

Economic Impact Study – Sports City, St. Albert, Alberta



Prepared for:

SAS Sports and Entertainment

June 17, 2011

June 17, 2011

Mr. Patrick Cassidy
SAS Sports and Entertainment
#207, 125 Carleton Drive
St. Albert, Alberta
T8N 3S6

Dear Mr. Cassidy:

Re: Economic Impact Study – Sports City

urbanMetrics inc. is pleased to submit our report detailing the analysis and findings of our economic impact study of the proposed Sports City project.

The analyses and appendices in the attached report provide our detailed study findings and conclusions.

It has been a pleasure conducting this study on behalf of SAS Sports and Entertainment and we look forward to discussing our results.

Yours truly,
urbanMetrics inc.



Peter Thoma, MCIP, RPP, PLE
Partner

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EXECUTIVE SUMMARY

PURPOSE

This report has been prepared by urbanMetrics inc. (urbanMetrics) on behalf of SAS Sports & Entertainment Group (SAS Sports). It provides an independent evaluation of the economic impacts of the St. Albert Sports City proposal which is a major development initiative being pursued by SAS Sports.

The economic impact analysis contained herein will be submitted as part of SAS's development application within the Area Structure Plan (ASP). While a detailed economic impact analysis is not required by council, this report is intended to quantify the overall benefits of Sports City in terms of tax uplift, in addition to local and regional economic 'spin-off' activity generated by the construction and ongoing future operations of Sports City.

BACKGROUND

The St. Albert Sports City project (Sports City) is located in St. Albert, Alberta. The multi-purpose sports facility would be developed as an academy and centre for excellence for young athletes who are pursuing their ambitions of competing at the highest levels of their sports. Sports City would be developed as an 30 to 35 acre project housing world class facilities for both training and competitive purposes (e.g. tournaments and recreational/community based sports leagues) that will be incorporated as part of a larger mixed-use development featuring industrial, commercial, and residential components.

Sports City would draw elite athletes to the City of St. Albert where they would be able to pursue both academic excellence and on-field/on-ice training on a single campus in state of the art facilities. The development concept envisions more than 1,500 athletes being enrolled in a variety of sports programs each year. The athletes would be spread across about 10 sports programs, which include hockey, baseball, softball, soccer, golf, football, gymnastics, track and field, figure skating, tennis, and rugby. The facility is intended to be developed as a best in-class facility, which would help athletes break into the upper echelon of their respective sports, whether it's a scholarship to elite U.S. colleges, a position on National and Olympics teams, or getting drafted directly by a professional franchise.

SAS Sports currently has an agreement in place to purchase approximately 245 acres of vacant, undeveloped land in the City of St. Albert. A portion of the lands are currently zoned residential (approximately 80 acres), while the remainder exists in a 'future study area' designation. The development concept allocates the 245 acres of land accordingly:

- 35 acres – for the farmer's market, movie theatre, major sports facilities, academy/private school and some small scale accessory retail enterprises;

- 82 acres – residential; and
- 128 acres – expected to be developed with a combination of industrial, commercial and institutional uses.

The Sport City development concept envisions that 30 to 35 acres of land within the future study area would be used to support various sports and academic facilities, as well as on-site dormitory style residences for the students of the academy programs. The concept also includes a 2,500-3,500 seat baseball stadium to be used by the Edmonton Prospects, a team that participates in the Western Major Baseball League.

This area would also include a range of other commercial activities including a farmer's market, movie theatre, and a small complement of professional offices. A range of other retail/commercial uses are also envisioned, such as a sports merchandise store and a selection of food and beverage operations within some of facilities. It is important to note that the program is still at the conceptual stages and many of the facilities are still subject to more detailed refinement in terms of size and scope.

A golf academy/training centre and street-front retail units, along with light industrial and commercial units would be constructed to the north and to the east of the major sports facilities.

ONE TIME CONSTRUCTION IMPACTS

In our analysis of construction impacts we have taken into consideration the economic benefits related to the construction of entire Sports City development, including:

- The academy/private school;
- Sports facilities (ice surfaces and fieldhouse complex);
- Athletes Nation sports performance training facility;
- Student accommodations;
- Movie theatre;
- Restaurants;
- Farmer's Market;
- Professional office space (e.g. medical offices); and,
- Other selected commercial enterprises.

Based on initial construction estimates provided by SAS Sports the total capital costs associated with the construction of Sports City, including fixtures and furnishing, are expected to be approximately **\$129 million**.

SUMMARY OF ECONOMIC IMPACTS - CONSTRUCTION

	Direct	Indirect	Total Open	Induced	Total Closed
Output	\$129,372,253	\$67,592,981	\$196,965,234	\$56,930,816	\$253,896,050
GDP at Basic Prices	\$53,385,871	\$32,045,860	\$85,431,732	\$32,038,807	\$117,470,539
Labour Income	\$42,683,009	\$20,393,184	\$63,076,194	\$18,391,598	\$81,467,792
Employment (2010)	499.0	289.6	788.5	310.8	1,099.3
Government Revenues	\$20,258,631	\$14,298,713	\$34,557,343	\$14,489,486	\$49,046,829
<i>Federal Government</i>	\$13,657,226	\$8,817,874	\$22,475,100	\$9,713,038	\$32,188,138
<i>Alberta Government</i>	\$6,080,524	\$4,911,667	\$10,992,191	\$4,462,440	\$15,454,631
<i>Local Governments</i>	\$520,881	\$569,172	\$1,090,052	\$314,007	\$1,404,060

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact analysis

The initial investment of \$129 million will yield an additional bump of \$68 million of indirect spending activity, as well as an additional \$57 million of induced spending activity. ***Overall, the proposed Sports City development is expected to contribute \$254 million to the economic output (gross production) of Alberta.***

Overall, the construction of Sports City is projected to contribute \$117 million to the provincial gross domestic product, when direct, indirect, and induced impacts are considered.

The construction phase of Sports City is projected to generate approximately 1,100 jobs, when direct, indirect and induced employment attributed to the development is considered.

The construction of Sports City is projected to create approximately \$81 million in labour income, when all direct, indirect and induced economic impacts attributed to the 1,100 jobs created by the proposed development are considered.

Between all three levels of government collectively, the construction of the Sports City is expected to produce approximately \$49 million in government revenues.

RECURRING IMPACTS

Once constructed, the on-going operation of the Sports City complex will yield on-going, or *recurring* economic impacts on a year-over-year basis. urbanMetrics analysis of the economic impacts of ongoing operations of Sports City considers the following sources of revenue:

- Academy/private school operations;
- Commercial property lease agreements;
- Sports surface rentals; and,
- Sports City entertainment properties (movie theatre, play structure, ballpark complex).

SUMMARY OF RECURRING ECONOMIC IMPACTS

	Direct	Indirect	Total Open	Induced	Total Closed
Output	\$47,333,600	\$8,202,583	\$55,536,183	\$15,009,827	\$70,546,010
Material Inputs	\$34,115,417	\$4,427,080	\$38,542,497	\$3,339,624	\$41,882,121
GDP at Basic Prices	\$13,218,183	\$3,775,504	\$16,993,686	\$4,298,471	\$21,292,157
Labour Income	\$7,538,851	\$2,263,303	\$9,802,153	\$2,467,500	\$12,269,653
Employment (2010)	146.5	35.9	182.4	41.7	224.1
Government Revenues	\$5,012,636	\$6,070,973	\$11,083,609	\$2,064,637	\$13,148,246
<i>Federal Government</i>	<i>\$2,957,724</i>	<i>\$4,269,493</i>	<i>\$7,227,218</i>	<i>\$1,340,467</i>	<i>\$8,567,685</i>
<i>Alberta Government</i>	<i>\$1,590,307</i>	<i>\$1,503,383</i>	<i>\$3,093,690</i>	<i>\$578,805</i>	<i>\$3,672,495</i>
<i>Local Governments</i>	<i>\$464,605</i>	<i>\$298,097</i>	<i>\$762,701</i>	<i>\$145,365</i>	<i>\$908,067</i>

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact analysis

The ongoing operation of Sports City is expected to directly contribute approximately \$47 million to the local economy, in addition to \$8 million of indirect production, and \$14 million of induced production. ***Overall, the proposed development is expected to contribute approximately \$70 million to the economic output of the Province during each full year of operation.***

Overall, the ongoing operation of Sports City is expected to contribute more than \$21 million towards gross domestic product.

The ongoing operation of Sports City is projected to generate approximately 224 jobs, when direct, indirect and induced employment attributed to the development is considered.

The construction of Sports City is projected to create approximately \$12 million in labour income, when all direct, indirect and induced economic impacts attributed to the 147 jobs created by the proposed development are considered.

Between all three levels of government collectively, the ongoing operation of the Sports City is expected to produce approximately \$13 million in government revenues.

VISTORS SPENDING

The introduction of Sports City into the local economy will yield significant spin-off business activity within St. Albert and the larger Edmonton region as a whole. Based on our analysis of the scale and scope of the proposed project, Sports City would be a major economic catalyst that attracts increased expenditures in the local economy.

It is important to point out that the Sports City concept is very much an export-oriented facility. Similar to tourism (another export-oriented industry) Sports City will draw external visitors and expenditures to the City of St. Albert. In terms of economic trade, these expenditures would be considered exports. The following provides an illustrative ‘snapshot’ of annual visitor

expenditures made in St. Albert, by virtue of students, staff, league participants, and family/friends of academy students:

- Off-Campus Student Spending: \$9.4 million.
- Staff Spending: \$3.3 million.
- Non-local Visitor Spending: \$5.0 million.

PROPERTY TAX IMPACTS

urbanMetrics has undertaken a comparative assessment of Property Tax revenues which would be realized by the municipality *with* and *without* the Sports City.

Based on anticipated absorption rates for industrial land in St. Albert (the status quo), we estimate that the first ten years of development on the subject lands would yield a cumulative development that would see approximately 99 acres developed. Over ten years, the City would realize in the order of \$8.5 million of tax revenue under the status quo industrial scenario. Alternatively, if the subject lands were built out with Sports City, accompanied with successive on-going industrial and commercial growth, we estimate that the City of St. Albert could realize substantively higher tax revenue. If SAS's lands were developed as proposed (82 acres Residential, 35 acres Sports City, and 128 acres Commercial/Industrial) the City could yield upwards of \$31 million over a ten year period.

STRATEGIC ASSESSMENT

In addition to the quantitative economic impacts of the Sports City, urbanMetrics also completed a strategic assessment to evaluate how the development aligns with the broader goals and objectives of the City of St. Albert. The strategic assessment is focused on economic diversification, tourism development, sports and cultural amenities, and building healthy communities in the City of St. Albert.

In terms of economic diversification, the City of St. Albert has been focused on increasing the non-residential tax assessment base, in comparison to the residential tax assessment base. While achieving an 80/20 split was identified as a critical objective, the *2011 Future Industrial Land Requirements Study* indicates that achieving an 80/20 split between residential and non-residential development is not an important factor in determining the future economic prosperity of St. Albert. It is more to attract non-residential development that creates high-quality employment opportunities for local residents, which create a variety of indirect economic benefits and induce further positive economic impacts.

With the addition of a large mixed-use development centered around Sports City, it is our professional opinion that St. Albert would be helping to strengthen the diversity of the local economy.

The brand and marketing strategy for St. Albert has an important influence on sports and cultural development in the local community. While branding St. Albert as Alberta's sports centre was not ultimately chosen as the final branding strategy for the community, this alternative was carefully explored based on extensive community input and the character of the existing assets. The proposed Sports City would help to further promote the development of St. Albert as a provincial and national centre for sports and recreational activities, drawing customers from an extended market area, given the provincial, national, and international attraction potential of the proposed development.

Like the effect of the IMG Academy in Bradenton, Florida the proposed development has the potential to make a significant contribution to economic development in St. Albert, bringing increased national and international recognition to the community.

BOTTOM LINE

Based on our professional opinion, Sports City, as proposed by SAS Sports would represent a significant economic boost to the City of St. Albert, and to the provincial economy as a whole.

The facility would not only provide opportunities for diversification and economic uplift, it would also improve awareness levels, making the City of St. Albert a more top-of-mind location both nationally and internationally. The facility would help elevate St. Albert's position as a destination for talented young people focused on athletic and academic success at the highest level.

The Sports City concept, as proposed, would be the type of private sector business enterprise that virtually any economic development agency in North America would be keen to help make happen.

1 INTRODUCTION

SAS Sports and Entertainment Group (SAS Sports) has retained urbanMetrics inc. to undertake an independent economic impact study, which quantifies the direct, indirect and induced benefits of the proposed Sports City, in terms of job creation, value-added production, and municipal, provincial and federal tax benefits. The study also seeks to quantify consumer spending and other economic activity attributed to the introduction of the Sports City into the municipality.

1.1 PURPOSE

This report has been prepared by urbanMetrics inc. (urbanMetrics) on behalf of SAS Sports & Entertainment Group (SAS Sports). It provides an independent economic impact study of the St. Albert Sports City proposal which is a major development initiative being pursued by SAS Sports.

The economic impact analysis will be included as part of SAS's development application within the Area Structure Plan (ASP). While a detailed economic impact analysis is not required by council, this report is intended to quantify the overall benefits of Sports City in terms of tax uplift, in addition to local and regional economic 'spin-off' activity.

1.2 BACKGROUND

The St. Albert Sports City project (Sports City) is located in St. Albert, Alberta. The multi-purpose sports facility would be developed as an academy and centre for excellence for young athletes who are pursuing their ambitions of competing at the highest levels of their sports. Sports City would be developed as an 30 to 35 acre project housing world class facilities for both training and competitive purposes (e.g. tournaments and recreational/community based sports leagues) that will be incorporated as part of a larger mixed-use development featuring industrial, commercial, and residential components.

Sports City would draw elite athletes to the City of St. Albert where they would be able to pursue both academic excellence and on-field/on-ice training on a single campus in state of the art facilities. The development concept envisions more than 1,500 athletes being enrolled in a variety of sports programs each year. The athletes would be spread across about 10 sports programs, which include hockey, baseball, softball, soccer, golf, football, gymnastics, track and field, figure skating, tennis, and rugby. The facility is intended to be developed as a best in-class facility, which would help athletes break into the upper echelon of their respective sports, whether it's a scholarship to elite U.S. colleges, a position on National and Olympics teams, or getting drafted directly by a professional franchise.

SAS Sports currently has an agreement in place to purchase approximately 245 acres of vacant, undeveloped land in the City of St. Albert. A portion of the lands are currently zoned residential (approximately 80 acres), while the remainder exists in a 'future study area' designation. The development concept allocates the 245 acres of land accordingly:

- 35 acres – for the farmer's market, movie theatre, major sports facilities, academy/private school and some small scale accessory retail enterprises;
- 82 acres – residential; and
- 128 acres – expected to be developed with a combination of industrial, commercial and institutional uses.

The Sport City development concept envisions that 30 acres of land within the future study area would be used to support various sports and academic facilities, as well as on-site dormitory style residences for the students of the academy programs. The concept also includes a 2,500-3,500 seat baseball stadium to be used by the Edmonton Prospects, a team that participates in the Western Major Baseball League.

This area would also include a range of other commercial activities including a farmer's market, movie theatre, and a small complement of professional offices. A range of other retail/commercial uses are also envisioned, such as a sports merchandise store and a selection of food and beverage operations within some of facilities. It is important to note that the program is still at the conceptual stages and many of the facilities are still subject to more detailed refinement in terms of size and scope.

A golf academy/training centre and street-front retail units, along with additional light industrial and commercial units would also be constructed north of the major sports facilities and directly east of the large water feature. The most recent site map for Sports City is provided in Figure 1-1.

FIGURE 1-1: SPORTS CITY SITE MAP



It is our understanding that the City of St. Albert is currently in the process of finalizing its updated *Municipal Development Plan (MDP)*. At the same time, there is a new *Area Development Plan (ADP)* being completed which encompasses the SAS Sports lands. In considering these plans, City Council has expressed its desire to ensure that its property tax base is properly balanced between residential and non-residential assessment. The current tax assessment split for St. Albert, according to the City of St. Albert, is 89% residential and 11% non-residential.

The municipality has established a formal target of 80/20 that was identified in the updated 2007 MDP. Having said that, it has been recognized that the achievement of this target will not have a significant impact on future economic prosperity in St. Albert. According to the newly released *2011 Future Industrial Land Requirements Study*, it is more important for the City of St. Albert to invest in non-residential development that offers local residents high quality employment opportunities, which create spin-off effects for various sectors of the local economy, rather than simply pursuing 80/20 split between the residential and non-residential assessment base.

2 METHODOLOGY

The methodology we have used to prepare our economic impact study for Sports City was developed based on our professional experience with comparable economic impact studies across Canada. We have used a variety of analytical techniques to help illustrate the direct, indirect and induced economic impacts of the proposed development on the community of St. Albert, the province of Alberta, and Canada as a whole.

