	\$665	\$517	\$148
Vehicle operation*	\$19,099	\$10,685	\$8,414
Commercial transportation**	\$173	\$146	\$27
Local transportation	\$341	\$292	\$48
Food and beverage, in restaurants and bars	\$10,481	\$6,437	\$4,044
Food and beverage, in stores during trip	\$9,505	\$5,048	\$4,458
Recreation and entertainment	\$4,786	\$3,173	\$1,613
Clothing	\$3,767	\$2,072	\$1,695
Other expenditures	\$6,154	\$2,934	\$3,220
Canada	\$63,658	\$40,006	\$23,652
United States	\$2,775	\$2,765	\$9
Other international	\$982	\$976	\$6

*Including gas and repairs

**Within Canada. Includes trains, buses, etc.

Sources: Signal49 Research; Environics Analytics; Moneris.



Forecasts and research often involve numerous assumptions and data sources, and are subject to inherent risks and uncertainties. This information is not intended as specific investment, accounting, legal, or tax advice. The responsibility for the findings and conclusions of this research rests entirely with Signal49 Research.

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Where knowledge
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