



ECONOMIC IMPACT ASSESSMENT

FINAL REPORT

INVICTUS GAMES

VANCOUVER & WHISTLER, BC

APRIL 4, 2025

DEREK MAGER, STC EI CONSULTANT

SUMMARY | BY THE NUMBERS



* Visitors derived from attendance figures obtained from event organizers combined with results from the survey.

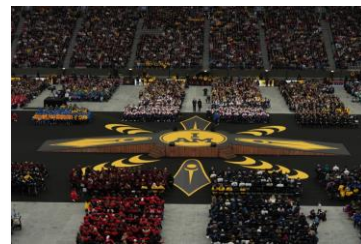
THE EVENT

The Invictus Games is an international multi-sport event first held in 2014, for wounded, injured and sick military service personnel, both serving and veterans. The word 'Invictus' is Latin for 'unconquered', chosen as an embodiment of the fighting spirit of the wounded, injured and sick service personnel and what they can achieve, post-injury.

The Invictus Games were founded by Prince Harry, with the inspiration coming from Prince Harry's 2013 visit to the Warrior Games in the United States, where he witnessed the ability of sport to help both psychologically and physically.

The Invictus Games Vancouver Whistler 2025, presented by ATCO and Boeing, from February 8-16, 2025, brought together 550 competitors from 25 nations to compete in adaptive sports, including the new winter sports: Alpine Skiing and Snowboard, Nordic Skiing, Biathlon, Skeleton and Wheelchair Curling, in addition to the core Invictus Games sports of Indoor Rowing, Sitting Volleyball, Swimming, Wheelchair Rugby and Wheelchair Basketball.

INVICTUS GAMES





METHODOLOGY

The visitor statistics cited in this report were derived from a customized survey that was developed by STC, in conjunction with the client, specifically for this event and was administered onsite by promoting a QR code provided to allow respondents to complete at their leisure as well as a post-event email sent to Friends & Family, volunteers, ticket holders, and other associated with the event.

756

VALID ATTENDEE
RESPONSES WERE
COLLECTED

A total of **756 valid attendee responses were collected** during this process which provides a margin of error of $\pm 3.6\%$ at the 95% confidence level for the results contained in this report.

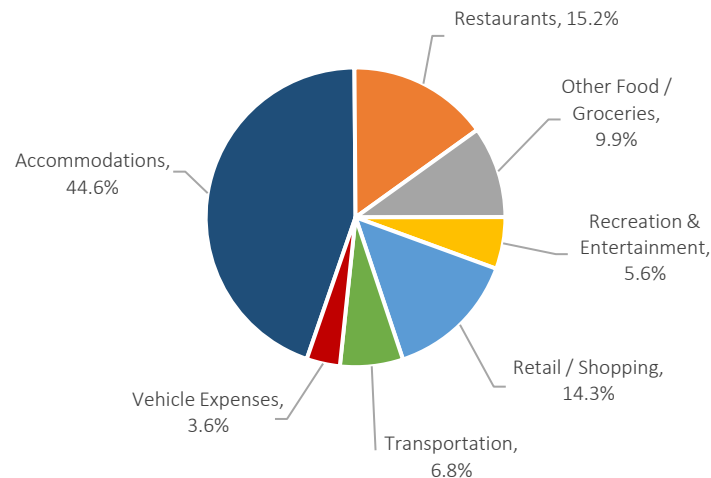
The survey included a variety of questions for the participants and spectators with regards to their age, place of residence, days attended, event experience, etc., while respondents from out-of-town were asked about their length of stay in the local area, and the amount of money spent in various categories while in the area. Additionally, respondents were asked about their support for the Invictus Games, events attended, and sponsorship awareness.

VISITOR SPENDING

| ATTENDEES | PER PARTY | OVERALL |
|----------------------------|-------------------|--------------------|
| Accommodations | \$816.13 | \$1,088,599 |
| Restaurants | \$278.62 | \$402,209 |
| Other Food / Groceries | \$180.83 | \$261,043 |
| Recreation & Entertainment | \$102.52 | \$147,996 |
| Retail Shopping | \$261.26 | \$377,142 |
| Transportation | \$124.25 | \$179,356 |
| Vehicle Expenses | \$66.07 | \$95,375 |
| TOTAL | \$1,829.68 | \$2,551,720 |

AGGREGATE VISITOR
SPENDING WAS JUST UNDER

\$3.9 Million



Other visitor spending (i.e. participants, volunteers, media, VIP's, etc.) was \$1.3 million

**All spending figures shown in this report are those directly attributable to this event influencing visitation to the local area.*



OPERATIONAL & CAPITAL EXPENDITURES

To ensure the successful operation and staging of this event, the combined purchase of **goods and services** by the event organizers were just under **\$59.9 million**.