The primary elements of our economic impact study include:

- **Construction Impact** – urbanMetrics analyzed the economic impact in terms of the cost of construction and the jobs created to during the construction of the proposed development.
- **Operating Impact** – urbanMetrics has analyzed the recurring economic impact of the proposed development, taking into consideration the operating impacts derived from the academy programs and the major sports developments centre operated at Sports City. We have taken into consideration the direct, indirect and induced operating impacts of the proposed development.
- **Tourism Impact** – Our study includes an analysis of the tourism related impacts of the proposed development, which include the economic impacts of various tournaments, camps and special events hosted at Sports City. We have also quantified expenditures made by friends/family while visiting students attending the various academy programs.
- **Direct Tax Impact** – urbanMetrics has reviewed the direct tax impacts for each level of government. We have analyzed the municipal, provincial, and federal tax benefits attributed to the proposed development for the ongoing operation and construction period based on forecasted revenues.
- **Municipal Property Tax Impact** – to further illustrate the potential tax benefits of the Sports City, we have compared the municipal property tax revenue that would be generated from the subject site if zoning remains industrial, compared to the tax revenue that would be generated by the Sports City development (which would include a variety of land uses including residential and commercial development).
- **Strategic Assessment** – urbanMetrics has also provided a strategic assessment of how the proposed development concept aligns with the broader goals and objectives of key stakeholders, particularly as they relate to issues such as economic diversification, tourism development, and sports/cultural investment.

The *Alberta Finance and Enterprise – Custom Economic Impact Analysis* was used as the foundation for analyzing of the economic benefits of the proposed development. This input-output model was utilized by urbanMetrics to estimate the direct, indirect, and induced impacts of Sports City on the Gross Domestic Product (GDP), labour income, level of employment and government tax revenues. The *Alberta Finance and Enterprise – Custom Economic Impact*

Analysis was also used to estimate total and direct impacts of Sports City on municipal, provincial, and federal tax revenues.

The purpose of the economic output model is to measure the economic impact of each dollar spent, in addition to the number of jobs created, and the associated labour income that is generated by a particular development. The economic output model is also used to illustrate how one-time capital expenditures circulate through the local, provincial and national economy, producing a multiplier effect¹, which increases the economic impact of the initial capital expenditures, creating more jobs and inducing further spending.

The basic outputs of an economic model illustrate the direct, indirect and induced economic impact created by the initial capital investment.

- **Direct** economic generally refers to the employment and revenue generated by a particular development or business enterprise (e.g. teachers and other staff employed at Sports City).
- **Indirect** economic impact generally refers to the purchase of goods and services by the specific development or business enterprise in terms of the employment and revenues generated by firms in supporting industries (e.g. employees working at companies that supply sports equipment to operate the Sports City facilities/programs).
- **Induced** economic impact estimates the increase in employment and expenditures resulting from both direct and indirect business activity. There is a multiplier effect created by the increased number of jobs available in the community, which increases the level of household income, leading to a rise in consumer spending and general business activity (e.g. the retail spending by direct and indirect employees of Sports City).

¹The *multiplier effect* refers to the economic spin off activity attributed to the initial capital investment.

3 CONSTRUCTION IMPACT

Based on initial construction estimates provided by SAS Sports, the total capital costs associated with the construction of Sports City, including fixtures and furnishing, are expected to be approximately \$129 million². In our analysis of construction impacts we have taken into consideration the economic benefits related to the construction of entire Sports City development, including:

- The academy/private school;
- Sports facilities (ice surfaces and fieldhouse complex);
- Athletes Nation sports performance training facility;
- Student accommodations;
- Movie theatre;
- Restaurants;
- Farmer’s Market;
- Professional office space (e.g. medical offices); and
- Other selected commercial enterprises.

Table 3-1 summarizes the direct, indirect and induced economic impacts created by the large one-time capital expenditure required to finance the construction of the proposed development.

FIGURE 3-1: SUMMARY OF ECONOMIC IMPACTS

	Direct	Indirect	Total Open	Induced	Total Closed
Output	\$129,372,253	\$67,592,981	\$196,965,234	\$56,930,816	\$253,896,050
GDP at Basic Prices	\$53,385,871	\$32,045,860	\$85,431,732	\$32,038,807	\$117,470,539
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<i>Local Governments</i>	\$520,881	\$569,172	\$1,090,052	\$314,007	\$1,404,060

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact analysis

² Land acquisition costs are not included as part of the one-time capital expenditure required to finance the construction of the St. Albert Sport City.

The investment in the construction of Sports City is expected to generate approximately \$129 million in direct spending in the economy, in addition to \$68 million of indirect spending activity, and \$57 million of induced spending activity. **Overall, the proposed development is expected to contribute \$254 million to the gross production in Alberta³.**

Figure 3-2 details the direct, indirect and induced impacts on gross production created by the one-time capital investment required to finance the construction of the St. Albert Sport City. The direct expenditures related to the construction of the proposed development are concentrated in three industry categories – construction; finance, insurance, and real estate; and, professional, scientific and technical services.

³ It is important to note that the economic output model underestimates municipal tax impacts. Based on the total construction costs (\$129 million) the Sports City project would generate more than \$1 million (\$1,067,521) in building permit revenues for the City of St. Albert.

FIGURE 3-2: GROSS PRODUCTION BY INDUSTRY (\$000)

MEDIUM AGGREGATION	Direct	Indirect	Total Open	Induced	Total Closed
Crop and animal production	\$0	\$129	\$129	\$16	\$145
Forestry and logging	\$0	\$185	\$185	\$41	\$226
Fishing, hunting and trapping	\$0	\$0	\$0	\$0	\$0
Support activities for agriculture and forestry	\$0	\$35	\$35	\$8	\$43
Oil and gas extraction	\$0	\$2,368	\$2,368	\$212	\$2,579
Mining (except oil and gas extraction)	\$0	\$915	\$915	\$187	\$1,102
Support activities for mining and oil and gas extraction	\$0	\$188	\$188	\$82	\$270
Electric power generation, transmission and distribution	\$0	\$574	\$574	\$77	\$651
Natural gas distribution, water, sewage and other systems	\$0	\$143	\$143	\$19	\$162
Construction	\$123,939	\$520	\$124,458	\$36,503	\$160,961
Food manufacturing	\$0	\$151	\$151	\$21	\$172
Beverage and tobacco product manufacturing	\$0	\$17	\$17	\$3	\$20
Textile and textile product mills	\$0	\$72	\$72	\$25	\$96
Clothing manufacturing	\$0	\$1	\$1	\$0	\$1
Leather and allied product manufacturing	\$0	\$2	\$2	\$0	\$2
Wood product manufacturing	\$0	\$1,794	\$1,794	\$464	\$2,258
Paper manufacturing	\$0	\$54	\$54	\$12	\$66
Printing and related support activities	\$0	\$157	\$157	\$47	\$204
Petroleum and coal products manufacturing	\$0	\$2,372	\$2,372	\$82	\$2,454
Chemical manufacturing	\$0	\$802	\$802	\$61	\$863
Plastics and rubber products manufacturing	\$0	\$1,031	\$1,031	\$249	\$1,280
Non-metallic mineral product manufacturing	\$0	\$8,027	\$8,027	\$1,836	\$9,863
Primary metal manufacturing	\$0	\$334	\$334	\$46	\$380
Fabricated metal products manufacturing	\$0	\$6,827	\$6,827	\$1,975	\$8,802
Machinery manufacturing	\$0	\$735	\$735	\$187	\$922
Computer and electronic product manufacturing	\$0	\$226	\$226	\$64	\$290
Electrical equipment, appliance and component manufacturing	\$0	\$149	\$149	\$52	\$202
Transportation equipment manufacturing	\$0	\$16	\$16	\$5	\$21
Furniture and related product manufacturing	\$0	\$161	\$161	\$59	\$220
Miscellaneous manufacturing	\$0	\$503	\$503	\$175	\$678
Wholesale trade	\$0	\$6,231	\$6,231	\$2,255	\$8,486
Retail trade	\$0	\$1,532	\$1,532	\$740	\$2,272
Truck transportation	\$0	\$1,508	\$1,508	\$610	\$2,118
Transit and ground passenger transportation	\$1	\$51	\$52	\$23	\$75
Pipeline transportation	\$0	\$131	\$131	\$15	\$146
Other transportation	\$0	\$939	\$939	\$259	\$1,198
Postal service and couriers and messengers	\$0	\$353	\$353	\$153	\$506
Warehousing and storage	\$0	\$58	\$58	\$41	\$99
Motion picture and sound recording industries	\$0	\$20	\$20	\$3	\$23
Broadcasting and telecommunications	\$5	\$807	\$812	\$179	\$991
Publishing industries, information services and data processing services	\$0	\$380	\$380	\$117	\$497
Finance, insurance, real estate and rental and leasing	\$4,334	\$6,679	\$11,013	\$3,007	\$14,020
Professional, scientific and technical services	\$1,082	\$9,892	\$10,973	\$5,177	\$16,150
Administrative and support services	\$0	\$418	\$418	\$236	\$654
Waste management and remediation services	\$0	\$1,109	\$1,109	\$599	\$1,707
Educational services	\$0	\$80	\$80	\$59	\$139
Health care and social assistance	\$0	\$27	\$27	\$15	\$42
Arts, entertainment and recreation	\$4	\$98	\$102	\$44	\$146
Accommodation and food services	\$0	\$544	\$544	\$202	\$746
Repair and maintenance	\$0	\$637	\$637	\$315	\$952
Grant-making, civic, and professional and similar organizations	\$0	\$107	\$107	\$62	\$170
Personal and laundry services and private households	\$0	\$48	\$48	\$23	\$71
Operating, office, cafeteria and laboratory supplies	\$0	\$2,432	\$2,432	\$0	\$2,432
Travel, entertainment, advertising and promotion	\$0	\$2,617	\$2,617	\$0	\$2,617
Transportation margins	\$0	\$1,805	\$1,805	\$0	\$1,805
Non-profit institutions serving households (excluding education)	\$0	\$7	\$7	\$3	\$10
Non-profit education services	\$0	\$0	\$0	\$0	\$0
Hospitals and government nursing and residential care facilities	\$0	\$30	\$30	\$18	\$48
Universities and government education services	\$3	\$112	\$116	\$70	\$185
Other municipal government services	\$0	\$310	\$310	\$142	\$452
Other provincial and territorial government services	\$5	\$82	\$87	\$17	\$104
Other federal government services	\$0	\$62	\$62	\$35	\$97
Total	\$129,372	\$67,593	\$196,965	\$56,931	\$253,896

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact model

In addition to the direct expenditures related to the proposed development, the construction of Sports City will generate substantial spin-off effects in other industries. The construction facility is projected stimulate indirect expenditure activity in almost every industry category. Of course, the largest percentage of indirect expenditures generated by the construction of Sports City would be concentrated in industries related to the construction industry. Outside of the construction industry, the five largest contributors to gross production include non-metallic mineral product manufacturing; fabricated metal products manufacturing; wholesale trade; finance, insurance, and real estate and rental/leasing; and, professional, scientific and technical services.

The construction of Sports City would contribute to the economic vitality of the local community by making a significant contribution to the gross production in several industry categories. Although the model is dealing with only the Provincial economic impacts, it is important to note that given the type of project that is being constructed, the vast majority of employment related to the construction and ongoing operation of Sports City will be concentrated in the Edmonton area.

3.1 GROSS DOMESTIC PRODUCT – CONSTRUCTION IMPACT

Figure 3-3 details the direct, indirect and induced impacts on gross domestic product (at basic prices⁴) created by the one-time capital investment required to finance the construction of St. Albert Sport City. The gross domestic product that is directly related to the construction of the proposed development is concentrated in three industry categories – construction; finance, insurance, and real estate and rental/leasing; and, professional, scientific and technical services.

As discussed in the previous section, the construction of Sports City will generate substantial spin-off effects in a variety of other industries, in addition to the gross domestic product directly related to the proposed development.

The largest indirect contribution to the gross domestic product generated by the construction of Sports City would be concentrated in industries related to the construction industry. Outside of the construction industry, the five largest contributors to gross domestic product include non-metallic mineral product manufacturing; fabricated metal products manufacturing; wholesale trade; finance, insurance, and real estate and rental/leasing; and, professional, scientific and technical services. **Overall, the construction of Sports City is projected to contribute \$117 million to the provincial gross domestic product**, when direct, indirect, and induced impacts are considered.

⁴ GDP at basic prices differs from GDP at factor cost by including net indirect taxes (indirect taxes less subsidies). Production expenses related to factors of production like property taxes, capital taxes and payroll taxes are included in GDP at basic prices.

FIGURE 3-3 GROSS DOMESTIC PRODUCT AT BASIC PRICES (\$000)

MEDIUM AGGREGATION	Direct	Indirect	Total Open	Induced (no	Total Closed
Crop and animal production	\$0	\$42	\$42	\$9	\$51
Forestry and logging	\$0	\$81	\$81	\$23	\$104
Fishing, hunting and trapping	\$0	\$0	\$0	\$0	\$0
Support activities for agriculture and forestry	\$0	\$15	\$15	\$5	\$20
Oil and gas extraction	\$0	\$1,782	\$1,782	\$119	\$1,901
Mining (except oil and gas extraction)	\$0	\$541	\$541	\$105	\$646
Support activities for mining and oil and gas extraction	\$0	\$120	\$120	\$46	\$166
Electric power generation, transmission and distribution	\$0	\$392	\$392	\$43	\$435
Natural gas distribution, water, sewage and other systems	\$0	\$98	\$98	\$11	\$109
Construction	\$49,752	\$288	\$50,040	\$20,543	\$70,583
Food manufacturing	\$0	\$42	\$42	\$12	\$53
Beverage and tobacco product manufacturing	\$0	\$8	\$8	\$2	\$9
Textile and textile product mills	\$0	\$33	\$33	\$14	\$47
Clothing manufacturing	\$0	\$0	\$0	\$0	\$1
Leather and allied product manufacturing	\$0	\$1	\$1	\$0	\$1
Wood product manufacturing	\$0	\$769	\$769	\$261	\$1,030
Paper manufacturing	\$0	\$21	\$21	\$7	\$27
Printing and related support activities	\$0	\$75	\$75	\$27	\$102
Petroleum and coal products manufacturing	\$0	\$306	\$306	\$46	\$352
Chemical manufacturing	\$0	\$161	\$161	\$35	\$196
Plastics and rubber products manufacturing	\$0	\$410	\$410	\$140	\$550
Non-metallic mineral product manufacturing	\$0	\$3,326	\$3,326	\$1,033	\$4,360
Primary metal manufacturing	\$0	\$73	\$73	\$26	\$99
Fabricated metal products manufacturing	\$0	\$2,962	\$2,962	\$1,111	\$4,073
Machinery manufacturing	\$0	\$322	\$322	\$105	\$428
Computer and electronic product manufacturing	\$0	\$100	\$100	\$36	\$136
Electrical equipment, appliance and component manufacturing	\$0	\$57	\$57	\$30	\$86
Transportation equipment manufacturing	\$0	\$6	\$6	\$3	\$8
Furniture and related product manufacturing	\$0	\$71	\$71	\$33	\$104
Miscellaneous manufacturing	\$0	\$268	\$268	\$98	\$367
Wholesale trade	\$0	\$3,654	\$3,654	\$1,269	\$4,923
Retail trade	\$0	\$971	\$971	\$416	\$1,387
Truck transportation	\$0	\$836	\$836	\$343	\$1,179
Transit and ground passenger transportation	\$1	\$29	\$31	\$13	\$44
Pipeline transportation	\$0	\$104	\$104	\$9	\$113
Other transportation	\$0	\$445	\$445	\$146	\$591
Postal service and couriers and messengers	\$0	\$195	\$195	\$86	\$282
Warehousing and storage	\$0	\$49	\$49	\$23	\$72
Motion picture and sound recording industries	\$0	\$9	\$9	\$2	\$11
Broadcasting and telecommunications	\$2	\$556	\$558	\$101	\$659
Publishing industries, information services and data processing services	\$0	\$254	\$254	\$66	\$320
Finance, insurance, real estate and rental and leasing	\$2,893	\$3,821	\$6,714	\$1,692	\$8,406
Professional, scientific and technical services	\$731	\$6,358	\$7,089	\$2,913	\$10,002
Administrative and support services	\$0	\$272	\$272	\$133	\$405
Waste management and remediation services	\$0	\$798	\$798	\$337	\$1,135
Educational services	\$0	\$68	\$68	\$33	\$102
Health care and social assistance	\$0	\$21	\$21	\$8	\$29
Arts, entertainment and recreation	\$2	\$50	\$52	\$25	\$77
Accommodation and food services	\$0	\$290	\$290	\$114	\$404
Repair and maintenance	\$0	\$409	\$409	\$177	\$586
Grant-making, civic, and professional and similar organizations	\$0	\$71	\$71	\$35	\$106
Personal and laundry services and private households	\$0	\$32	\$32	\$13	\$45
Operating, office, cafeteria and laboratory supplies	\$0	\$0	\$0	\$0	\$0
Travel, entertainment, advertising and promotion	\$0	\$0	\$0	\$0	\$0
Transportation margins	\$0	\$0	\$0	\$0	\$0
Non-profit institutions serving households (excluding education)	\$0	\$3	\$3	\$2	\$5
Non-profit education services	\$0	\$0	\$0	\$0	\$0
Hospitals and government nursing and residential care facilities	\$0	\$21	\$21	\$10	\$31
Universities and government education services	\$2	\$83	\$85	\$39	\$124
Other municipal government services	\$0	\$210	\$210	\$80	\$290
Other provincial and territorial government services	\$1	\$24	\$26	\$10	\$36
Other federal government services	\$0	\$43	\$43	\$20	\$62
Total	\$53,386	\$32,046	\$85,432	\$32,039	\$117,471

SOURCE: urbanMetrics Inc.

