

IMPROVEMENT DISTRICT NO. 4 WATERTON

Accommodation and Food Services

Table of Contents

Resident Labour Force in Sector	4
Largest Industries in Sector	5
Declining Industries in Sector	6
Establishments in Sector	7
Specialist Industries in Sector	8
Star Industries in Sector	9
Anchor Industries in Sector	10
Employment in Sector	11
Establishments in Sector by Number of Employees	12

Executive Summary

Improvement District No. 4 Waterton's accommodation and food services sector is defined by a narrow but sizable employment base centered on lodging. In 2025, sector employment remained well above its 2020 level despite a recent decline from the 2024 peak, indicating a strong rebound after the dip recorded in 2021 and some easing in the latest year. At the same time, the resident labour force presents a very different picture: the 2021 census recorded no resident workers in the sector, down from a small base in 2016. The result is a local profile in which sector activity is clearly present, but its resident workforce footprint is minimal in the census data.

That activity is dominated by traveller accommodation. With 294 jobs in 2025, it far outweighs the local restaurant segment and remains the clear center of the sector's employment structure. Its employment slipped only slightly over the past year and was still far above its level five years earlier, while its specialization remained exceptionally high, with a location quotient of 70.1. Food service shows a much weaker trajectory. Restaurant employment fell sharply over both one year and five years, and its specialization also dropped steeply, leaving it as a much smaller and less stable part of the sector. This contrast gives the sector an uneven shape: one large lodging industry with sustained prominence, alongside a food service base that has contracted materially over time.

The business base is small and had been fairly steady for several years before contracting in 2025. Establishments generally held between 12 and 13 from 2018 through 2024, then fell to 9, suggesting recent consolidation or loss within a limited local base. Those businesses are spread across small and mid-sized size classes rather than concentrated in very large operations, though the largest cluster sits in the 20 to 49 employee range. The combined picture is of an accommodation and food services sector that remains important locally because of concentrated lodging employment, but is also increasingly unbalanced, with fewer establishments, weaker restaurant activity, and little resident labour force presence captured in the most recent census.

Resident Labour Force in Sector

Improvement District No. 4 Waterton recorded no resident labour force in this sector in 2021, down from 20 people in 2016, a 100.0% decline over five years.

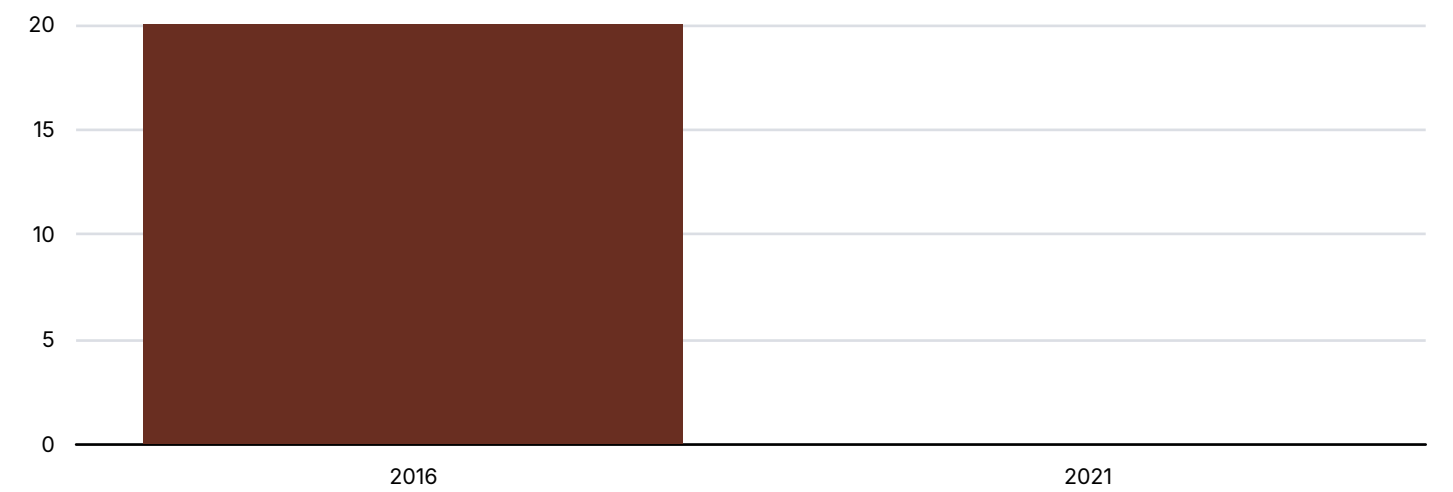
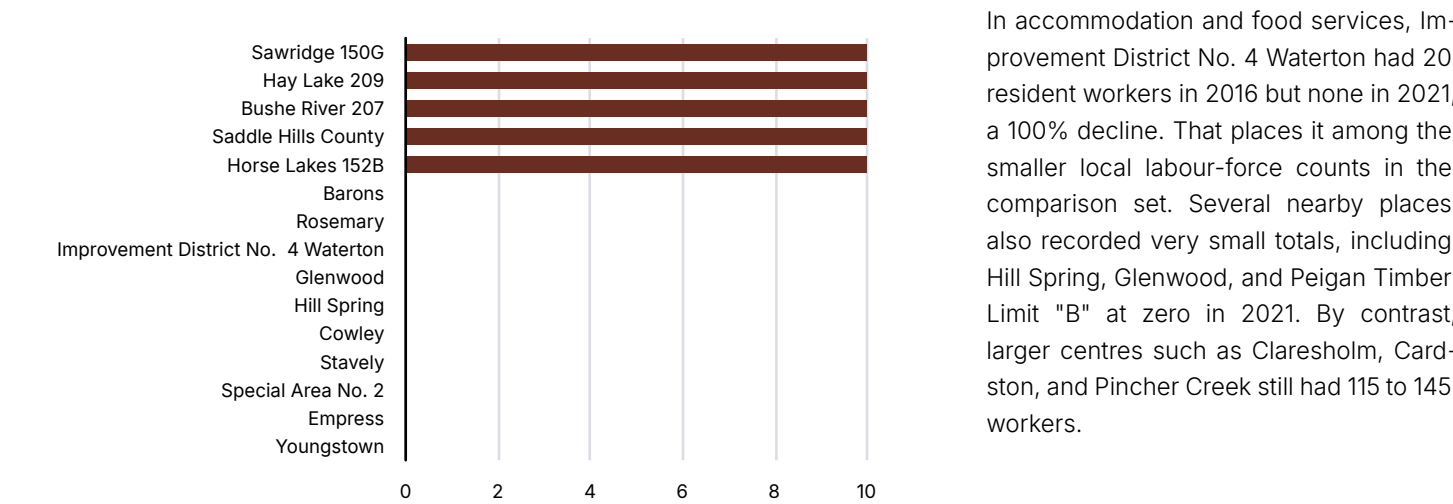