Additionally, **\$770,000** was spent on **capital projects** related to the future of hosting events and the legacy from specialized equipment.



OPERATIONAL

\$59.9M



CAPITAL

\$770K

These operational expenditures include, but are not limited to staff salaries, facility rentals, professional services, insurance, communication, food and beverage, accommodations, merchandise, and travel.

THE EI RESULTS

The combined spending of out-of-town participants, delegates, spectators and other people who visited Vancouver and Whistler for the Invictus Games, in combination with the expenditures made by the event organizers, totaled over \$64.5 million, supporting almost \$86.1 million in overall economic activity in British Columbia, including almost \$81.3 million of economic activity in the Vancouver area.

These expenditures supported nearly \$36.5 million in wages and salaries in the province through the support of 424 jobs, of which 383 jobs and over \$33.2 million in wages and salaries were supported locally.

The total net economic activity (GDP) generated by the Invictus Games was:

- **\$72.7 million for Canada as a whole**
- **\$53.6 million for the province of British Columbia**
- **\$47.0 million for the City of Vancouver**

The Invictus Games supported tax revenues totaling nearly \$18.0 million across Canada.

| | Vancouver | British Columbia | Canada |
|------------------------|---------------------|---------------------|----------------------|
| Initial Expenditure | \$64,540,268 | \$64,540,268 | \$64,540,268 |
| GDP | \$46,988,432 | \$53,564,437 | \$72,657,752 |
| Wages & Salaries | \$33,241,550 | \$36,476,261 | \$47,244,868 |
| Employment | 382.5 | 424.2 | 580.3 |
| Total Taxes | \$10,370,268 | \$11,939,361 | \$17,984,572 |
| Federal | \$5,688,033 | \$6,533,126 | \$9,335,526 |
| Provincial | \$3,791,627 | \$4,361,806 | \$7,088,810 |
| Municipal | \$890,608 | \$1,044,429 | \$1,560,236 |
| INDUSTRY OUTPUT | \$81,257,197 | \$86,060,891 | \$120,849,039 |

GROSS DOMESTIC PRODUCT

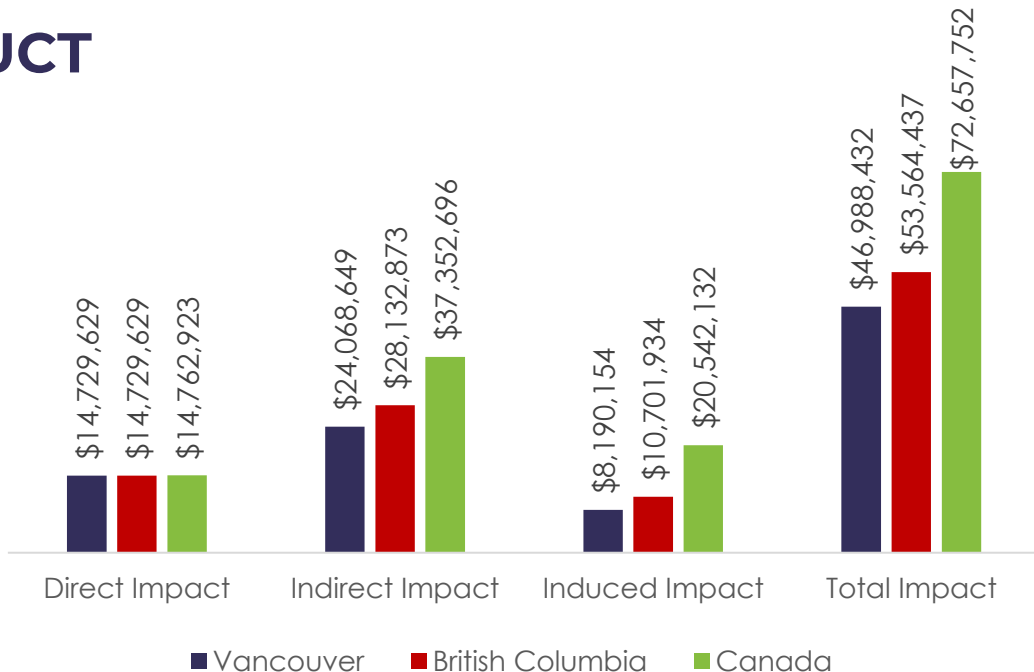
GDP (at basic prices)

The hosting of the **Invictus Games** in **Vancouver and Whistler** contributed nearly **\$72.7 million** in GDP to the Canadian economy through direct and spin-off impacts.