1) Based on Alberta Finance and Enterprise custom economic impact model

3.2 EMPLOYMENT – CONSTRUCTION IMPACT

The construction phase of Sports City is projected to generate approximately 1,100 jobs, when direct, indirect and induced employment attributed to the development is considered. Overall, 87% of the jobs that are projected to be induced and directly or indirectly created by the construction of Sports City are concentrated in the construction, the non-metallic mineral product manufacturing; the fabricated metal products manufacturing; the wholesale trade; the finance, insurance, and real estate and rental/leasing; and, the professional, scientific and technical services industries. The specialized nature of the proposed development will incorporate state of the art construction and design, which will require specialized businesses that will add to the local knowledge base.

The construction of Sports City is expected to generate 473 jobs in the construction industry that are directly related to the proposed development, in addition to a number of other jobs in the finance, insurance, and real estate and rental/leasing industry; and, the professional, scientific and technical services industry.

The proposed development is expected to generate approximately 290 jobs that are indirectly related to Sports City, in addition to 311 jobs that are created by induced production in the economy. Of the 1,100 total jobs that are projected to be created by the construction of Sports City, the majority are expected to provide full time employment. Figure 3-4 illustrates the distribution of jobs created by industry. A detailed chart is provided in Appendix A, which illustrates the number of full time jobs that are projected to be induced, directly, or indirectly created by the construction of the proposed development.

FIGURE 3-4: EMPLOYMENT BY INDUSTRY (JOBS)

MEDIUM AGGREGATION	Direct	Indirect	Total Open	Induced	Total Closed
Crop and animal production	\$0	\$1	\$1	\$0	\$1
Forestry and logging	\$0	\$1	\$1	\$0	\$1
Fishing, hunting and trapping	\$0	\$0	\$0	\$0	\$0
Support activities for agriculture and forestry	\$0	\$0	\$0	\$0	\$0
Oil and gas extraction	\$0	\$2	\$2	\$1	\$3
Mining (except oil and gas extraction)	\$0	\$2	\$2	\$1	\$3
Support activities for mining and oil and gas extraction	\$0	\$1	\$1	\$0	\$1
Electric power generation, transmission and distribution	\$0	\$1	\$1	\$0	\$1
Natural gas distribution, water, sewage and other systems	\$0	\$0	\$0	\$0	\$0
Construction	\$473	\$2	\$476	\$199	\$675
Food manufacturing	\$0	\$0	\$0	\$0	\$0
Beverage and tobacco product manufacturing	\$0	\$0	\$0	\$0	\$0
Textile and textile product mills	\$0	\$0	\$0	\$0	\$0
Clothing manufacturing	\$0	\$0	\$0	\$0	\$0
Leather and allied product manufacturing	\$0	\$0	\$0	\$0	\$0
Wood product manufacturing	\$0	\$7	\$7	\$3	\$9
Paper manufacturing	\$0	\$0	\$0	\$0	\$0
Printing and related support activities	\$0	\$1	\$1	\$0	\$1
Petroleum and coal products manufacturing	\$0	\$1	\$1	\$0	\$1
Chemical manufacturing	\$0	\$1	\$1	\$0	\$1
Plastics and rubber products manufacturing	\$0	\$4	\$4	\$1	\$5
Non-metallic mineral product manufacturing	\$0	\$27	\$27	\$10	\$37
Primary metal manufacturing	\$0	\$1	\$1	\$0	\$1
Fabricated metal products manufacturing	\$0	\$24	\$24	\$11	\$35
Machinery manufacturing	\$0	\$2	\$2	\$1	\$3
Computer and electronic product manufacturing	\$0	\$1	\$1	\$0	\$1
Electrical equipment, appliance and component manufacturing	\$0	\$1	\$1	\$0	\$1
Transportation equipment manufacturing	\$0	\$0	\$0	\$0	\$0
Furniture and related product manufacturing	\$0	\$1	\$1	\$0	\$1
Miscellaneous manufacturing	\$0	\$4	\$4	\$1	\$5
Wholesale trade	\$0	\$32	\$32	\$12	\$45
Retail trade	\$0	\$18	\$18	\$4	\$22
Truck transportation	\$0	\$9	\$9	\$3	\$13
Transit and ground passenger transportation	\$0	\$1	\$1	\$0	\$1
Pipeline transportation	\$0	\$0	\$0	\$0	\$0
Other transportation	\$0	\$4	\$4	\$1	\$5
Postal service and couriers and messengers	\$0	\$4	\$4	\$1	\$5
Warehousing and storage	\$0	\$1	\$1	\$0	\$1
Motion picture and sound recording industries	\$0	\$0	\$0	\$0	\$0
Broadcasting and telecommunications	\$0	\$3	\$3	\$1	\$4
Publishing industries, information services and data processing services	\$0	\$2	\$2	\$1	\$2
Finance, insurance, real estate and rental and leasing	\$17	\$23	\$40	\$16	\$57
Professional, scientific and technical services	\$8	\$71	\$79	\$28	\$107
Administrative and support services	\$0	\$6	\$6	\$1	\$7
Waste management and remediation services	\$0	\$11	\$11	\$3	\$14
Educational services	\$0	\$2	\$2	\$0	\$2
Health care and social assistance	\$0	\$0	\$0	\$0	\$0
Arts, entertainment and recreation	\$0	\$2	\$2	\$0	\$2
Accommodation and food services	\$0	\$6	\$6	\$1	\$7
Repair and maintenance	\$0	\$7	\$7	\$2	\$9
Grant-making, civic, and professional and similar organizations	\$0	\$1	\$1	\$0	\$2
Personal and laundry services and private households	\$0	\$1	\$1	\$0	\$1
Operating, office, cafeteria and laboratory supplies	\$0	\$0	\$0	\$0	\$0
Travel, entertainment, advertising and promotion	\$0	\$0	\$0	\$0	\$0
Transportation margins	\$0	\$0	\$0	\$0	\$0
Non-profit institutions serving households (excluding education)	\$0	\$0	\$0	\$0	\$0
Non-profit education services	\$0	\$0	\$0	\$0	\$0
Hospitals and government nursing and residential care facilities	\$0	\$0	\$0	\$0	\$0
Universities and government education services	\$0	\$1	\$1	\$0	\$1
Other municipal government services	\$0	\$2	\$2	\$1	\$3
Other provincial and territorial government services	\$0	\$0	\$0	\$0	\$0
Other federal government services	\$0	\$0	\$0	\$0	\$1
Total	499.0	289.6	788.5	310.8	1,099.3

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact model

According to the *2011 Future Industrial Land Requirements Study*, export-oriented employment is a catalyst to economic growth and industrial land is essential in order to accommodate export-oriented industries. As a result, it is important for the City of St. Albert to maintain an adequate industrial land base to accommodate prospective industrial tenants. The City of St. Albert has identified the following economic sectors as targets for export-oriented development:

- Professional, scientific, and technical services;
- Construction;
- Value-added manufacturing and production; and,
- Environmental and botanical industries.

The construction process would directly generate a significant number of jobs in each of the export-oriented economic sectors outlined above. These industry categories typically produce the largest indirect and induced economic benefits in the local economy, further enhancing the positive economic impacts. The significant number of jobs that are projected to be created during the construction of Sports City will not only increase the level of employment in the local community, but also provide additional labour income, which would induce further household spending in the economy.

It is important to point out that the Sports City concept is very much an export-oriented facility. Similar to tourism (another export-oriented industry) Sports City will draw external visitors and expenditures to the City of St. Albert. In terms of economic trade, these expenditures would be considered exports.

3.3 LABOUR INCOME – CONSTRUCTION IMPACT

The construction of Sports City is projected to create approximately \$81 million in labour income, when all direct, indirect and induced economic impacts attributed to the 1,100 jobs created by the proposed development are considered. Figure 3-5 details the labour income that is expected to be generated during the construction of the proposed development.

The majority of the labour income that is expected to be induced and directly or indirectly generated by the construction of Sports City is concentrated in the construction industry. Given the level of employment created by Sports City, the construction process is expected to generate millions of dollars in labour income in each of the five largest employment categories outside of the construction industry (non-metallic mineral product manufacturing; fabricated metal products manufacturing; wholesale trade; finance, insurance, and real estate and rental/leasing; and, professional, scientific and technical services).

Outside of the significant contribution towards gross production, the economic output model illustrated that the construction of St. Albert Sport City would generate a considerable number of jobs and additional labour income in the local area, providing increased economic stability for the City of St. Albert and the province as a whole.

FIGURE 3-5: LABOUR INCOME BY INDUSTRY (\$000)

MEDIUM AGGREGATION	Direct	Indirect	Total Open	Induced (no	Total Closed
Crop and animal production	\$0	\$16	\$16	\$5	\$21
Forestry and logging	\$0	\$44	\$44	\$13	\$57
Fishing, hunting and trapping	\$0	\$0	\$0	\$0	\$0
Support activities for agriculture and forestry	\$0	\$9	\$9	\$3	\$11
Oil and gas extraction	\$0	\$248	\$248	\$68	\$317
Mining (except oil and gas extraction)	\$0	\$201	\$201	\$60	\$261
Support activities for mining and oil and gas extraction	\$0	\$92	\$92	\$27	\$119
Electric power generation, transmission and distribution	\$0	\$84	\$84	\$25	\$109
Natural gas distribution, water, sewage and other systems	\$0	\$22	\$22	\$6	\$28
Construction	\$40,712	\$204	\$40,915	\$11,792	\$52,708
Food manufacturing	\$0	\$21	\$21	\$7	\$28
Beverage and tobacco product manufacturing	\$0	\$3	\$3	\$1	\$4
Textile and textile product mills	\$0	\$26	\$26	\$8	\$34
Clothing manufacturing	\$0	\$0	\$0	\$0	\$0
Leather and allied product manufacturing	\$0	\$0	\$0	\$0	\$1
Wood product manufacturing	\$0	\$490	\$490	\$150	\$640
Paper manufacturing	\$0	\$13	\$13	\$4	\$17
Printing and related support activities	\$0	\$50	\$50	\$15	\$65
Petroleum and coal products manufacturing	\$0	\$87	\$87	\$26	\$113
Chemical manufacturing	\$0	\$68	\$68	\$20	\$88
Plastics and rubber products manufacturing	\$0	\$265	\$265	\$80	\$345
Non-metallic mineral product manufacturing	\$0	\$1,947	\$1,947	\$593	\$2,540
Primary metal manufacturing	\$0	\$49	\$49	\$15	\$64
Fabricated metal products manufacturing	\$0	\$2,163	\$2,163	\$638	\$2,801
Machinery manufacturing	\$0	\$206	\$206	\$60	\$267
Computer and electronic product manufacturing	\$0	\$69	\$69	\$21	\$90
Electrical equipment, appliance and component manufacturing	\$0	\$55	\$55	\$17	\$72
Transportation equipment manufacturing	\$0	\$5	\$5	\$2	\$7
Furniture and related product manufacturing	\$0	\$62	\$62	\$19	\$82
Miscellaneous manufacturing	\$0	\$178	\$178	\$57	\$234
Wholesale trade	\$0	\$2,469	\$2,469	\$729	\$3,198
Retail trade	\$0	\$754	\$754	\$239	\$993
Truck transportation	\$0	\$666	\$666	\$197	\$863
Transit and ground passenger transportation	\$2	\$22	\$24	\$8	\$32
Pipeline transportation	\$0	\$17	\$17	\$5	\$22
Other transportation	\$0	\$282	\$282	\$84	\$365
Postal service and couriers and messengers	\$0	\$154	\$154	\$50	\$203
Warehousing and storage	\$0	\$43	\$43	\$13	\$56
Motion picture and sound recording industries	\$0	\$3	\$3	\$1	\$4
Broadcasting and telecommunications	\$1	\$182	\$183	\$58	\$241
Publishing industries, information services and data processing services	\$0	\$125	\$125	\$38	\$163
Finance, insurance, real estate and rental and leasing	\$1,365	\$1,958	\$3,324	\$971	\$4,295
Professional, scientific and technical services	\$599	\$5,131	\$5,730	\$1,672	\$7,402
Administrative and support services	\$0	\$239	\$239	\$76	\$315
Waste management and remediation services	\$0	\$647	\$647	\$193	\$840
Educational services	\$0	\$58	\$58	\$19	\$77
Health care and social assistance	\$0	\$16	\$16	\$5	\$21
Arts, entertainment and recreation	\$2	\$41	\$43	\$14	\$57
Accommodation and food services	\$0	\$202	\$202	\$65	\$268
Repair and maintenance	\$0	\$326	\$326	\$102	\$428
Grant-making, civic, and professional and similar organizations	\$0	\$64	\$64	\$20	\$85
Personal and laundry services and private households	\$0	\$22	\$22	\$7	\$30
Operating, office, cafeteria and laboratory supplies	\$0	\$0	\$0	\$0	\$0
Travel, entertainment, advertising and promotion	\$0	\$0	\$0	\$0	\$0
Transportation margins	\$0	\$0	\$0	\$0	\$0
Non-profit institutions serving households (excluding education)	\$0	\$3	\$3	\$1	\$4
Non-profit education services	\$0	\$0	\$0	\$0	\$0
Hospitals and government nursing and residential care facilities	\$0	\$19	\$19	\$6	\$24
Universities and government education services	\$2	\$72	\$74	\$23	\$97
Other municipal government services	\$0	\$145	\$145	\$46	\$191
Other provincial and territorial government services	\$1	\$18	\$19	\$6	\$24
Other federal government services	\$0	\$37	\$37	\$11	\$48
Total	\$42,683	\$20,393	\$63,076	\$18,392	\$81,468




SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact model

3.4 GOVERNMENT REVENUES – CONSTRUCTION IMPACT

Given the considerable capital costs required to finance the construction of Sports City, the proposed development is projected to make a substantial contribution to federal, provincial, and municipal revenues during the construction period. The tax revenues produced by the economic output model are grouped to distinguish expenditure taxes, indirect taxes on production, indirect taxes on products, income taxes, and other government transfers or natural resource royalties. The projected government revenues are provided in detail in Figure 3-6.