Figure 1.1: Shows the number of resident workers in a specific sector. It helps indicate how many local residents are employed in that part of the economy. (Improvement District No. 4 Waterton, 2016-2021)¹

In Improvement District No. 4 Waterton, the resident labour force in accommodation and food services fell sharply over the five-year period. The count was 20 people in 2016 and 0 in 2021, a decline of 100%. That change means the sector had no resident workers recorded in the 2021 census count, compared with a small base five years earlier. Within the labour force aged 15 years and over, the pattern is one of complete contraction rather than gradual movement. The data show a clear downward shift in this sector between censuses.



In accommodation and food services, Improvement District No. 4 Waterton had 20 resident workers in 2016 but none in 2021, a 100% decline. That places it among the smaller local labour-force counts in the comparison set. Several nearby places also recorded very small totals, including Hill Spring, Glenwood, and Peigan Timber Limit "B" at zero in 2021. By contrast, larger centres such as Claresholm, Cardston, and Pincher Creek still had 115 to 145 workers.

Figure 1.2: Comparison of Resident Labour Force in Sector with other locations (Improvement District No. 4 Waterton, 2021)¹

Largest Industries in Sector

Traveller accommodation dominates employment in Improvement District No. 4 Waterton with 294 people in 2025, down 1.7% from a year earlier but up 61.5% over five years. Full-service restaurants employed 36 people.

In Improvement District No. 4 Waterton, employment in accommodation and food services is concentrated in just two industries, with traveller accommodation clearly dominating the sector. In 2025, traveller accommodation employed 294 people, while full-service restaurants and limited-service eating places employed 36. Together, those two industries account for the sector's visible core in this location, but they are not moving in the same direction. Traveller accommodation was nearly flat

over the past year, edging down 1.7%, yet it remained far above the restaurant category in both size and momentum over five years, rising 61.5% from that longer-term reference point. By contrast, restaurant employment fell sharply, down 46.3% over one year and 48.6% over five years. The pattern suggests a sector shaped by one large, stable lodging industry and a much smaller food service base that has contracted over time. That mix points to a narrow employment profile within the sector.