IN GROSS DOMESTIC
PRODUCT (GDP)

\$72.7 M



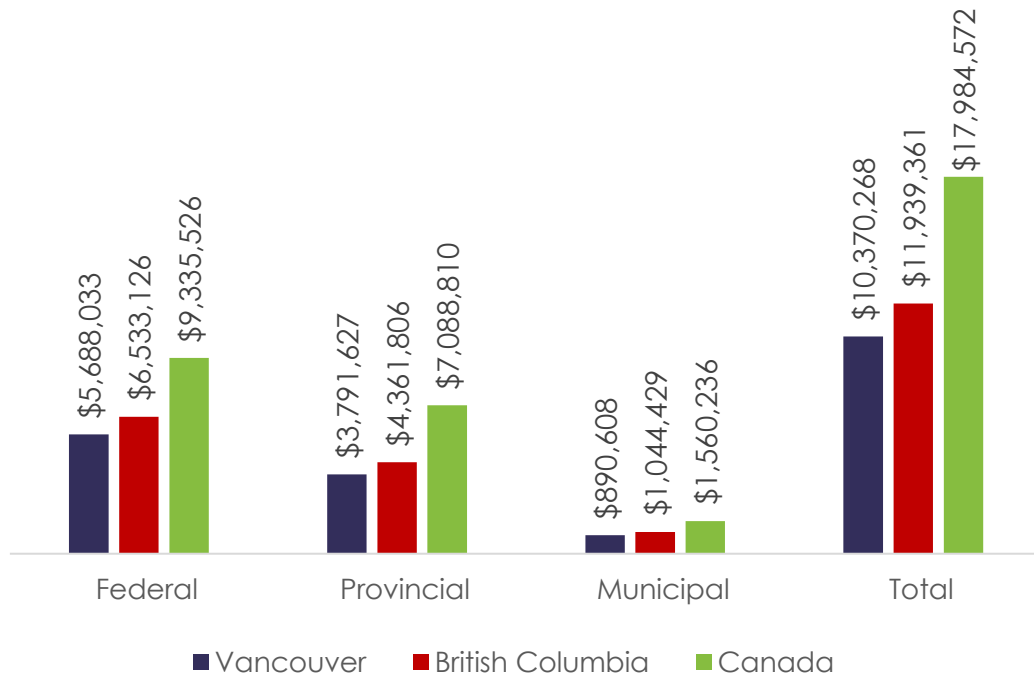
TAXES

The **Invictus Games** hosted in **Vancouver and Whistler** contributed almost **\$18.0 million** in federal, provincial, and local taxes through direct and spin-off effects throughout Canada.