FIGURE 3-6: GOVERNMENT TAX REVENUES

	Direct	Indirect	Total Open	Induced	Total Closed
					
FEDERAL REVENUES	\$13,657,226	\$8,817,874	\$22,475,100	\$9,713,038	\$32,188,138
Indirect Taxes on Production	\$3,948	\$4,314	\$8,263	\$2,380	\$10,643
Indirect Taxes on Products	\$2,114,083	\$2,634,674	\$4,748,757	\$1,420,260	\$6,169,017
<i>Federal Gasoline Tax</i>	\$1,578,510	\$1,777,652	\$3,356,162	\$1,087,593	\$4,443,755
<i>Federal Excise Tax</i>	\$0	\$227	\$227	\$65	\$292
<i>Federal Excise Duties</i>	\$67	\$73,146	\$73,213	\$26,695	\$99,908
<i>Federal Air transportation Tax</i>	\$35,493	\$175,095	\$210,588	\$77,396	\$287,984
<i>Federal Canadian Ownership Charge</i>	\$37,157	\$32,929	\$70,086	\$21,050	\$91,136
<i>Federal Goods and Services Tax</i>	\$462,855	\$575,625	\$1,038,481	\$207,461	\$1,245,942
Income Taxes	\$8,573,944	\$4,498,219	\$13,072,163	\$6,450,503	\$19,522,666
<i>Personal</i>	\$6,662,541	\$2,822,961	\$9,485,502	\$3,876,445	\$13,361,947
<i>Corporate</i>	\$1,911,403	\$1,675,258	\$3,586,661	\$2,574,058	\$6,160,720
Other Transfers to Government	\$2,965,250	\$1,680,666	\$4,645,916	\$1,839,895	\$6,485,811
<i>CPP</i>	\$2,089,393	\$1,184,242	\$3,273,635	\$1,296,438	\$4,570,073
<i>EI</i>	\$875,857	\$496,425	\$1,372,281	\$543,456	\$1,915,738
					
PROVINCIAL REVENUES	\$6,080,524	\$4,911,667	\$10,992,191	\$4,462,440	\$15,454,631
Expenditure Taxes	\$0	\$0	\$0	\$0	\$0
Indirect Taxes on Production	\$277,845	\$303,604	\$581,448	\$167,496	\$748,944
<i>Provincial Motor vehicle licences and permits</i>	\$18,911	\$20,664	\$39,575	\$11,400	\$50,975
<i>Provincial Other licences, fees and permits</i>	\$14,027	\$15,328	\$29,355	\$8,456	\$37,811
<i>Provincial Miscellaneous taxes on natural resources</i>	\$49,355	\$53,931	\$103,286	\$29,753	\$133,040
<i>Provincial Real property tax</i>	\$147,443	\$161,112	\$308,555	\$88,884	\$397,439
<i>Provincial Miscellaneous</i>	\$48,108	\$52,569	\$100,677	\$29,002	\$129,679
Indirect Taxes on Products	\$1,840,044	\$2,413,785	\$4,253,829	\$1,390,198	\$5,644,027
<i>Provincial Gallonage Tax</i>	\$0	\$0	\$0	\$0	\$0
<i>Provincial Trading Profits on Liquor and Lottery</i>	\$209	\$227,445	\$227,654	\$83,005	\$310,659
<i>Provincial Gasoline Tax</i>	\$1,795,634	\$1,962,629	\$3,758,264	\$1,209,876	\$4,968,139
<i>Provincial Amusement Tax</i>	\$0	\$0	\$0	\$0	\$0
<i>Provincial Retail Sales Tax (including liquor and tobacco)</i>	\$44,201	\$223,711	\$267,912	\$97,317	\$365,228
<i>Provincial Harmonized Sales Tax</i>	\$0	\$0	\$0	\$0	\$0
Income Taxes	\$3,962,635	\$2,041,956	\$6,004,591	\$2,889,188	\$8,893,779
<i>Personal</i>	\$3,206,612	\$1,379,336	\$4,585,948	\$1,871,063	\$6,457,011
<i>Corporate</i>	\$756,023	\$662,620	\$1,418,643	\$1,018,125	\$2,436,768
Natural Resource Royalties	\$0	\$152,322	\$152,322	\$15,559	\$167,881
					
LOCAL REVENUES	\$520,881	\$569,172	\$1,090,052	\$314,007	\$1,404,060
Indirect Taxes on Production	\$520,881	\$569,172	\$1,090,052	\$314,007	\$1,404,060
<i>Local Licences, fees and permits, developers fees</i>	\$20,366	\$22,254	\$42,619	\$12,277	\$54,896
<i>Local Real and personal property tax</i>	\$438,587	\$479,249	\$917,836	\$264,397	\$1,182,233
<i>Local Business tax</i>	\$28,159	\$30,769	\$58,928	\$16,975	\$75,903
<i>Local Developer's fees</i>	\$33,769	\$36,900	\$70,670	\$20,358	\$91,027
LOCAL REVENUES	\$20,258,631	\$14,298,713	\$34,557,343	\$14,489,486	\$49,046,829

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact analysis

As outlined in to Figure 3-6 the construction of Sports City is expected to generate approximately \$20 million of direct tax revenues, and \$14 million of indirect tax revenues, in addition to another \$15 million of induced tax revenues. ***Between all three levels of government collectively, the construction of the Sports City is expected to produce approximately \$49 million in government revenues.***

While the majority of government revenues will be directed to the federal government, a considerable portion would be directed to the provincial government in Alberta, and the municipal government in St. Albert. The federal government would account for a 65.6% share of the total government revenues, while the provincial and municipal governments would respectively account for a 31.5% share, and a 2.9% share.

3.5 SUMMARY – CONSTRUCTION IMPACTS

Based on the results of the Alberta Finance and Enterprise Economic Output Model, there are projected to be a number of positive economic impacts related to the construction of Sports City, when all of the direct, indirect and induced economic impacts are considered. While the construction of Sports City is expected to have a major positive impact on the local economy, the ongoing future operations of the proposed development also have the potential to produce a variety of positive economic impacts for the City of St. Albert, and the province as a whole. The recurring economic impacts created by the ongoing future operation of Sports City are analyzed in detail in the following sections.

4 RECURRING ECONOMIC IMPACT

While Section 3 examined the one time economic impacts created by the construction of the proposed development, this section analyzes the **recurring economic impacts** generated by the ongoing operation of Sports City. Once constructed, the on-going operation of the Sports City facility will yield on-going, or *recurring* economic impacts year over year. Given that some of the components of the development will be operated independently, our analysis of the operating impacts of the proposed development does include the operating revenues from every component that would be constructed as part of Sports City, instead rental income is collected from these properties and is accounted for in our economic impact analysis. urbanMetrics analysis of the economic impacts of ongoing operations of Sports City focuses on the 30 acre component of the development and considers the following sources of revenue:

- Academy/private school operations;
- Commercial property lease agreements;
- Sports surface rentals; and,
- Sports City entertainment properties (movie theatre, play structure, ballpark complex).

Figure 4-1 summarizes the economic impacts of the ongoing operation of Sports City.

FIGURE 4-1: SUMMARY OF ECONOMIC IMPACTS

	Direct	Indirect	Total Open	Induced	Total Closed
Output	\$47,333,600	\$8,202,583	\$55,536,183	\$15,009,827	\$70,546,010
Material Inputs	\$34,115,417	\$4,427,080	\$38,542,497	\$3,339,624	\$41,882,121
GDP at Basic Prices	\$13,218,183	\$3,775,504	\$16,993,686	\$4,298,471	\$21,292,157
Labour Income	\$7,538,851	\$2,263,303	\$9,802,153	\$2,467,500	\$12,269,653
Employment (2010)	146.5	35.9	182.4	41.7	224.1
Government Revenues	\$5,012,636	\$6,070,973	\$11,083,609	\$2,064,637	\$13,148,246
Federal Government	\$2,957,724	\$4,269,493	\$7,227,218	\$1,340,467	\$8,567,685
Alberta Government	\$1,590,307	\$1,503,383	\$3,093,690	\$578,805	\$3,672,495
Local Governments	\$464,605	\$298,097	\$762,701	\$145,365	\$908,067

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact analysis

The ongoing operation of Sports City is expected to directly contribute approximately \$47 million to the local economy, in addition to \$8 million of indirect production, and \$14 million of induced production. **Overall, the proposed development is expected to contribute approximately \$70 million to the economy during each full year of operation.**

In addition to the direct economic impact of the proposed development, the ongoing operation of Sports City has the potential to generate a variety of positive spin-off effects in other industry categories, further strengthening the vitality of the local economy. The ongoing operation of Sports City is projected to have the largest indirect economic impact in the arts, entertainment and recreation industry; the finance, insurance, real estate, rental and leasing industry; the professional, scientific and technical services industry; administrative and support services industry; the travel, entertainment, advertising, and promotion industry; and, the oil and gas extraction industry. Given the variety of economic sectors that would be supported by Sports City, the operation of the proposed development has the potential to make an important contribution to the economy as a whole, by providing increased diversity and stability in the local market.

Figure 4-2 details the direct, indirect and induced impacts on gross production created by the ongoing operation of St. Albert Sport City. The direct economic impact related to the operation of the proposed development is concentrated in the educational services category.

FIGURE 4-2: GROSS PRODUCTION (\$000)

MEDIUM AGGREGATION	Direct	Indirect	Total Open	Induced	Total Closed
Crop and animal production	\$0	\$46	\$46	\$2	\$48
Forestry and logging	\$0	\$2	\$2	\$1	\$3
Fishing, hunting and trapping	\$0	\$0	\$0	\$0	\$0
Support activities for agriculture and forestry	\$0	\$2	\$2	\$1	\$3
Oil and gas extraction	\$0	\$453	\$453	\$62	\$515
Mining (except oil and gas extraction)	\$0	\$78	\$78	\$23	\$101
Support activities for mining and oil and gas extraction	\$0	\$34	\$34	\$15	\$50
Electric power generation, transmission and distribution	\$0	\$124	\$124	\$153	\$276
Natural gas distribution, water, sewage and other systems	\$0	\$66	\$66	\$76	\$142
Construction	\$0	\$166	\$166	\$86	\$251
Food manufacturing	\$0	\$74	\$74	\$10	\$84
Beverage and tobacco product manufacturing	\$0	\$8	\$8	-\$1	\$7
Textile and textile product mills	\$0	\$2	\$2	\$1	\$3
Clothing manufacturing	\$0	\$0	\$0	\$0	\$0
Leather and allied product manufacturing	\$0	\$0	\$0	\$0	\$0
Wood product manufacturing	\$0	\$12	\$12	\$4	\$15
Paper manufacturing	\$0	\$18	\$18	\$4	\$22
Printing and related support activities	\$0	\$87	\$87	\$29	\$116
Petroleum and coal products manufacturing	\$0	\$188	\$188	\$4	\$192
Chemical manufacturing	\$0	\$80	\$80	\$8	\$89
Plastics and rubber products manufacturing	\$0	\$23	\$23	\$6	\$29
Non-metallic mineral product manufacturing	\$0	\$13	\$13	\$3	\$17
Primary metal manufacturing	\$0	\$3	\$3	\$1	\$3
Fabricated metal products manufacturing	\$0	\$27	\$27	\$9	\$36
Machinery manufacturing	\$0	\$27	\$27	\$8	\$35
Computer and electronic product manufacturing	\$0	\$4	\$4	\$1	\$5
Electrical equipment, appliance and component manufacturing	\$0	\$3	\$3	\$1	\$4
Transportation equipment manufacturing	\$0	\$2	\$2	\$1	\$3
Furniture and related product manufacturing	\$0	\$1	\$1	\$0	\$1
Miscellaneous manufacturing	\$0	\$22	\$22	\$8	\$30
Wholesale trade	\$0	\$292	\$292	\$143	\$435
Retail trade	\$0	\$186	\$186	\$155	\$341
Truck transportation	\$0	\$70	\$70	\$33	\$103
Transit and ground passenger transportation	\$0	\$16	\$16	\$8	\$24
Pipeline transportation	\$0	\$25	\$25	\$10	\$35
Other transportation	\$0	\$140	\$140	\$41	\$181
Postal service and couriers and messengers	\$0	\$146	\$146	\$68	\$214
Warehousing and storage	\$0	\$6	\$6	\$5	\$11
Motion picture and sound recording industries	\$0	\$6	\$6	\$1	\$7
Broadcasting and telecommunications	\$0	\$335	\$335	\$116	\$451
Publishing industries, information services and data processing services	\$0	\$281	\$281	\$88	\$370
Finance, insurance, real estate and rental and leasing	\$0	\$1,451	\$1,451	\$3,915	\$5,366
Professional, scientific and technical services	\$0	\$980	\$980	\$666	\$1,646
Administrative and support services	\$0	\$192	\$192	\$1,285	\$1,477
Waste management and remediation services	\$0	\$233	\$233	\$170	\$403
Educational services	\$25,671	\$36	\$25,707	\$5,638	\$31,345
Health care and social assistance	\$0	\$18	\$18	\$10	\$27
Arts, entertainment and recreation	\$21,663	\$38	\$21,701	\$1,823	\$23,524
Accommodation and food services	\$0	\$167	\$167	\$67	\$234
Repair and maintenance	\$0	\$68	\$68	\$66	\$134
Grant-making, civic, and professional and similar organizations	\$0	\$39	\$39	\$42	\$81
Personal and laundry services and private households	\$0	\$13	\$13	\$11	\$24
Operating, office, cafeteria and laboratory supplies	\$0	\$504	\$504	\$0	\$504
Travel, entertainment, advertising and promotion	\$0	\$1,143	\$1,143	\$0	\$1,143
Transportation margins	\$0	\$53	\$53	\$0	\$53
Non-profit institutions serving households (excluding education)	\$0	\$3	\$3	\$3	\$7
Non-profit education services	\$0	\$0	\$0	\$0	\$0
Hospitals and government nursing and residential care facilities	\$0	\$9	\$9	\$7	\$16
Universities and government education services	\$0	\$16	\$16	\$16	\$32
Other municipal government services	\$0	\$78	\$78	\$68	\$146
Other provincial and territorial government services	\$0	\$40	\$40	\$9	\$49
Other federal government services	\$0	\$52	\$52	\$32	\$83
Total	\$47,334	\$8,203	\$55,536	\$15,010	\$70,546

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact model

4.1 GROSS DOMESTIC PRODUCT – ONGOING OPERATIONS

Figure 4-3 details the direct, indirect and induced impacts on gross domestic product (at basic prices) created by the ongoing operation of St. Albert Sport City. Given that the proposed development concept includes a school/academy programs, the gross domestic product that is directly related to the ongoing operation of Sports City is concentrated in educational services category.

As discussed in the previous section, the ongoing operation of Sports City will generate substantial spin-off effects on other industries, in addition to the gross domestic product directly related to the proposed development.

The largest indirect contribution to the gross domestic product attributed to the ongoing operations of Sports City would be concentrated in the arts, entertainment, and recreation industry; the finance, insurance, real estate, rental and leasing industry; the professional, scientific and technical services industry; administrative and support services industry; and, the oil and gas extraction industry. ***Overall, the ongoing operation of Sports City is expected to contribute more than \$21 million towards gross domestic product measured at basic prices.***

FIGURE 4-3 GROSS DOMESTIC PRODUCT AT BASIC PRICES (\$'000)

MEDIUM AGGREGATION	Direct	Indirect	Total Open	Induced	Total Closed
Crop and animal production	\$0	\$12	\$12	\$1	\$13
Forestry and logging	\$0	\$1	\$1	\$0	\$1
Fishing, hunting and trapping	\$0	\$0	\$0	\$0	\$0
Support activities for agriculture and forestry	\$0	\$1	\$1	\$0	\$1
Oil and gas extraction	\$0	\$341	\$341	\$35	\$376
Mining (except oil and gas extraction)	\$0	\$50	\$50	\$13	\$62
Support activities for mining and oil and gas extraction	\$0	\$22	\$22	\$9	\$30
Electric power generation, transmission and distribution	\$0	\$84	\$84	\$86	\$170
Natural gas distribution, water, sewage and other systems	\$0	\$46	\$46	\$43	\$89
Construction	\$0	\$89	\$89	\$48	\$137
Food manufacturing	\$0	\$16	\$16	\$6	\$22
Beverage and tobacco product manufacturing	\$0	\$4	\$4	-\$1	\$3
Textile and textile product mills	\$0	\$1	\$1	\$0	\$1
Clothing manufacturing	\$0	\$0	\$0	\$0	\$0
Leather and allied product manufacturing	\$0	\$0	\$0	\$0	\$0
Wood product manufacturing	\$0	\$5	\$5	\$2	\$7
Paper manufacturing	\$0	\$7	\$7	\$2	\$10
Printing and related support activities	\$0	\$42	\$42	\$16	\$58
Petroleum and coal products manufacturing	\$0	\$21	\$21	\$2	\$23
Chemical manufacturing	\$0	\$16	\$16	\$5	\$21
Plastics and rubber products manufacturing	\$0	\$9	\$9	\$4	\$13
Non-metallic mineral product manufacturing	\$0	\$6	\$6	\$2	\$8
Primary metal manufacturing	\$0	\$1	\$1	\$0	\$1
Fabricated metal products manufacturing	\$0	\$12	\$12	\$5	\$17
Machinery manufacturing	\$0	\$11	\$11	\$4	\$16
Computer and electronic product manufacturing	\$0	\$2	\$2	\$1	\$2
Electrical equipment, appliance and component manufacturing	\$0	\$1	\$1	\$1	\$2
Transportation equipment manufacturing	\$0	\$1	\$1	\$0	\$1
Furniture and related product manufacturing	\$0	\$0	\$0	\$0	\$1
Miscellaneous manufacturing	\$0	\$12	\$12	\$4	\$17
Wholesale trade	\$0	\$171	\$171	\$80	\$251
Retail trade	\$0	\$118	\$118	\$87	\$205
Truck transportation	\$0	\$39	\$39	\$18	\$57
Transit and ground passenger transportation	\$0	\$10	\$10	\$5	\$14
Pipeline transportation	\$0	\$21	\$21	\$5	\$26
Other transportation	\$0	\$57	\$57	\$23	\$80
Postal service and couriers and messengers	\$0	\$81	\$81	\$38	\$119
Warehousing and storage	\$0	\$5	\$5	\$3	\$8
Motion picture and sound recording industries	\$0	\$3	\$3	\$1	\$3
Broadcasting and telecommunications	\$0	\$223	\$223	\$65	\$288
Publishing industries, information services and data processing services	\$0	\$189	\$189	\$50	\$239
Finance, insurance, real estate and rental and leasing	\$0	\$831	\$831	\$2,203	\$3,034
Professional, scientific and technical services	\$0	\$571	\$571	\$375	\$946
Administrative and support services	\$0	\$124	\$124	\$723	\$847
Waste management and remediation services	\$0	\$168	\$168	\$96	\$263
Educational services	\$9,083	\$31	\$9,114	\$16	\$9,129
Health care and social assistance	\$0	\$14	\$14	\$5	\$19
Arts, entertainment and recreation	\$4,135	\$20	\$4,155	\$34	\$4,190
Accommodation and food services	\$0	\$89	\$89	\$38	\$127
Repair and maintenance	\$0	\$44	\$44	\$37	\$81
Grant-making, civic, and professional and similar organizations	\$0	\$26	\$26	\$23	\$49
Personal and laundry services and private households	\$0	\$9	\$9	\$6	\$15
Operating, office, cafeteria and laboratory supplies	\$0	\$0	\$0	\$0	\$0
Travel, entertainment, advertising and promotion	\$0	\$0	\$0	\$0	\$0
Transportation margins	\$0	\$0	\$0	\$0	\$0
Non-profit institutions serving households (excluding education)	\$0	\$2	\$2	\$2	\$4
Non-profit education services	\$0	\$0	\$0	\$0	\$0
Hospitals and government nursing and residential care facilities	\$0	\$6	\$6	\$4	\$10
Universities and government education services	\$0	\$12	\$12	\$9	\$21
Other municipal government services	\$0	\$53	\$53	\$38	\$91
Other provincial and territorial government services	\$0	\$12	\$12	\$5	\$17
Other federal government services	\$0	\$37	\$37	\$18	\$54
Total	\$13,218	\$3,776	\$16,994	\$4,298	\$21,292

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact model

4.2 EMPLOYMENT – ONGOING OPERATIONS

Sports City is expected to indirectly generate employment for a number of export-oriented industries and induce further positive economic impacts in the local community. In total, ***the ongoing operation of Sports City is projected to generate approximately 224 jobs***, when direct, indirect and induced employment attributed to the development is considered.

It is important reiterate that the Sports City concept is very much an export-oriented business. The academy programs, along with the entertainment and recreational facilities located on-site, are expected to draw students and visitors from outside the region and outside the province. In economic terms, these products/services that are provided by the various components of Sports City for non-local residents and athletes visiting the facility ***are*** export-oriented, even though they are consumed locally. This is an important distinction that needs to be considered.

Figure 4-4 details the distribution of employment that is expected to be generated from the ongoing operation of the proposed development. A detailed chart is provided in Appendix C, which illustrates the number of full time jobs that are projected to be induced, directly, or indirectly created by the construction of the proposed development.

FIGURE 4-4: EMPLOYMENT BY INDUSTRY (JOBS)

MEDIUM AGGREGATION	Direct	Indirect	Total Open	Induced	Total Closed
Crop and animal production	0.0	0.2	0.2	0.0	0.2
Forestry and logging	0.0	0.0	0.0	0.0	0.0
Fishing, hunting and trapping	0.0	0.0	0.0	0.0	0.0
Support activities for agriculture and forestry	0.0	0.0	0.0	0.0	0.0
Oil and gas extraction	0.0	0.3	0.3	0.3	0.7
Mining (except oil and gas extraction)	0.0	0.2	0.2	0.1	0.3
Support activities for mining and oil and gas extraction	0.0	0.2	0.2	0.1	0.2
Electric power generation, transmission and distribution	0.0	0.1	0.1	0.8	1.0
Natural gas distribution, water, sewage and other systems	0.0	0.1	0.1	0.4	0.5
Construction	0.0	0.8	0.8	0.5	1.3
Food manufacturing	0.0	0.2	0.2	0.1	0.2
Beverage and tobacco product manufacturing	0.0	0.0	0.0	0.0	0.0
Textile and textile product mills	0.0	0.0	0.0	0.0	0.0
Clothing manufacturing	0.0	0.0	0.0	0.0	0.0
Leather and allied product manufacturing	0.0	0.0	0.0	0.0	0.0
Wood product manufacturing	0.0	0.0	0.0	0.0	0.1
Paper manufacturing	0.0	0.1	0.1	0.0	0.1
Printing and related support activities	0.0	0.4	0.4	0.2	0.5
Petroleum and coal products manufacturing	0.0	0.0	0.0	0.0	0.1
Chemical manufacturing	0.0	0.1	0.1	0.0	0.1
Plastics and rubber products manufacturing	0.0	0.1	0.1	0.0	0.1
Non-metallic mineral product manufacturing	0.0	0.0	0.0	0.0	0.1
Primary metal manufacturing	0.0	0.0	0.0	0.0	0.0
Fabricated metal products manufacturing	0.0	0.1	0.1	0.1	0.2
Machinery manufacturing	0.0	0.1	0.1	0.0	0.1
Computer and electronic product manufacturing	0.0	0.0	0.0	0.0	0.0
Electrical equipment, appliance and component manufacturing	0.0	0.0	0.0	0.0	0.0
Transportation equipment manufacturing	0.0	0.0	0.0	0.0	0.0
Furniture and related product manufacturing	0.0	0.0	0.0	0.0	0.0
Miscellaneous manufacturing	0.0	0.2	0.2	0.0	0.2
Wholesale trade	0.0	1.5	1.5	0.8	2.3
Retail trade	0.0	2.1	2.1	0.8	3.0
Truck transportation	0.0	0.4	0.4	0.2	0.6
Transit and ground passenger transportation	0.0	0.2	0.2	0.0	0.2
Pipeline transportation	0.0	0.0	0.0	0.1	0.1
Other transportation	0.0	0.5	0.5	0.2	0.7
Postal service and couriers and messengers	0.0	1.7	1.7	0.4	2.1
Warehousing and storage	0.0	0.1	0.1	0.0	0.1
Motion picture and sound recording industries	0.0	0.0	0.0	0.0	0.0
Broadcasting and telecommunications	0.0	1.4	1.4	0.6	2.1
Publishing industries, information services and data processing services	0.0	1.3	1.3	0.5	1.8
Finance, insurance, real estate and rental and leasing	0.0	5.3	5.3	21.4	26.6
Professional, scientific and technical services	0.0	6.8	6.8	3.6	10.4
Administrative and support services	0.0	2.9	2.9	7.0	9.9
Waste management and remediation services	0.0	2.2	2.2	0.9	3.2
Educational services	100.0	0.9	100.9	0.2	101.0
Health care and social assistance	0.0	0.1	0.1	0.1	0.2
Arts, entertainment and recreation	46.5	0.6	47.1	0.3	47.5
Accommodation and food services	0.0	1.8	1.8	0.4	2.1
Repair and maintenance	0.0	0.8	0.8	0.4	1.2
Grant-making, civic, and professional and similar organizations	0.0	0.4	0.4	0.2	0.7
Personal and laundry services and private households	0.0	0.2	0.2	0.1	0.3
Operating, office, cafeteria and laboratory supplies	0.0	0.0	0.0	0.0	0.0
Travel, entertainment, advertising and promotion	0.0	0.0	0.0	0.0	0.0
Transportation margins	0.0	0.0	0.0	0.0	0.0
Non-profit institutions serving households (excluding education)	0.0	0.0	0.0	0.0	0.1
Non-profit education services	0.0	0.0	0.0	0.0	0.0
Hospitals and government nursing and residential care facilities	0.0	0.1	0.1	0.0	0.1
Universities and government education services	0.0	0.1	0.1	0.1	0.2
Other municipal government services	0.0	0.5	0.5	0.4	0.8
Other provincial and territorial government services	0.0	0.1	0.1	0.1	0.2
Other federal government services	0.0	0.3	0.3	0.2	0.5
Total	146.5	35.9	182.4	41.7	224.1

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact model

4.3 LABOUR INCOME – ONGOING OPERATIONS

The ongoing operation of Sports City is projected to create approximately \$12 million in labour income, when all direct, indirect and induced economic impacts attributed to the 224 jobs created by the proposed development are considered. Figure 4-5 details the labour income that is expected to be generated during the construction of the proposed development.

The majority of the labour income that is expected to be induced and directly or indirectly generated by the construction of Sports City is concentrated in the educational service and arts, entertainment, and recreation sectors. Given the level of employment created by Sports City, the ongoing operation of the facility is expected to generate millions of dollars in labour income in a variety of other economic sectors.

Outside of the significant contribution towards gross production, the economic output model illustrated that the ongoing operation of St. Albert Sport City would generate a considerable number of jobs and additional labour income in the local area, providing increased economic stability for the City of St. Albert and the province as a whole.

FIGURE 4-5: LABOUR INCOME BY INDUSTRY (JOBS)

MEDIUM AGGREGATION	Direct	Indirect	Total Open	Induced	Total Closed
Crop and animal production	\$0	\$2	\$2	\$1	\$3
Forestry and logging	\$0	\$1	\$1	\$0	\$1
Fishing, hunting and trapping	\$0	\$0	\$0	\$0	\$0
Support activities for agriculture and forestry	\$0	\$1	\$1	\$0	\$1
Oil and gas extraction	\$0	\$48	\$48	\$20	\$67
Mining (except oil and gas extraction)	\$0	\$24	\$24	\$7	\$31
Support activities for mining and oil and gas extraction	\$0	\$17	\$17	\$5	\$22
Electric power generation, transmission and distribution	\$0	\$18	\$18	\$49	\$67
Natural gas distribution, water, sewage and other systems	\$0	\$10	\$10	\$25	\$35
Construction	\$0	\$68	\$68	\$28	\$96
Food manufacturing	\$0	\$10	\$10	\$3	\$13
Beverage and tobacco product manufacturing	\$0	\$1	\$1	\$0	\$1
Textile and textile product mills	\$0	\$1	\$1	\$0	\$1
Clothing manufacturing	\$0	\$0	\$0	\$0	\$0
Leather and allied product manufacturing	\$0	\$0	\$0	\$0	\$0
Wood product manufacturing	\$0	\$3	\$3	\$1	\$4
Paper manufacturing	\$0	\$4	\$4	\$1	\$5
Printing and related support activities	\$0	\$28	\$28	\$9	\$37
Petroleum and coal products manufacturing	\$0	\$4	\$4	\$1	\$6
Chemical manufacturing	\$0	\$6	\$6	\$3	\$9
Plastics and rubber products manufacturing	\$0	\$6	\$6	\$2	\$8
Non-metallic mineral product manufacturing	\$0	\$3	\$3	\$1	\$4
Primary metal manufacturing	\$0	\$1	\$1	\$0	\$1
Fabricated metal products manufacturing	\$0	\$9	\$9	\$3	\$12
Machinery manufacturing	\$0	\$7	\$7	\$3	\$10
Computer and electronic product manufacturing	\$0	\$1	\$1	\$0	\$2
Electrical equipment, appliance and component manufacturing	\$0	\$1	\$1	\$0	\$2
Transportation equipment manufacturing	\$0	\$1	\$1	\$0	\$1
Furniture and related product manufacturing	\$0	\$0	\$0	\$0	\$0
Miscellaneous manufacturing	\$0	\$8	\$8	\$3	\$10
Wholesale trade	\$0	\$116	\$116	\$46	\$162
Retail trade	\$0	\$91	\$91	\$50	\$142
Truck transportation	\$0	\$31	\$31	\$11	\$42
Transit and ground passenger transportation	\$0	\$8	\$8	\$3	\$11
Pipeline transportation	\$0	\$4	\$4	\$3	\$7
Other transportation	\$0	\$37	\$37	\$13	\$50
Postal service and couriers and messengers	\$0	\$63	\$63	\$22	\$85
Warehousing and storage	\$0	\$4	\$4	\$2	\$6
Motion picture and sound recording industries	\$0	\$1	\$1	\$0	\$1
Broadcasting and telecommunications	\$0	\$78	\$78	\$37	\$116
Publishing industries, information services and data processing services	\$0	\$94	\$94	\$29	\$123
Finance, insurance, real estate and rental and leasing	\$0	\$458	\$458	\$1,265	\$1,723
Professional, scientific and technical services	\$0	\$474	\$474	\$215	\$689
Administrative and support services	\$0	\$109	\$109	\$415	\$525
Waste management and remediation services	\$0	\$137	\$137	\$55	\$192
Educational services	\$5,753	\$26	\$5,779	\$9	\$5,788
Health care and social assistance	\$0	\$11	\$11	\$3	\$14
Arts, entertainment and recreation	\$1,786	\$16	\$1,802	\$20	\$1,822
Accommodation and food services	\$0	\$62	\$62	\$22	\$83
Repair and maintenance	\$0	\$37	\$37	\$21	\$58
Grant-making, civic, and professional and similar organizations	\$0	\$23	\$23	\$13	\$37
Personal and laundry services and private households	\$0	\$6	\$6	\$3	\$9
Operating, office, cafeteria and laboratory supplies	\$0	\$0	\$0	\$0	\$0
Travel, entertainment, advertising and promotion	\$0	\$0	\$0	\$0	\$0
Transportation margins	\$0	\$0	\$0	\$0	\$0
Non-profit institutions serving households (excluding education)	\$0	\$2	\$2	\$1	\$3
Non-profit education services	\$0	\$0	\$0	\$0	\$0
Hospitals and government nursing and residential care facilities	\$0	\$5	\$5	\$2	\$8
Universities and government education services	\$0	\$10	\$10	\$5	\$15
Other municipal government services	\$0	\$37	\$37	\$22	\$58
Other provincial and territorial government services	\$0	\$9	\$9	\$3	\$12
Other federal government services	\$0	\$31	\$31	\$10	\$42
Total	\$7,539	\$2,263	\$9,802	\$2,467	\$12,270



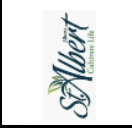
SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact model

4.4 GOVERNMENT REVENUES – ONGOING OPERATIONS

Given the size and scale of Sports City, the operation of the proposed development is projected to make a substantial contribution to federal, provincial, and municipal revenues. The tax revenues produced by the economic output model are divided to distinguish expenditure taxes, indirect taxes on production, indirect taxes on products, income taxes, and other government transfers or natural resource royalties. The projected government revenues related to the ongoing operation of Sports City are provided in detail in Figure 4-6.

FIGURE 4-6: GOVERNMENT TAX REVENUES

	Direct	Indirect	Total Open	Induced	Total Closed	
	FEDERAL REVENUES	\$2,957,724	\$4,269,493	\$7,227,218	\$1,340,467	\$8,567,685
	Expenditure Taxes	\$0	\$0	\$0	\$0	\$0
	Indirect Taxes on Production	\$3,522	\$2,260	\$5,781	\$1,102	\$6,883
	Indirect Taxes on Products	\$136,540	\$1,960,107	\$2,096,646	\$510,285	\$2,606,931
	Federal Gasoline Tax	\$41,652	\$397,018	\$438,670	\$141,232	\$579,902
	Federal Excise Tax	\$0	\$38	\$38	\$11	\$48
	Federal Excise Duties	\$88,645	\$25,104	\$113,748	\$16,444	\$130,192
	Federal Air transportation Tax	\$6,243	\$55,158	\$61,401	\$19,050	\$80,451
	Federal Canadian Ownership Charge	\$0	\$21,745	\$21,745	\$6,533	\$28,278
	Federal Goods and Services Tax	\$0	\$1,461,045	\$1,461,045	\$327,015	\$1,788,060
	Income Taxes	\$2,286,730	\$1,602,759	\$3,889,489	\$601,711	\$4,491,200
	Personal	\$771,419	\$1,061,421	\$1,832,840	\$396,493	\$2,229,333
	Corporate	\$1,515,311	\$541,338	\$2,056,649	\$205,218	\$2,261,867
	Other Transfers to Government	\$530,933	\$704,368	\$1,235,300	\$227,370	\$1,462,670
	CPP	\$374,109	\$496,316	\$870,425	\$160,211	\$1,030,636
	EI	\$156,824	\$208,052	\$364,875	\$67,159	\$432,034
	PROVINCIAL REVENUES	\$1,590,307	\$1,503,383	\$3,093,690	\$578,805	\$3,672,495
	Expenditure Taxes	\$0	\$0	\$0	\$0	\$0
	Indirect Taxes on Production	\$247,826	\$159,009	\$406,835	\$77,540	\$484,375
	Provincial Motor vehicle licences and permits	\$16,868	\$10,823	\$27,690	\$5,278	\$32,968
	Provincial Other licences, fees and permits	\$12,512	\$8,028	\$20,540	\$3,915	\$24,454
	Provincial Miscellaneous taxes on natural resources	\$44,023	\$28,246	\$72,269	\$13,774	\$86,043
	Provincial Real property tax	\$131,513	\$84,380	\$215,893	\$41,148	\$257,041
	Provincial Miscellaneous	\$42,911	\$27,532	\$70,443	\$13,426	\$83,869
	Indirect Taxes on Products	\$321,112	\$575,312	\$896,424	\$224,225	\$1,120,649
	Provincial Gallonage Tax	\$0	\$0	\$0	\$0	\$0
	Provincial Trading Profits on Liquor and Lottery	\$275,437	\$78,055	\$353,492	\$51,112	\$404,604
	Provincial Gasoline Tax	\$37,878	\$427,351	\$465,228	\$149,183	\$614,412
	Provincial Amusement Tax	\$0	\$0	\$0	\$0	\$0
	Provincial Retail Sales Tax (including liquor and tobacco)	\$7,797	\$69,907	\$77,704	\$23,930	\$101,634
	Provincial Harmonized Sales Tax	\$0	\$0	\$0	\$0	\$0
	Income Taxes	\$1,021,369	\$723,375	\$1,744,744	\$272,344	\$2,017,088
	Personal	\$422,014	\$509,258	\$931,272	\$191,174	\$1,122,445
	Corporate	\$599,355	\$214,117	\$813,473	\$81,170	\$894,643
	Natural Resource Royalties	\$0	\$45,687	\$45,687	\$4,695	\$50,382
	LOCAL REVENUES	\$464,605	\$298,097	\$762,701	\$145,365	\$908,067
	Indirect Taxes on Production	\$464,605	\$298,097	\$762,701	\$145,365	\$908,067
	Local Licences, fees and permits, developers fees	\$18,165	\$11,655	\$29,820	\$5,684	\$35,504
	Local Real and personal property tax	\$391,202	\$251,001	\$642,203	\$122,399	\$764,602
	Local Business tax	\$25,116	\$16,115	\$41,231	\$7,858	\$49,090
	Local Developer's fees	\$30,121	\$19,326	\$49,447	\$9,424	\$58,871
	TOTAL REVENUES	\$5,012,636	\$6,070,973	\$11,083,609	\$2,064,637	\$13,148,246

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact analysis

According to Figure 4-6, the future operation of Sports City is expected to generate approximately \$5.0 million in direct tax revenues, and \$6.1 million of indirect tax revenues, along with another \$2.1 million of induced tax revenues each year. **Between all three levels of**

government, the operation of the Sports City is expected to produce approximately \$13 million in government revenues⁵.