In federal, provincial
& Local

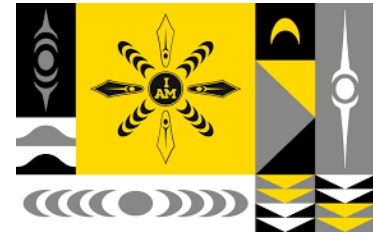
\$18.0 M





ADDITIONAL QUESTIONS

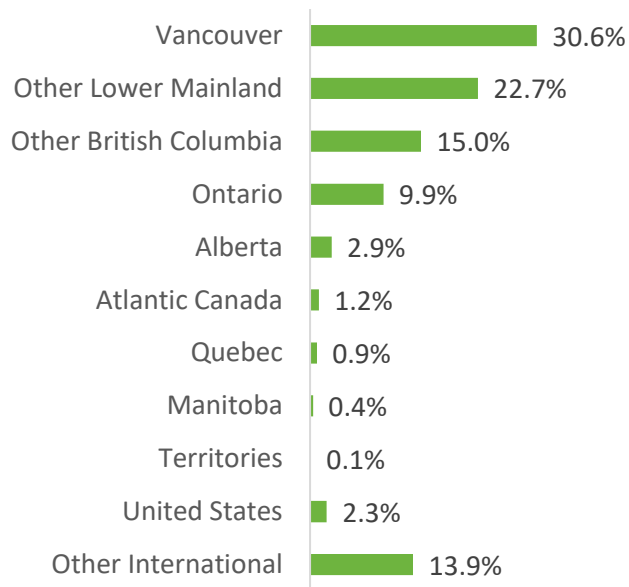
INVICTUS GAMES



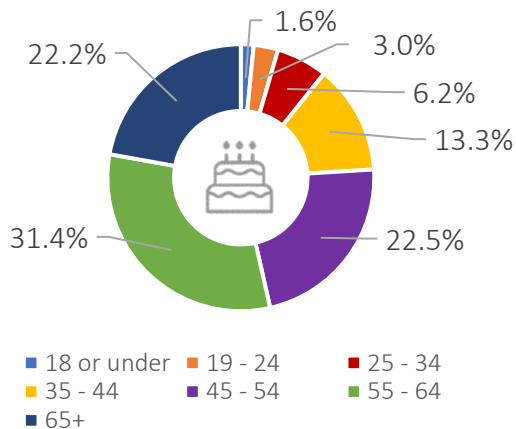
The following pages summarize the results from questions that were included as part of the survey but were not all necessarily required for the economic impact analysis calculations.

DEMOGRAPHICS

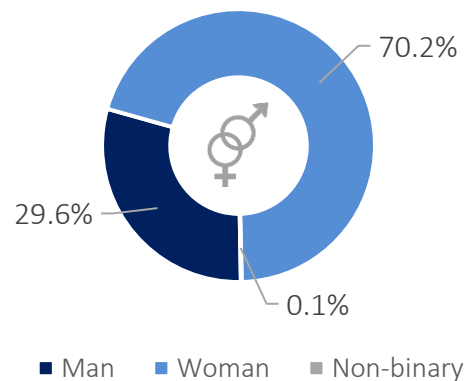
Place of Residence



Age Range



Gender



TRAVEL CHARACTERISTICS



1.6

Average travel party size



9.5

Average nights in Vancouver



3.6 DAY TRIPS

8% of out-of-town attendees made an average of 3.6 day-trips to Vancouver



83%

of attendees indicated that this event was the sole reason for their visit to Vancouver