Like the economic impact during the construction period, the majority of government revenues will be directed to the federal government, while a portion would be directed to the provincial government in Alberta, and the municipal government in St. Albert. The federal government would account for a 65.2% share of the total government revenues, while the provincial and municipal governments would account for 27.9%, and 6.9% respectively.

4.5 SUMMARY

The results of our economic impact analysis indicate that both the construction and the ongoing operation of Sports City will make a significant contribution to the economic strength and competitiveness of the local community, when all of the direct, indirect and induced economic impacts are considered.

Sports City is expected to have a major positive impact on the local economy, during both the construction period and during the ongoing future operations of the proposed development.

⁵ Like the construction impacts, it is important to note that the Alberta Finance and Enterprise economic impact model underestimates municipal tax revenues from the ongoing operation of the proposed development. Under the proposed development concept, the Sports City project would generate more than \$4.0 million dollars in property tax revenue each year, which in itself is significantly greater than the \$900,000 of direct tax benefits shown in Figure 4-6.

4.6 STUDENT EXPENDITURES

With the large number of students attracted to the academy program at Sports City, there will undoubtedly be an increase in expenditures made within the local economy at retailers, restaurants, and other service providers throughout the City of St. Albert. In total, there are projected to be 1,542 students enrolled in the various academy programs.

To determine economic impact of off-campus expenditures made by students attending the Sports City academy programs, urbanMetrics has analyzed typical student expenditure patterns in Canada, based on the *Students as Consumers Survey*, which was published in February 2010 by studentawards inc. This comprehensive survey provides insight into purchasing patterns of Canadian students, focusing on secondary school, college and university students during the 2009-2010 academic year.

The average monthly off-campus expenditure per student attending the various Sports city academy programs is expected to be \$675, which includes \$127 for transportation, \$283 for food and non-alcoholic beverages, \$87 for entertainment, \$61 for telecommunications, \$64 for clothing, and \$53 for other supplies. Figure 4-2 illustrates the projected student spending patterns in the City of St. Albert.

FIGURE 4-2: OFF-CAMPUS STUDENT SPENDING IN ST. ALBERT

Expenditure Category (1)	Average Monthly Student Expenditure		Months	Students	Total Annual Expenditures
	\$	%			
Transportation (public transport, auto insurance, gas, vehicle maintenance)	\$127	18.76%	9	1,542	\$1,758,343
Food & Non-Alcoholic Beverages (2)	\$283	41.95%			\$3,932,671
Entertainment	\$87	12.85%			\$1,204,610
Telecommunications/Cable (3)	\$61	9.09%			\$851,832
Clothing (Clothing, shoes, and accessories)	\$64	9.53%			\$893,743
Supplies (Personal care, cleaning, and school supplies) (4)	\$53	7.82%			\$732,674
Total Expenditure (5)	\$675	100.00%			\$9,373,873

SOURCE: urbanMetrics inc.

1) Students As Consumers - A Syndicated Study: Student Wallet Module February 2010. The results of the Students as Consumers survey were weighted by gender, province of academic institution, and level of education, to reflect the actual demographic composition of students in Canada.

2) Average student grocery expenditures are 14.31% higher in western provinces, compared to the average for all of Canada. West - \$187.70; All of Canada - \$164.20.

3) 66% of the survey participants spend money in the 'Telecommunications/Cable' category X 5,141 total survey participants = 3,393.06 X \$93.00 is the average expenditure amongst all students who spend in each category = \$315,554.58 / 5,141 = \$61.38.

4) 63% of the survey participants spend money in the 'Supplies' category X 5,141 total survey participants = 3,238.83 X \$83.80 is the average expenditure amongst all students who spend in each category = \$271,413.95 / 5,141 = \$52.79.

5) Given that boarding fees are included in the cost of the academy program, student spending projections do not include an allocation for rent/accommodation (student living expenses based on the Students as Consumers survey are shown in Appendix B). Alcohol and tobacco expenditures have also been removed, given that the academy is designed primarily for children under the age of eighteen who are not legally permitted to purchase these products.

We have only included 9 months worth of expenditures in our analysis to provide a more conservative estimate of student expenditures and to account for time that is spent away from St. Albert, during the summer and other holidays. **With 1,542 students, the total off-campus student expenditures in St. Albert are expected to exceed \$9 million annually.**

4.7 STAFF EXPENDITURES

Although the economic impact of staff expenditures has already been captured in the economic impact model, we have analyzed retail trade data for illustrative purposes to get a sense of the distribution of retail expenditures by staff members in the City of St. Albert. One of the major economic benefits of the Sports City would be the employment that is generated. In total, the various sports and recreation facilities, along with the academy will employ 147 people. The majority of the employment generated would be concentrated in the educational services sector. Increased employment opportunities in the local economy will contribute to increased household incomes, inducing more consumer spending that ultimately strengthens the vitality of local economy. The employment and income generated by the Sports City will support local business in a variety of industry categories.

To get a sense of the impact of staff spending in relation to retailers in St. Albert, urbanMetrics has analyzed Statistics Canada retail trade data based on Catalogue 91-002-X. Staff expenditures at retail stores in St. Albert are forecasted in Figure 4-3. To account for expenditures made outside of St. Albert, we have assumed that local retailers will capture 80% of the total expenditures made by staff members. Overall, urbanMetrics has determined that the Sports City staff will contribute more than \$3.0 million each year to local retailers operating in St. Albert. It important to reiterate the Figure 4-3 provides a breakdown of retail sales for illustrative purposes only given that staff expenditures have already been captured in the economic impact analysis for the ongoing operation of Sports City.

FIGURE 4-3: STAFF EXPENDITURES IN ST. ALBERT

Expenditure Category	Annual Staff Expenditures (1)		Staff Members (2)	Total Annual Expenditures	Outflow (%)	Outflow (\$)	Net Annual Expenditures In St. Albert (3)
	\$	%					
Motor vehicle and parts dealers[441]	\$4,002	14%	147	\$588,329	20%	\$117,666	\$470,663
New car dealers[44111]	\$3,200	12%		\$470,340		\$94,068	\$376,272
Used car dealers[44112]	\$101	0%		\$14,886		\$2,977	\$11,909
Other motor vehicle dealers[4412]	\$343	1%		\$50,366		\$10,073	\$40,293
Automotive parts, accessories and tire stores[4413]	\$343	1%		\$50,370		\$10,074	\$40,296
Furniture and home furnishings stores [442]	\$567	2%		\$83,393		\$16,679	\$66,715
Furniture stores [4421]	\$341	1%		\$50,149		\$10,030	\$40,119
Home furnishings stores [4422]	\$226	1%		\$33,244		\$6,649	\$26,595
Electronics and appliance stores [443]	\$614	2%		\$90,200		\$18,040	\$72,160
Building material and garden equipment and supplies dealers [444]	\$935	3%		\$137,513		\$27,503	\$110,010
Food and beverage stores [445]	\$3,505	13%		\$515,302		\$103,060	\$412,241
Grocery stores [4451] (includes 44511 & 44512)	\$2,779	10%		\$408,568		\$81,714	\$326,854
Supermarkets and other grocery (except convenience) stores [44511]	\$2,545	9%		\$374,063		\$74,813	\$299,251
Convenience stores [44512]	\$235	1%		\$34,505		\$6,901	\$27,604
Specialty food stores [4452]	\$100	0%		\$14,748		\$2,950	\$11,798
Beer, wine and liquor stores [4453]	\$600	2%		\$88,182		\$17,636	\$70,545
Health and personal care stores [446]	\$761	3%		\$111,909		\$22,382	\$89,527
Gasoline Stations [447]	\$1,858	7%		\$273,165		\$54,633	\$218,532
Clothing and clothing accessories stores [448]	\$918	3%		\$134,878		\$26,976	\$107,902
Clothing stores [4481]	\$715	3%		\$105,157		\$21,031	\$84,126
Shoe stores [4482]	\$91	0%		\$13,436		\$2,687	\$10,749
Jewellery, luggage and leather goods stores [4483]	\$111	0%		\$16,277		\$3,255	\$13,021
Sporting goods, hobby, book and music stores [451]	\$466	2%		\$68,504		\$13,701	\$54,803
General merchandise stores [452]	\$2,021	7%		\$297,026		\$59,405	\$237,621
Department stores [4521]	\$0	0%		\$0		\$0	\$0
Other general merchandise stores [4529]	\$0	0%		\$0		\$0	\$0
Miscellaneous store retailers [453]	\$367	1%		\$53,963		\$10,793	\$43,170
TOTAL RETAIL TRADE	\$27,745	100%		\$4,078,471		\$815,694	\$3,262,777

SOURCE: urbanMetrics inc.

1) Annual Staff Expenditures are based on the average per capita expenditures, which were calculated using the 2010 Retail Trade Data for Alberta (Statistics Canada Catalogue 63-005-X) and Quarterly Population Estimates (Statistics Canada Catalogue 91-002-X)

2) There are 46.5 staff members that operate the Major Sport Development Centre, in addition to 100 staff members (including teachers) employed at the school.

3) Net annual expenditures in St. Albert have not be adjusted to account for differences in the per capita income of St. Albert Residents relative to the rest of Alberta. Given the high per capita income among St. Albert residents, relative to the rest of Alberta, this can be considered a conservative estimate expenditures made by staff in St. Albert. We have assumed that there will be a 20% outflow of expenditures to stores located outside of the trade area.

5 VISITORS/TOURISM IMPACT

urbanMetrics analysis of visitors spending in St. Albert takes into consideration visitors related to sports facility rentals and value added leagues operated at Sports City, in addition to visitors to the various sports and entertainment venues, and friends/family of students enrolled in the academy programs. The average expenditure per visit to St. Albert does not include money spent at Sports City, but rather focuses on the additional spending that will occur at other commercial enterprises in the local community. ***Overall, the Sports City is expected to generate more than \$5.0 million in spending attributed to non-local visitors in the economy.***

Sports City has signed an exclusive agreement with the Alberta Men's Hockey League (AMHL) to provide ice time for both the summer and winter leagues. In the winter league there are expected to be approximately 80 teams based on existing registration levels. During the winter league 30 games are played, while 18 games are played during the summer league. Each team is permitted to dress a maximum of 17 players and 2 goalies for each game, in addition to coaching staff. Given that the AMHL, draws competitors from the entire Edmonton Census Metropolitan Area, we have assumed that only 7% of the competitors would be local residents. As a result, the ice surface rentals to the AMHL are expected to bring approximately 61,000 annual visitors to the City St. Albert. If the average expenditure per competitor during each trip to St. Albert is \$15.00, the ice surface rentals to the AMHL would generate more than \$900,000 in annual visitors spending in the City of St. Albert.

In addition to the AMHL, there will be a number of value added leagues operated out of Sports City, which will contribute to the number of annual visitors to the local community. Given that the population of St. Albert was only 58,000 according to the 2006 Census, and there expected to the 76,320 participants in all of the value added leagues combined, we have assumed that approximately 15% of all participants will be local residents. As a result, there would be approximately 65,000 annual visitors to the City of St. Albert, attributed to the value added leagues. If each visitor spends an average of \$5.00 each time they are in St. Albert, the value added leagues would generate more than \$300,000 in annual visitors spending.

In addition to the major sports development centre that is featured as part of Sports City, the development will also feature a variety of entertainment properties, which will draw visitors to St. Albert, and stimulate increased visitors spending in the local economy. It is important to note that not all tickets holders are included in our analysis of visitors spending. We have made an allocation to account for local residents, so that they are not included in our analysis of visitors spending in St. Albert. Overall, the Sports City entertainment venues are expected to attract approximately 95,000 visitors to the local community. If each visitor spends an average of \$15.00 per visit to St. Albert, the entertainment venues would generate \$1,400,000 in annual visitor spending.

Family and friends that are visiting students attending the various academy programs will also make an important contribution to annual visitors spending in St. Albert. We have assumed that 15% of the students 1,542 enrolled in the academy program will be local residents. As result, expenditures made by visiting family and friends were not included in our analysis of visitors spending. Overall, there are expected to more than 10,000 annual trips to St. Albert by friends and family of academy students. Because the academy programs are expected to draw students from throughout Canada as well as international destinations, most visits by family and friends will likely be overnight trips to St. Albert. Based on an average expenditure per visit of \$225.00 (including accommodation, food, local transportation, and other expenses), total visitor spending attributed to friends/family of students is estimated at \$2.4 million.

The development of Sports City would not only increase tourism spending in the local community but it would also help to support commercial interest in the City of St. Albert. With increased population and expenditure levels being made by students, parents, staff and visitors to the Sports City, local retailers and commercial services will benefit from higher sales volumes. There is also potential to attract new retailers and commercial services providers that are currently not available in St. Albert.

FIGURE 5-1: OFF-CAMPUS VISITORS SPENDING IN ST. ALBERT

Category	Teams	Players/Team	Games/Season	Percentage of Participants that are Visitors to St. Albert (%)	Annual Visitors to St. Albert	Average Expenditure by Visitors Per Trip to St. Albert	Total Expenditure by SportsCity Visitors
Sport Surface Rentals (1)							
AMHL - Winter	80	21	30	93%	46,872	\$15.00	\$703,080
AMHL - Summer	40	21	18	93%	14,062	\$15.00	\$210,924
Subtotal					60,934		\$914,004
Value Added Leagues (2)							
Slow Pitch League	36	12	20	85%	7,344	\$5.00	\$36,720
Football League	14	36	20	85%	8,568	\$5.00	\$42,840
Soccer Leagues - Adult	36	16	20	85%	9,792	\$5.00	\$48,960
Soccer Leagues - Youth	36	16	20	85%	9,792	\$5.00	\$48,960
Minor Baseball League	32	15	20	85%	8,160	\$5.00	\$40,800
Rugby League	16	18	20	85%	4,896	\$5.00	\$24,480
Floor Ball League	32	15	20	85%	8,160	\$5.00	\$40,800
Ball Hockey	32	15	20	85%	8,160	\$5.00	\$40,800
Subtotal					64,872		\$324,360
Category			Ticket Sales	Percentage of Participants that are Visitors to St. Albert (%)	Annual SportsCity Visitors	Average Expenditure by Visitors Per Trip to St. Albert	Total Expenditure by SportsCity Visitors
Sport City Entertainment Properties							
Movie			300,000	5%	15,000	\$15.00	\$225,000
Play Structure/Climbing/Cages			100,000	20%	20,000	\$15.00	\$300,000
Edmonton Prospects WMBL			23,000	50%	11,500	\$15.00	\$172,500
Northern League			100,000	40%	40,000	\$15.00	\$600,000
Baseball - Other			20,000	40%	8,000	\$15.00	\$120,000
Subtotal					94,500		\$1,417,500
Category	Students	Percentage Local Students	Average Vistors Per Student		Annual SportsCity Visitors	Average Expenditure	Total Expenditure
Family/Friends of Students (3)	1,542	15%	2		10,486	\$225.00	\$2,359,260
TOTAL VISITOR SPENDING IN ST. ALBERT							\$5,015,124

SOURCE: urbanMetrics inc.