Overall, the importance of this event in influencing visitation to Vancouver was

9.5/10



92%

of out-of-town attendees stayed overnight during their visit to Vancouver



OF THOSE THAT STAYED OVERNIGHT

61%

Stayed in a hotel / motel

14%

Used a short-term rental

21%

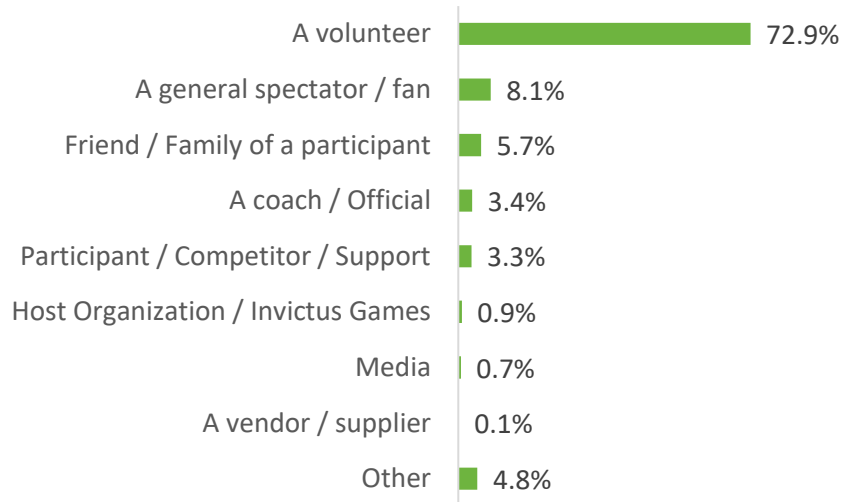
Stayed with friends/family

4%

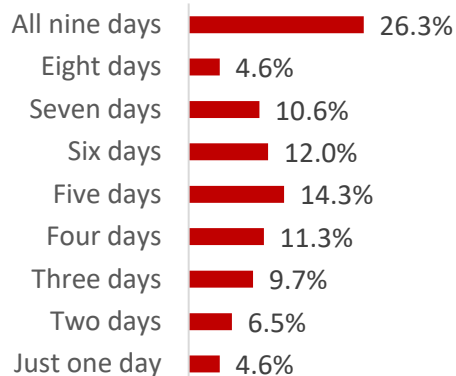
Made other arrangements

ATTENDANCE CHARACTERISTICS

Role at Event



Days Attended

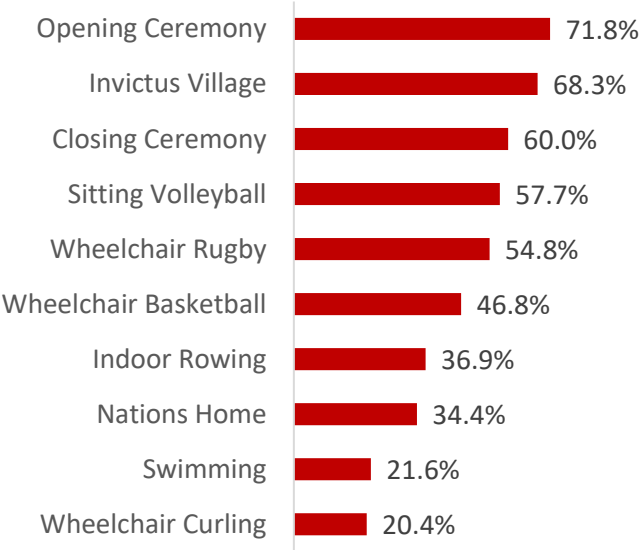


5.8

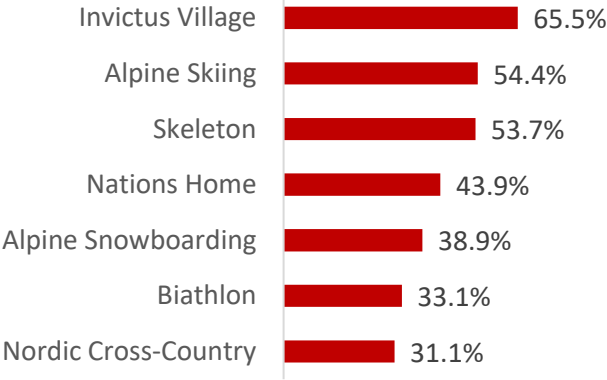
Average days
at event

EVENT ATTENDANCE

Events Attended - Vancouver



Events Attended - Whistler

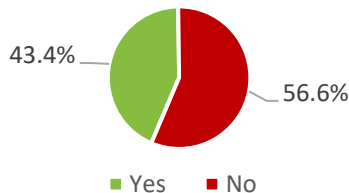


WHISTLER

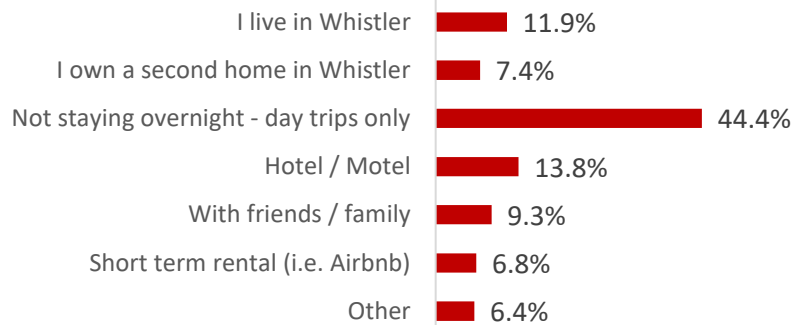
Insights

- 43% of respondents surveyed in Vancouver, or from the online survey, indicated they did or would be attending events based in Whistler.
- Tourism Whistler, as part of their ongoing visitor intercept survey program were able to calculate 4,373 unique visitors to Whistler during the event timeframe with 15% of those (656 people) indicating they would attend Invictus Games events.
- 42% of the people attending Invictus Games events stated the event was a key deciding factor on travel to Whistler, while at the opposite end of the spectrum, 46% indicated the Invictus Games were not at all a factor influencing travel to Whistler.
- The Invictus Village was the most attended aspect of the Games, and attendance for the other events were estimates only as the sporting events were non-ticketed events.