- 1) Number of teams based on financial projections provided by SAS Sports. Maximum number of players and games per year are based on discussion with AMHL representatives. We have assumed that 7% of the participants will be residents of St. Albert (and therefore are not included in our analysis of tourism spending), given that the league draws participants from the entire Edmonton CMA.
- 2) The number of teams in each league is based on projections provided by SAS Sports. The number of players on each team was estimated based on the traditional number of players required, including substitute players (we have reduced the number of players on each team slightly to account for the fact that these will be recreational leagues, which may not necessarily have a full traditional roster size for each sport).
- 3) According to projections provided by SAS Sports, the academy is expected to have 1,542 students. We have assumed that on average each student will have two vistors when friends/family come to St. Albert, and there will be four annual visits to the city.

6 PROPERTY TAX IMPACT

The Province of Alberta uses a market value system to assess the value of a property for taxation purposes, expressed in terms of market value. According to the Alberta Ministry of Municipal Affairs, market value refers to the price a property might reasonably be sold for in an open market taking into consideration the existing land use and the range of potential future land uses. It reflects the most likely price of the property, rather than the highest, lowest, or average price.

The property tax assessment information for the SAS Sports land is summarized below in Figure 6-1. Given that the lands are currently undeveloped and not connected to municipal services, the current assessment value and subsequent property tax revenue for the City of St. Albert is very low. A map of the lands included in the SAS Sports amendment proposal is provided in Figure 6-2.

FIGURE 6-1: CURRENT ASSESSMENT VALUE AND PROPERTY TAX LEVY

Land Owner/Developer	Description	Plan	Class Number	Assessment Value	Land Area (acres)	Total Tax Levy 2011
SAS Sports	51 City Annex West	NW-8-54-25-4	80018	\$22,500	81.02	\$223.76
SAS Sports	50 City Annex West	SW-7-54-25-4	80018	\$40,500	161.52	\$402.77
SAS Sports	25517 SHWY 633		10018	\$329,460	163.74	\$2,258.27
			10058	\$61,540		
			80018	\$36,500		
			81058	\$21,000		
SAS Sports	52 City Annex West	9321471	80018	\$500	3.08	\$4.98
TOTAL				\$748,100	409.36	\$4,247

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact model

FIGURE 6-2: MAP OF PROPOSED LANDS FOR DEVELOPMENT



6.1 PROPERTY TAX COMPARISON

To compare the economic benefit of the proposed development in terms of tax revenues, we have compared the annual property tax that would be generated by a typical industrial development on the subject lands, relative to the property tax revenue that is generated according to the proposed development concept for Sports City.

To determine the annual property tax that would be generated by the proposed development, urbanMetrics has reviewed the *2011 Future Industrial Land Requirements Study* completed by Millier, Dickinson, Blais and Watson & Associates. The *2011 Future Industrial Land Requirements Study* indicates that the demand for industrial land in St. Albert is expected to be approximately 9 hectares (22 acres) annually between 2011 and 2036.

According to the *2011 Future Industrial Land Requirements Study*, the geographic location of many of the planned industrial developments in the Edmonton area creates increased competition for the City of St. Albert to attract industrial tenants. The study also indicates that even if the SAS Sports lands were zoned to permit industrial development, there is no guarantee when the land would be absorbed into the market.

Recognizing the strong competition for industrial space in the Edmonton area, we have assumed that the SAS lands would be absorbed gradually over time, if they were developed entirely for industrial purposes. The primary difference in the property tax revenues generated from the two development scenarios lies in the way development would be phased over time. Under the industrial development scenario, only a limited portion of the property will be absorbed by new tenants each year, leaving the remainder of the land undeveloped, which provides the City of St. Albert with almost no annual tax revenue based on Figure 6-1.

Given that there are other areas with property designated for industrial development, we have assumed that Sports City would absorb a *maximum* of 50% of annual demand for industrial space. Assuming the proposed development absorbs 11 acres of industrial land each year, the facility would generate significantly lower tax revenues than if the subject lands were developed based on the Sports City development concept, which includes a mix of residential, commercial, and industrial development.

Under the Sports City concept, the development would be absorbed much more quickly. As a result, the total assessment value of the SAS Sports lands would increase at a faster rate than if they were developed for industrial uses. With the rising assessment value of the SAS Sports lands, the city will benefit from increasing property tax revenue (despite the fact that the residential land is taxed at a lower rate than non-residential land).

For example, during the first full year of operations 11 acres of industrial space would be absorbed under the status quo development scenario, while it is expected that 183 acres of residential, commercial, and industrial space would be absorbed under the Sports City scenario. If only 11 acres of industrial space are absorbed on the subject site each year, the total assessment value of SAS Sports lands will only increase incrementally, rising by \$190,181 annually with every 11 acres that are

absorbed. Under the proposed development concept, Sports City has the potential to dramatically increase the overall assessment value of the SAS Sports lands.

The various components of the Sports City development concept are expected to be constructed over a ten year period. The phasing schedule for the proposed development is summarized below:

- Sports City (35 acres) – including farmer’s market, movie theatre, major sports facilities, academy/private school and some small scale accessory retail enterprises;
 - 3 – 7 years full build out;
- Residential (82 acres) – various residential units would be incorporated in the area around the major sports facilities;
 - 0 – 8 years full build out;
- Commercial/Industrial (128 acres) – commercial units located north of Sports City, including a hotel and conference centre, street-front retail units, as well as additional light industrial and commercial units located east of Sports City;
 - 2 – 10 years full build out.

According to Figure 6-3, the proposed development would contribute more than \$5.0 million annually to municipal property tax revenues in the City of St. Albert once the entire project has been constructed.

FIGURE 6-3: COMPARISON OF PROPERTY TAX REVENUES

Development Alternative		Status Quo	Sports City			
Land Use		Industrial (2)	SportsCity (3)	Commercial / Industrial (4)	Residential (5)	Total
Year 1	Developed Area (ACRES)				12	
	Assessed Value (\$/ACRE or UNIT) (2)	\$1,086,067	\$1,086,067	\$1,086,067	\$409,000	
	Assessed Value (\$)	N/A	N/A	N/A	\$46,040,050	
	Property Tax Revenue	N/A	N/A	N/A	\$458,098	\$458,098
Year 2	Developed Area (ACRES)	11			11	22
	Assessed Value (\$/ACRE or UNIT) (2)	\$1,086,067	\$1,086,067	\$1,086,067	\$409,000	
	Assessed Value (\$)	\$11,946,741	N/A	\$11,946,741	\$84,406,758	
	Property Tax Revenue	\$190,181	N/A	\$190,181	\$839,847	\$1,030,029
Year 3	Developed Area (ACRES)	22			22	32
	Assessed Value (\$/ACRE or UNIT) (2)	\$1,086,067	\$1,086,067	\$1,086,067	\$409,000	
	Assessed Value (\$)	\$23,893,481	N/A	\$23,893,481	\$122,773,466	
	Property Tax Revenue	\$380,363	N/A	\$380,363	\$1,221,596	\$1,601,959
Year 4	Developed Area (ACRES)	33	5		33	42
	Assessed Value (\$/ACRE or UNIT) (2)	\$1,086,067	\$1,086,067	\$1,086,067	\$409,000	
	Assessed Value (\$)	\$35,840,222	\$5,430,337	\$35,840,222	\$161,140,174	
	Property Tax Revenue	\$570,544	\$86,446	\$570,544	\$1,603,345	\$2,260,335
Year 5	Developed Area (ACRES)	44	10		44	52
	Assessed Value (\$/ACRE or UNIT) (2)	\$1,086,067	\$1,086,067	\$1,086,067	\$409,000	
	Assessed Value (\$)	\$47,786,962	\$10,860,673	\$47,786,962	\$199,506,882	
	Property Tax Revenue	\$760,725	\$172,892	\$760,725	\$1,985,093	\$2,918,711
Year 6	Developed Area (ACRES)	55	20		55	62
	Assessed Value (\$/ACRE or UNIT) (3)	\$1,086,067	\$1,086,067	\$1,086,067	\$409,000	
	Assessed Value (\$)	\$59,733,703	\$21,721,346	\$59,733,703	\$237,873,590	
	Property Tax Revenue	\$950,907	\$345,784	\$950,907	\$2,366,842	\$3,663,533
Year 7	Developed Area (ACRES)	66	30		66	72
	Assessed Value (\$/ACRE or UNIT) (4)	\$1,086,067	\$1,086,067	\$1,086,067	\$409,000	
	Assessed Value (\$)	\$71,680,443	\$32,582,020	\$71,680,443	\$276,240,298	
	Property Tax Revenue	\$1,141,088	\$518,676	\$1,141,088	\$2,748,591	\$4,408,356
Year 8	Developed Area (ACRES)	77	30		77	82
	Assessed Value (\$/ACRE or UNIT) (5)	\$1,086,067	\$1,086,067	\$1,086,067	\$409,000	
	Assessed Value (\$)	\$83,627,184	\$32,582,020	\$83,627,184	\$314,607,006	
	Property Tax Revenue	\$1,331,270	\$518,676	\$1,331,270	\$3,130,340	\$4,980,286
Year 9	Developed Area (ACRES)	88	30		82	82
	Assessed Value (\$/ACRE or UNIT) (6)	\$1,086,067	\$1,086,067	\$1,086,067	\$409,000	
	Assessed Value (\$)	\$95,573,925	\$32,582,020	\$89,057,521	\$314,607,006	
	Property Tax Revenue	\$1,521,451	\$518,676	\$1,417,716	\$3,130,340	\$5,066,732
Year 10	Developed Area (ACRES)	99	30		82	82
	Assessed Value (\$/ACRE or UNIT) (7)	\$1,086,067	\$1,086,067	\$1,086,067	\$409,000	
	Assessed Value (\$)	\$107,520,665	\$32,582,020	\$89,057,521	\$314,607,006	
	Property Tax Revenue	\$1,711,632	\$518,676	\$1,417,716	\$3,130,340	\$5,066,732
TOTAL	Property Tax Revenue	\$8,558,161	\$2,679,828	\$8,160,509	\$19,316,486	\$31,454,770

SOURCE: urbanMetrics inc.

- 1) City of St. Albert Property Tax Rates are based on the tax rates for the 2011 taxation year. Tax rates are divided into 'non-residential' and 'residential' rates.
- 2) We have assumed that 11 acres of Industrial Space will be absorbed each year. There is no space recorded in year one to account for the construction period.
- 3) The assessed value per acre of industrial and commercial land is based on the average assessment value for 94 land parcels located in the Riel Business Park during the most recent year available (2010 City of St. Albert Assessment & Tax Roll). The main commercial component includes the Major Sports Facilities, Academy/Private School, Farmer's Market, Movie Theatre, and Accessory retail/commercial uses, which are expected to require 30 acres of land. This component of the development will be constructed over a 3-7 year period.
- 4) The assessed value per acre of industrial and commercial land is based on the average assessment value for 94 land parcels located in the Riel Business Park during the most recent year available (2010 City of St. Albert Assessment & Tax Roll). There are 82 acres of industrial land are included in the development concept that are expected to be phased in over 1-7 years. There is no development shown in the first year to account for construction.
- 5) The assessed value per residential unit is based the housing density in the North Ridge neighbourhood in St. Albert - located directly east of the proposed development. Residential density in the proposed development is expected to be much higher than in the nearby North Ridge neighbourhood, where there are 11.59 dwelling units per hectare (4.69 units/acre). We have assumed that residential density will be 9.38 units per acre (double Northridge density). The average value per residential unit is based on the average assessment value in St. Albert, which is \$409,000 according to the Report on 2010 Tax Assessment Roll For 2011 Taxation Year. The residential development is expected to be constructed over an 8 year period (approximately 10 acres developed each year).

7 STRATEGIC ASSESSMENT

7.1 ECONOMIC DIVERSIFICATION

Like many other communities throughout Canada, St. Albert is subject to considerable economic competition at the regional, provincial, national, and international levels. As a result, economic development is an important focus for the City of St. Albert. Export-oriented employment accommodated through non-residential development is an essential component of the economic development strategy in St. Albert. The ultimate objective of economic development in St. Albert is to increase the overall amount of wealth and economic prosperity by implementing measures that help to diversify and support the economic structure of the community.

The City of St. Albert currently features a high concentration of residential development, compared to the amount of non-residential space that exists in the local market. As a result, the City of St. Albert is actively trying to encourage increased non-residential development to establish a more diverse and balanced tax assessment base. The City of St. Albert is ultimately working towards an 80/20 split between residential and non-residential development.

While achieving an 80/20 split was identified as a critical objective in the *2007 Municipal Development Plan*, the *2011 Future Industrial Land Requirements Study* indicates that achieving an 80/20 split between residential and non-residential development is not an important factor in determining the future economic prosperity of St. Albert. Instead, it is more important for the City of St. Albert to attract non-residential development, which creates high-quality employment opportunities for local residents, which create a variety of indirect effects, which induce further economic impacts.

With the addition of a large mixed-use development centered around Sports City, it is our professional opinion that St. Albert would be helping to strengthen the diversity of the local economy. The project has the potential to create a larger multiplier effect for other businesses in the local economy.

7.2 TOURISM DEVELOPMENT

As detailed earlier in the report, the proposed development will make a significant contribution to the continued development of the tourism industry in St. Albert. Visitors are expected to spend \$5.0 million annually at the Sports City (based on 2010 Canadian dollar value).

In the *2009 Business Attraction Strategy*, the City of St. Albert identified a five target sectors in the economy. Three of the five economic sectors identified are directly supported by the proposed development, including:

- Institutional and educational;
- Construction; and,
- Retail and other commercial sectors.

7.3 SPORTS AND CULTURAL

Marketing the City of St. Albert as a provincial and national centre for sports and recreation has been identified as an objective for municipal council in recent years. In 2008, the City of St. Albert commissioned a report which details the brand direction and marketing plan for the community. The purpose of the brand direction and marketing plan was to establish a brand for St. Albert that differentiated the community from a typical Canadian suburb.

While it was ultimately decided that St. Albert should be branded as Alberta's 'Botanical Arts City' a number of other branding opportunities were also identified. Promoting St. Albert as Alberta's sports capital, or the province's finest recreational community were two of the only brands that were evaluated in detail as part of the marketing plan for the community. These branding strategies were selected because they compliment and capitalize on the existing strengths of the local community.

While branding St. Albert as Alberta's sports and/or recreation centre was not ultimately chosen as the final branding strategy for the community, these two alternatives were carefully explored based on extensive community input and the character of existing assets in the area. The proposed Sports City would help to further promote the development of St. Albert as a provincial and national centre for sports and recreational activities, acting as a *primary-lure*⁶ that draws on customers from an extended market area, given the provincial, national, and international attraction potential of the proposed development.

According to the brand direction and strategy report, "to be a sports capital for the Province, St. Albert would need to have the most, the biggest, the best variety, etc. of sports facilities to stand out from other places." The proposed development provides an opportunity for St. Albert to have among the largest and most comprehensive sports facilities available anywhere in Canada.

Like the effect of the IMG Academy in Bradenton, Florida the proposed development has the potential to make a significant contribution to economic development in St. Albert, bringing increased national and international recognition to the community. The IMG Academy originally began as a training centre for elite tennis players, but has expanded its operations to offer a full range of sports programs, in addition to residential development and some limited retail enterprises. The facility is recognized as having a considerable economic impact on the local community, and has brought international recognition to the City of Bradenton.

Round Rock, Texas provides an example of a community that has experienced a number of positive economic impacts that can be attributed to the community's branding strategy, which is focused around Sports and Recreation. The community has branded itself as the 'Sports Capital of Texas' and boasts a comprehensive inventory of sports and recreation facilities that host a variety of tournaments

⁶ *Primary lures* are places or experiences that are the basis for the brand and bring residents out of their home, visitors to the destination, and attract the interest of potential businesses. These business must be the best of something or something that is total unique and compelling – something the target market can't find closer to home

and other events throughout the year. St. Albert, like Round Rock, has the potential to position itself as a leader in the sports and recreation sector, and distinguish itself from other communities.

While the proposed Sports City development would undoubtedly help to position the City of St. Albert as one Canada's premier destinations for elite sports/recreation facilities and training, the proposed development also has the clear potential to improve economic diversification and tourism development, while creating a more healthy and engaging community for local residents.

7.4 BUILDING HEALTHY ENGAGING COMMUNITIES

Although development of St. Albert as the provincial sports and/or recreation capital was not ultimately chosen as the branding strategy for the community, the promotion of sports and recreational opportunities does help to position St. Albert as a more healthy and engaging community for local residents. While the proposed development aligns well with some of the brand direction and marketing strategies that were considered for the community, particularly St. Albert as a sports and entertainment hub, it also aligns well with the final branding strategy that was chosen – St. Albert as a centre for botanical arts. An emphasis on sustainability has emerged as an important aspect of the St. Albert's branding strategy.

A number of objectives were identified to promote and enhance sustainability in the local community, which align well with the development for Sports City, including the development of green technology and renewable energy sources, as well as a focus on personal health, nutrition, exercise, mental health. As a part of the branding strategy St. Albert is trying to become a home for sustainable development and environmentally friendly communities.

The slogan for the City of St. Albert is 'cultivate life'. The key message for the branding strategy is to feature the community as a place where people enjoy a lifestyle that focuses on the outdoors, redevelopment, sustainability, health and well being. Using botanical arts as the foundation for the branding strategy, the city is looking to become the home for innovation in green living and sustainable industries, attracting firms involved in the design, manufacturing, and distribution of environmentally-friendly goods and services. With new development projects, the City of St. Albert is encouraging a focus on sustainable development practices, the incorporation of green technology, in addition to smart growth concepts.

The subject property would be constructed as part of a 'green-tech' residential development that incorporates smart growth principles to create a more sustainable, environmentally-conscious, and pedestrian-oriented neighbourhood. As a result, the development concept for the residential community aligns well with the broader goals and objectives outlined in the municipal branding strategy, by promoting a more sustainable living environment that also contributes to improved health and well being of local residents. The proposed development would also feature an industrial business park, catering towards companies working in the green technology industry, further promoting sustainability, economic diversity and healthy communities in the City of St. Albert.

8 CONCLUSIONS

Based on the results of our detailed economic impact analysis, the development of Sports City has the potential to generate significant positive economic benefits for the City of St. Albert. Not only would the project attract a significant amount of national and international recognition to the City of St. Albert, but it would also help to achieve a more balanced tax assessment ratio, which is among the most important objectives outlined by municipal council.

The construction of the proposed development is expected to generate a variety of direct, indirect, and induced economic impacts on gross domestic product, employment, labour income, and government revenues. The construction of Sports City is expected to generate \$129 million in direct spending activity, and \$68 million of indirect spending activity, in addition to \$57 million of induced spending activity.

The following figures summarized the results of our economic impact analysis for the *construction* of Sports City:

- **Economic output (gross production) - \$254 million;**
- **Gross domestic product - \$117 million;**
- **Employment – 1,100 jobs;**
- **Labour income - \$81 million; and,**
- **Government revenues - \$49 million.**

While achieving an 80% residential, 20% non-residential tax assessment split has been identified a critical objective by municipal council, the recently completed *2011 Future Industrial Land Requirements Study* indicates that the creation of high quality employment is a more important factor in promoting future economic prosperity. Sports City is also expected to generate significant amount of employment in export-oriented industries that are being specifically targeted by the municipality according to the *2009 Business Attraction Strategy*, including:

- Professional, scientific, and technical services;
- Construction;
- Value-added manufacturing and production; and,
- Environmental and botanical industries.

Export-oriented employment is typically a catalyst to economic growth and industrial land is essential in order to accommodate export-oriented industries, therefore the construction of Sports City is projected to have a significant impact on the local economy.

Like the construction of the Sports City, the ongoing operation of the proposed development is expected to generate a number of positive economic impacts, in terms of gross domestic product, employment, labour income, and government revenues. The ongoing operation of Sports City is

expected to generate \$47 million in direct spending activity, and \$8 million of indirect spending activity, in addition to \$15 million of induced spending activity.

The following figures summarized the results of our economic impact analysis for the *ongoing operations* of Sports City:

- **Economic output (gross production) - \$70 million;**
- **Gross domestic product - \$21 million;**
- **Employment – 224 jobs;**
- **Labour income - \$12 million; and,**
- **Government revenues - \$13 million.**

Outside of the economic impacts derived from the construction and ongoing operation of the Sports City, the proposed development would stimulate economic activity in general. For example, retail expenditures made by staff and students of Sports City will provide an added source of revenue for local retailers and service providers. At the same time visitors to Sports City are expected to make an important contribution to tourism spending in the local economy. The following provides an illustrative ‘snapshot’ of annual visitor expenditures made in St. Albert, by virtue of students, staff, league participants, and family/friends of academy students:

- Off-Campus Student Spending: \$9.4 million.
- Staff Spending: \$3.3 million.
- Non-local Visitor Spending: \$5.0 million.

Overall, the development of Sports City is expected to have a variety of positive economic impacts for the local community. Not only would Sports City strengthen the local economy in terms of gross domestic product, employment, labour income, and government revenues, but the proposed development concept also aligns well with the broader objectives of the City of St. Albert in relation to economic diversification, tourism development, sports and cultural investment, and building healthy communities.

BOTTOM LINE – Based on our professional opinion, Sports City, as proposed by SAS would represent a significant economic boost to the City of St. Albert and the provincial economy as a whole.

The facility would not only provide opportunities for diversification and economic uplift, it would also improve awareness levels, making the City of St. Albert a top-of-mind location. The facility would help elevate St. Albert’s position as a destination for young people focused on athletic and academic success at the highest level.

The Sports City concept, as proposed, would be the type of private sector business enterprise that virtually any economic development agency in North America would be keen to help make happen.

APPENDIX A – FULL TIME EMPLOYMENT - CONSTRUCTION

MEDIUM AGGREGATION	Direct	Indirect	Total Open	Induced	Total Closed
Crop and animal production	0.0	0.7	0.7	0.1	0.8
Forestry and logging	0.0	0.5	0.5	0.2	0.7
Fishing, hunting and trapping	0.0	0.0	0.0	0.0	0.0
Support activities for agriculture and forestry	0.0	0.2	0.2	0.0	0.2
Oil and gas extraction	0.0	1.6	1.6	1.1	2.7
Mining (except oil and gas extraction)	0.0	1.9	1.9	1.1	3.0
Support activities for mining and oil and gas extraction	0.0	0.9	0.9	0.5	1.5
Electric power generation, transmission and distribution	0.0	0.6	0.6	0.4	0.9
Natural gas distribution, water, sewage and other systems	0.0	0.2	0.2	0.1	0.3
Construction	457.2	2.2	459.5	192.5	651.9
Food manufacturing	0.0	0.4	0.4	0.1	0.5
Beverage and tobacco product manufacturing	0.0	0.0	0.0	0.0	0.1
Textile and textile product mills	0.0	0.3	0.3	0.1	0.5
Clothing manufacturing	0.0	0.0	0.0	0.0	0.0
Leather and allied product manufacturing	0.0	0.0	0.0	0.0	0.0
Wood product manufacturing	0.0	6.6	6.6	2.4	9.0
Paper manufacturing	0.0	0.2	0.2	0.1	0.2
Printing and related support activities	0.0	0.6	0.6	0.2	0.9
Petroleum and coal products manufacturing	0.0	0.8	0.8	0.4	1.3
Chemical manufacturing	0.0	0.6	0.6	0.3	0.9
Plastics and rubber products manufacturing	0.0	3.8	3.8	1.3	5.2
Non-metallic mineral product manufacturing	0.0	28.1	28.1	10.3	38.4
Primary metal manufacturing	0.0	0.5	0.5	0.3	0.8
Fabricated metal products manufacturing	0.0	22.6	22.6	10.2	32.8
Machinery manufacturing	0.0	2.0	2.0	1.0	3.0
Computer and electronic product manufacturing	0.0	0.7	0.7	0.3	1.0
Electrical equipment, appliance and component manufacturing	0.0	0.9	0.9	0.3	1.1
Transportation equipment manufacturing	0.0	0.1	0.1	0.0	0.1
Furniture and related product manufacturing	0.0	0.8	0.8	0.3	1.1
Miscellaneous manufacturing	0.0	3.4	3.4	0.8	4.3
Wholesale trade	0.0	30.6	30.6	11.6	42.2
Retail trade	0.0	13.6	13.6	3.1	16.8
Truck transportation	0.0	9.9	9.9	3.6	13.4
Transit and ground passenger transportation	0.0	0.5	0.5	0.1	0.7
Pipeline transportation	0.0	0.1	0.1	0.1	0.2
Other transportation	0.0	3.5	3.5	1.4	5.0
Postal service and couriers and messengers	0.0	3.4	3.4	0.7	4.1
Warehousing and storage	0.0	0.6	0.6	0.2	0.9
Motion picture and sound recording industries	0.0	0.1	0.1	0.0	0.1
Broadcasting and telecommunications	0.0	3.0	3.0	0.8	3.8
Publishing industries, information services and data processing services	0.0	1.4	1.4	0.5	1.9
Finance, insurance, real estate and rental and leasing	13.8	18.5	32.3	13.2	45.5
Professional, scientific and technical services	7.3	67.2	74.5	26.7	101.2
Administrative and support services	0.0	5.9	5.9	1.2	7.1
Waste management and remediation services	0.0	8.9	8.9	2.7	11.6
Educational services	0.0	1.6	1.6	0.3	1.9
Health care and social assistance	0.0	0.2	0.2	0.1	0.3
Arts, entertainment and recreation	0.1	1.3	1.3	0.2	1.5
Accommodation and food services	0.0	4.6	4.6	0.9	5.4
Repair and maintenance	0.0	6.7	6.7	1.7	8.4
Grant-making, civic, and professional and similar organizations	0.0	1.0	1.0	0.3	1.3
Personal and laundry services and private households	0.0	0.6	0.6	0.1	0.7
Operating, office, cafeteria and laboratory supplies	0.0	0.0	0.0	0.0	0.0
Travel, entertainment, advertising and promotion	0.0	0.0	0.0	0.0	0.0
Transportation margins	0.0	0.0	0.0	0.0	0.0
Non-profit institutions serving households (excluding education)	0.0	0.0	0.0	0.0	0.1
Non-profit education services	0.0	0.0	0.0	0.0	0.0
Hospitals and government nursing and residential care facilities	0.0	0.2	0.2	0.1	0.3
Universities and government education services	0.0	0.9	0.9	0.4	1.3
Other municipal government services	0.0	1.8	1.8	0.7	2.5
Other provincial and territorial government services	0.0	0.2	0.2	0.1	0.3
Other federal government services	0.0	0.4	0.4	0.2	0.5
Total	478.5	268.1	746.6	295.4	1,042.0

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact model

APPENDIX B – STUDENTS AS CONSUMERS SURVEY

Expenditure Category (1)	Average Monthly Expenditure - All Respondents		Average Expenditure - All Respondents Who Spend in Each Category	
	\$	%	\$	%
Rent/Housing	\$447	40.47%	\$488	37.40%
Transportation (Public transport, auto insurance, gas, vehicle maintenance)	\$127	11.48%	\$159	12.16%
Food & Non-Alcoholic Beverages	\$248	22.46%	\$259	19.87%
Alcohol & Tobacco (2)	\$17	1.56%	\$62	4.72%
Entertainment	\$87	7.86%	\$62	4.72%
Telecommunications/Cable (3)	\$61	5.56%	\$93	7.13%
Clothing (Clothing, shoes, and accessories)	\$64	5.83%	\$99	7.57%
Supplies (Personal care, cleaning, and school supplies) (4)	\$53	4.78%	\$84	6.43%
Total Expenditure	\$1,104	100.00%	\$1,304	100.00%

SOURCE: urbanMetrics inc.

1) Students As Consumers - A Syndicated Study: Student Wallet Module February 2010.

2) 28% of the survey participants spend money in the 'Alcohol & Tobacco' category X 5,141 total survey participants = 1,439.48 X \$61.50 is the average expenditure amongst all students who spend in each category = \$88,528 / 5,141 = \$17.22.

3) 66% of the survey participants spend money in the 'Telecommunications/Cable' category X 5,141 total survey participants = 3,393.06 X \$93.00 is the average expenditure amongst all students who spend in each category = \$315,554.58 / 5,141 = \$61.38

4) 63% of the survey participants spend money in the 'Supplies' category X 5,141 total survey participants = 3,238.83 X \$83.80 is the average expenditure amongst all students who spend in each category = \$271,413.95 / 5,141 = \$52.79

APPENDIX C – FULL TIME EMPLOYMENT - OPERATIONS

MEDIUM AGGREGATION	Direct	Indirect	Total Open	Induced	Total Closed
Crop and animal production	0.0	0.2	0.2	0.0	0.2
Forestry and logging	0.0	0.0	0.0	0.0	0.0
Fishing, hunting and trapping	0.0	0.0	0.0	0.0	0.0
Support activities for agriculture and forestry	0.0	0.0	0.0	0.0	0.0
Oil and gas extraction	0.0	0.3	0.3	0.3	0.6
Mining (except oil and gas extraction)	0.0	0.2	0.2	0.1	0.3
Support activities for mining and oil and gas extraction	0.0	0.2	0.2	0.1	0.3
Electric power generation, transmission and distribution	0.0	0.1	0.1	0.7	0.8
Natural gas distribution, water, sewage and other systems	0.0	0.1	0.1	0.4	0.5
Construction	0.0	0.8	0.8	0.4	1.2
Food manufacturing	0.0	0.2	0.2	0.1	0.2
Beverage and tobacco product manufacturing	0.0	0.0	0.0	0.0	0.0
Textile and textile product mills	0.0	0.0	0.0	0.0	0.0
Clothing manufacturing	0.0	0.0	0.0	0.0	0.0
Leather and allied product manufacturing	0.0	0.0	0.0	0.0	0.0
Wood product manufacturing	0.0	0.0	0.0	0.0	0.1
Paper manufacturing	0.0	0.1	0.1	0.0	0.1
Printing and related support activities	0.0	0.4	0.4	0.1	0.5
Petroleum and coal products manufacturing	0.0	0.0	0.0	0.0	0.1
Chemical manufacturing	0.0	0.1	0.1	0.0	0.1
Plastics and rubber products manufacturing	0.0	0.1	0.1	0.0	0.1
Non-metallic mineral product manufacturing	0.0	0.0	0.0	0.0	0.1
Primary metal manufacturing	0.0	0.0	0.0	0.0	0.0
Fabricated metal products manufacturing	0.0	0.1	0.1	0.0	0.2
Machinery manufacturing	0.0	0.1	0.1	0.0	0.1
Computer and electronic product manufacturing	0.0	0.0	0.0	0.0	0.0
Electrical equipment, appliance and component manufacturing	0.0	0.0	0.0	0.0	0.0
Transportation equipment manufacturing	0.0	0.0	0.0	0.0	0.0
Furniture and related product manufacturing	0.0	0.0	0.0	0.0	0.0
Miscellaneous manufacturing	0.0	0.1	0.1	0.0	0.2
Wholesale trade	0.0	1.4	1.4	0.7	2.2
Retail trade	0.0	1.7	1.7	0.7	2.3
Truck transportation	0.0	0.5	0.5	0.2	0.6
Transit and ground passenger transportation	0.0	0.2	0.2	0.0	0.2
Pipeline transportation	0.0	0.0	0.0	0.0	0.1
Other transportation	0.0	0.5	0.5	0.2	0.7
Postal service and couriers and messengers	0.0	1.4	1.4	0.3	1.7
Warehousing and storage	0.0	0.1	0.1	0.0	0.1
Motion picture and sound recording industries	0.0	0.0	0.0	0.0	0.0
Broadcasting and telecommunications	0.0	1.2	1.2	0.5	1.8
Publishing industries, information services and data processing services	0.0	1.0	1.0	0.4	1.4
Finance, insurance, real estate and rental and leasing	0.0	4.3	4.3	17.1	21.4
Professional, scientific and technical services	0.0	6.2	6.2	3.3	9.5
Administrative and support services	0.0	2.8	2.8	6.3	9.1
Waste management and remediation services	0.0	1.9	1.9	0.8	2.7
Educational services	85.4	0.7	86.2	0.1	86.3
Health care and social assistance	0.0	0.1	0.1	0.0	0.2
Arts, entertainment and recreation	34.9	0.5	35.4	0.3	35.7
Accommodation and food services	0.0	1.4	1.4	0.3	1.7
Repair and maintenance	0.0	0.7	0.7	0.3	1.1
Grant-making, civic, and professional and similar organizations	0.0	0.4	0.4	0.2	0.5
Personal and laundry services and private households	0.0	0.2	0.2	0.0	0.2
Operating, office, cafeteria and laboratory supplies	0.0	0.0	0.0	0.0	0.0
Travel, entertainment, advertising and promotion	0.0	0.0	0.0	0.0	0.0
Transportation margins	0.0	0.0	0.0	0.0	0.0
Non-profit institutions serving households (excluding education)	0.0	0.0	0.0	0.0	0.0
Non-profit education services	0.0	0.0	0.0	0.0	0.0
Hospitals and government nursing and residential care facilities	0.0	0.1	0.1	0.0	0.1
Universities and government education services	0.0	0.1	0.1	0.1	0.2
Other municipal government services	0.0	0.4	0.4	0.3	0.8
Other provincial and territorial government services	0.0	0.1	0.1	0.0	0.2
Other federal government services	0.0	0.3	0.3	0.2	0.5
Total	120.4	31.4	151.7	35.2	187.0

SOURCE: urbanMetrics inc.

1) Based on Alberta Finance and Enterprise custom economic impact model