Attending Events in Whistler



Stayed Overnight in Whistler



\$355

Average Overall Spend in Whistler

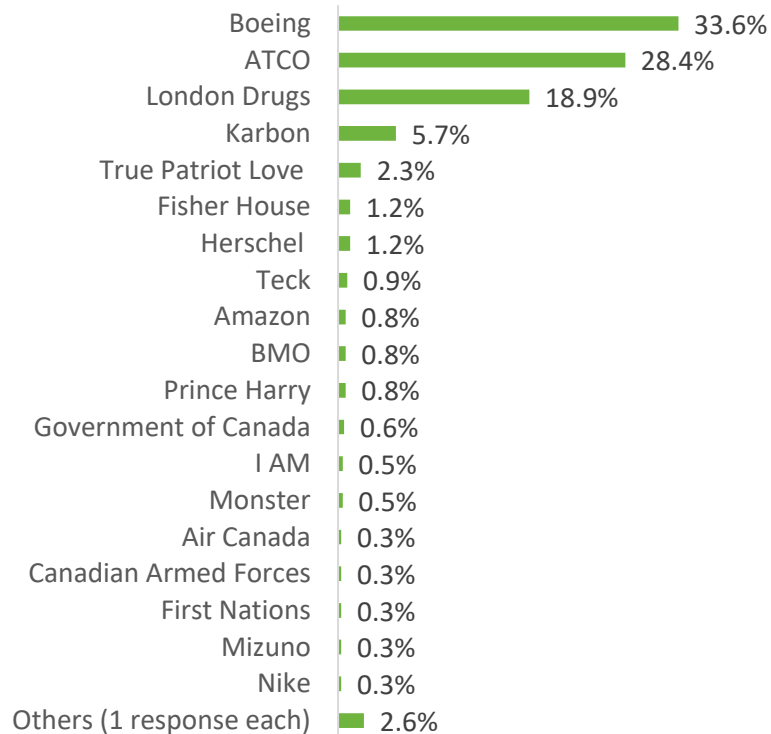


3.6

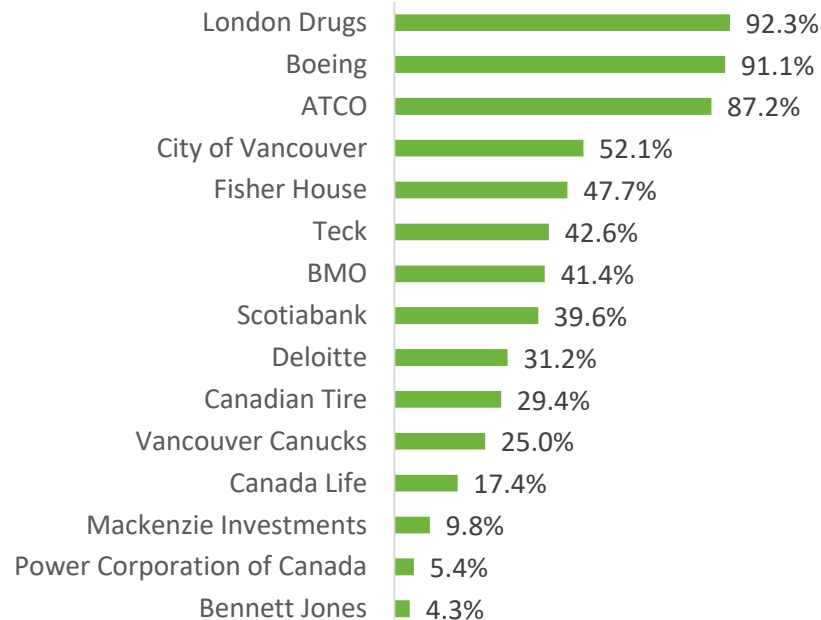
Average nights in Whistler

SPONSORSHIP

Unaided Awareness

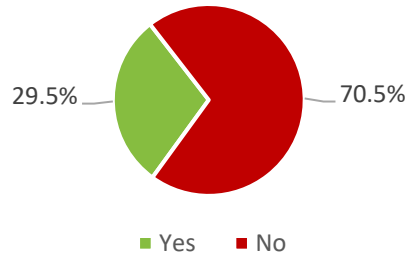


Aided Awareness



TOURISM RELATED

Extending Stay Outside of Invictus Games



Extended Days



3.1

Extended Days in Vancouver

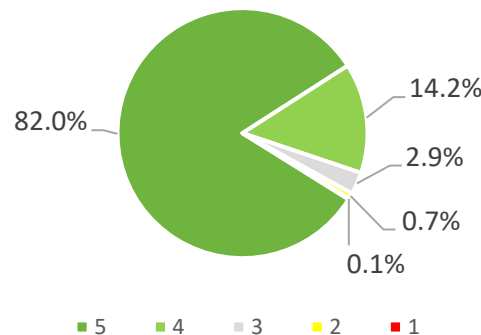


4.7

Extended Days in Other BC

INVICTUS GAMES RELATED

Support for Invictus Games

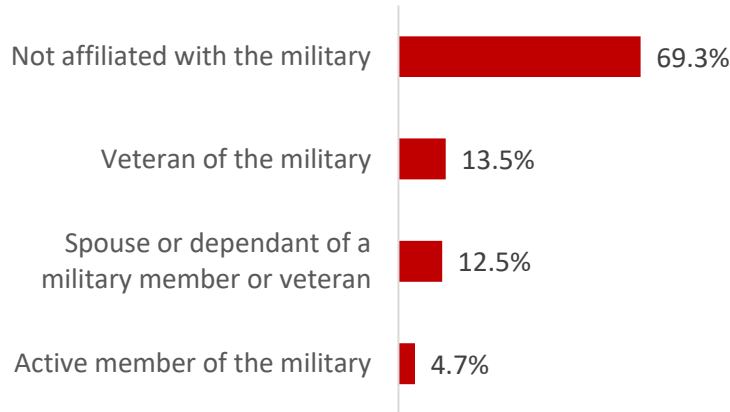


5 = Very Supportive, 1 = Not Very Familiar

Mean Score

4.8/5.0

Military Affiliation





APPENDIX

- What is EI?
- How do we Measure it?
- Reliability of the Model
- Model Outputs
- How it Works
- Glossary of Terms
- Contact Information



WHAT IS EI?

Economic Impact Assessment (EIA) studies measure the positive change in economic activity resulting from hosting an event in a specific city/town. There are three factors:



OUT-OF-TOWN VISITORS SPENDING

The spending of out-of-town visitors while they attend the event.



EVENT ORGANIZERS EXPENDITURES

The expenditures of the event organizers in producing the event(s)



CAPITAL CONSTRUCTION COSTS

Capital construction costs that are directly attributed to hosting the event(s).

An EI study calculates the amount of new money being spent in the host community as a direct result of hosting the event(s), and then the impact these new monies have on the regional, provincial and national economies as a whole.



HOW DO WE MEASURE EI?

Sport Tourism Canada (formerly the Canadian Sport Tourism Alliance) has developed three tools called **STEAM**, **STEAMPRO** and **FESTPRO** to predict, collect, measure and analyze event data across the three primary channels.



STEAM is designed specifically as a predictive model to determine the expected economic impact of hosting a sport event, while **STEAMPRO** is utilized to generate the economic impact from actual spending data during the sport event itself.

STC's latest tool, called **FESTPRO**, is the sister model to **STEAMPRO**. It measures the economic impact of non-sport events like festivals, exhibitions and fairs using actual spending data collected during the event.

Our economic impact services empower event organizers and host cities to accurately assess economic impact resulting from hosting a specific event in a specific location.



RELIABILITY OF THE MODEL

To produce economic contribution assessments that are robust and reliable, STC has partnered with the **Canadian Tourism Research Institute (CTRI)** at **The Conference Board of Canada**. The CTRI serves the travel and tourism industry in providing sound economic forecasts and models with timely and insightful interpretation of data specifically relevant to travel.

The findings in this report make use of the most current and detailed input-output tables and multipliers available from Statistics Canada and leverages the credibility and robustness of sector specific tax data available from Statistics **Canada's Government Revenues Attributable to Tourism (GRAT)** report.

The Conference
Board of Canada



Statistics
Canada



Government Revenues
Attributable to Tourism

MODEL OUTPUTS

The elements (outputs of the model) used to measure the economic impacts are:



GROSS DOMESTIC PRODUCT (GDP)



WAGES & SALARIES



JOBS (FTE)



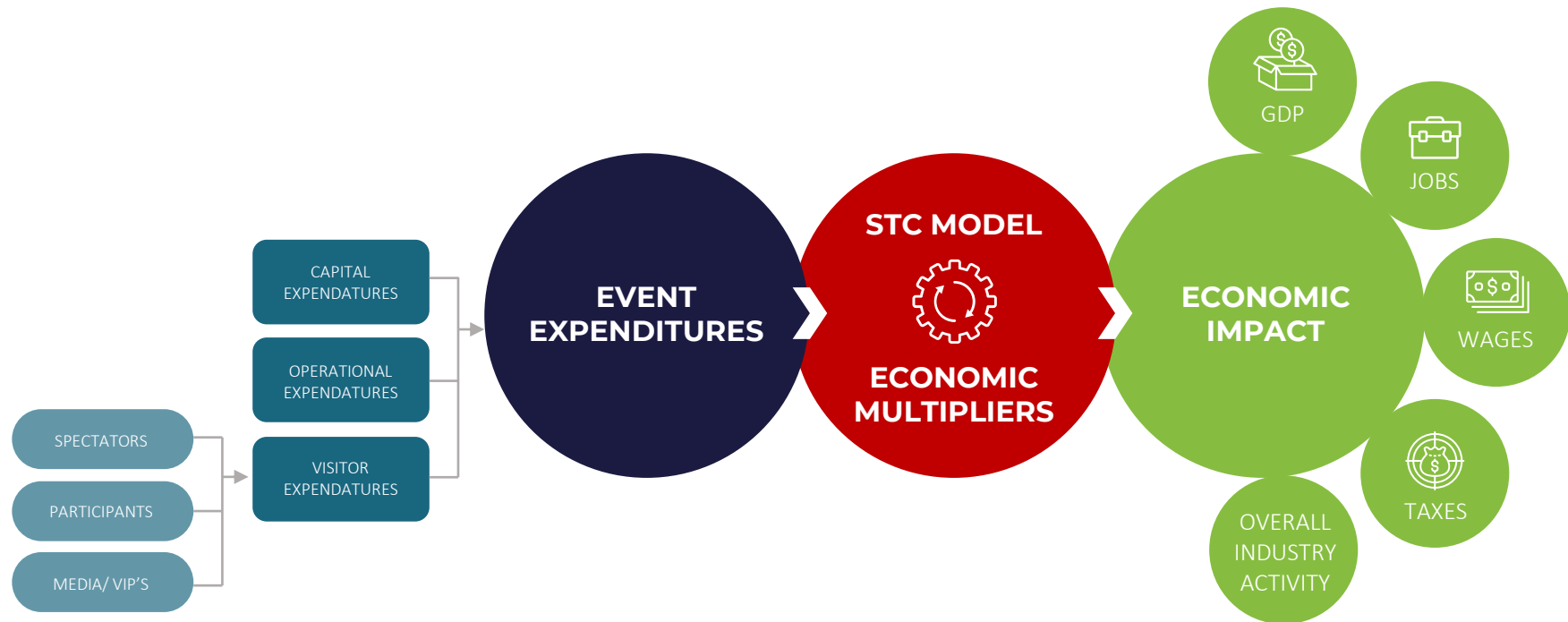
TAXES



INDUSTRY OUTPUT

STC's **STEAMPRO** measures the direct, indirect & induced effects for each of these elements and the **total impacts** are conveyed throughout this report.

HOW IT WORKS



GLOSSARY OF TERMS

Initial Expenditure - This figure indicates the business of initial expenditures used in the analysis. This heading indicates not only the total magnitude of the spending but also the region in which it was spent (thus establishing the "impact" region).

Direct Impact - Relates ONLY to the impact on "front-line" businesses. These are businesses that initially receive the operating revenue or tourist expenditures for the project under analysis. From a business perspective, this impact is limited only to that business or group of businesses involved. From a tourist spending perspective, this can include all businesses such as hotels, restaurants, retail stores, transportation carriers, attraction facilities and so forth.

Indirect Impact - Refers to the impacts resulting from all intermediate rounds of production in the supply of goods and services to industry sectors identified in the direct impact phase.

Induced Impact - These impacts are generated as a result of spending by employees (in the form of consumer spending) and businesses (in the form of investment) that benefited either directly or indirectly from the initial expenditures under analysis.

Gross Domestic Product (GDP) - This figure represents the total value of production of goods and services in the economy resulting from the initial expenditure under analysis (valued at market prices). GDP (at factor cost) - This figure represents the total value of production of goods and services produced by industries resulting from the factors of production. The distinction to GDP (at market prices) is that GDP (at factor cost) is less by the amount of indirect taxes plus subsidies.

Wages & Salaries - This figure represents the amount of wages and salaries generated by the initial expenditure. This information is presented by the aggregate of direct, indirect, and induced impacts.

Employment - Depending upon the selection of employment units (person-years or equivalent full-year jobs) these figures represent the employment generated by the initial expenditure. "Equivalent Full-Year Jobs", if selected, include both part-time and full-time work in ratios consistent with the specific industries.

Industry Output - These figures represent the direct & indirect and total impact (including induced impacts) on industry output generated by the initial tourism expenditure. It should be noted that the industry output measure represents the sum total of all economic activity that has taken place and consequently could involve some double counting on the part of the intermediate production phase. Since the Gross Domestic Product (GDP) figure includes only the net total of all economic activity (i.e. considers only the value added), the industry output measure will always exceed or at least equal the value of GDP.

Taxes - These figures represent the amount of taxes contributed to municipal, provincial, and federal levels of government relating to the project under analysis.



CONTACT

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If you would like to conduct another EI study using **STEAM**, **STEAMPRO** or **FESTPRO** on any other type of event, please contact research@sporttourismcanada.com