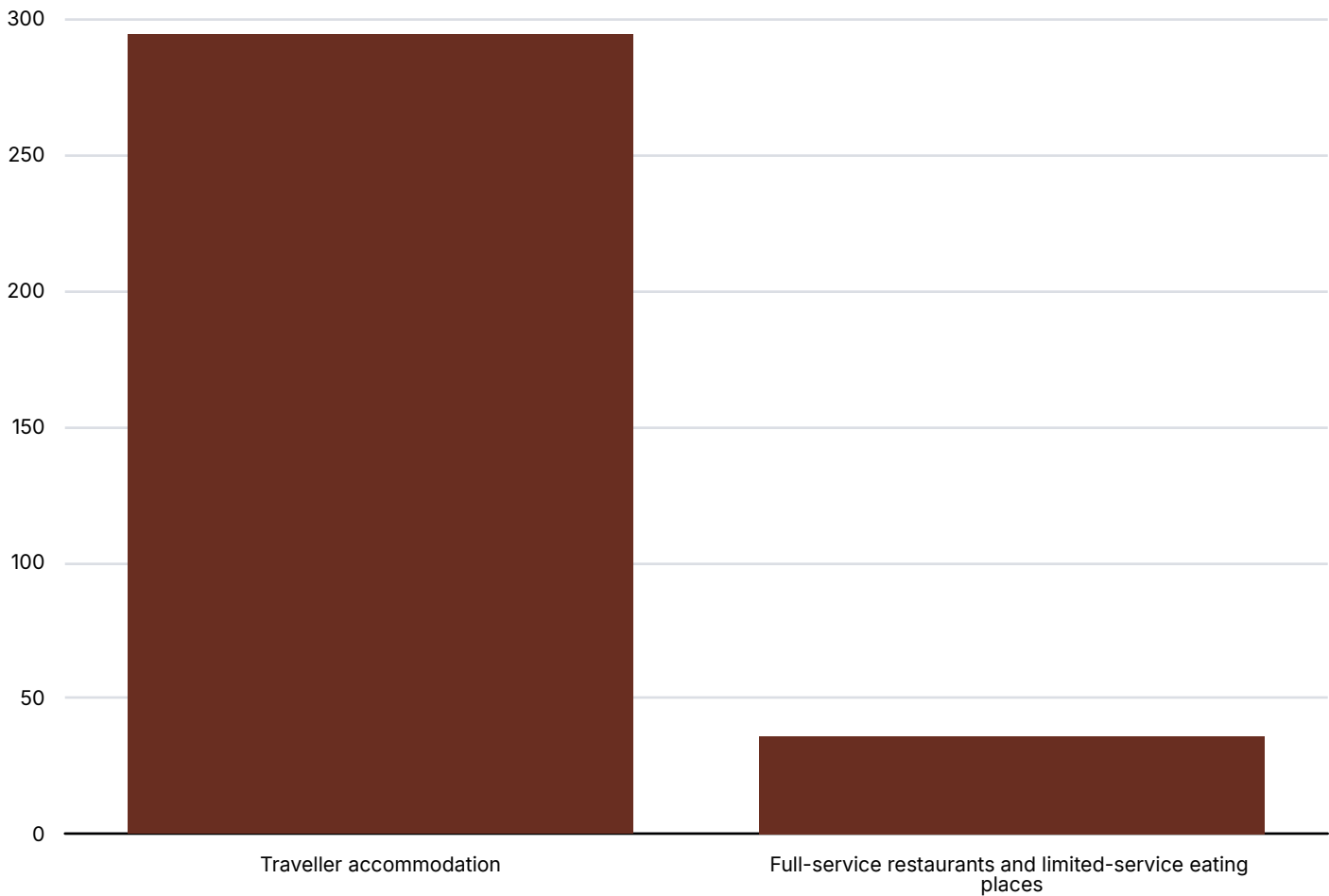


Figure 2.1: Shows the industries within this sector with the highest employment. It helps identify the biggest components of the sector. (Improvement District No. 4 Waterton, 2025)²

Declining Industries in Sector

Traveller accommodation employed 294 people in Improvement District No. 4 Waterton in 2025, down 1.67% from a year earlier but up 61.54% over five years. Restaurants employed 36 people, down 46.27% yearly and 48.57% over five years.

In Improvement District No. 4 Waterton, the accommodation and food services sector shows a mixed picture among industries with recent employment declines. The clearest contraction is in full-service restaurants and limited-service eating places, where employment fell to 36 people in 2025, down 46.3% over one year and 48.6% over five years. Traveller accommodation is much larger, with 294 employees in 2025, and it was nearly flat over the past year, edging down 1.7%. Even so, its

five-year change was strongly positive at 61.5%, which sets it apart from the restaurant segment. The contrast suggests that recent weakness in this sector is concentrated in food service rather than accommodation. Within the available data, traveller accommodation remains the dominant employer, while the restaurant category has both the sharper short-term drop and the longer-term decline.

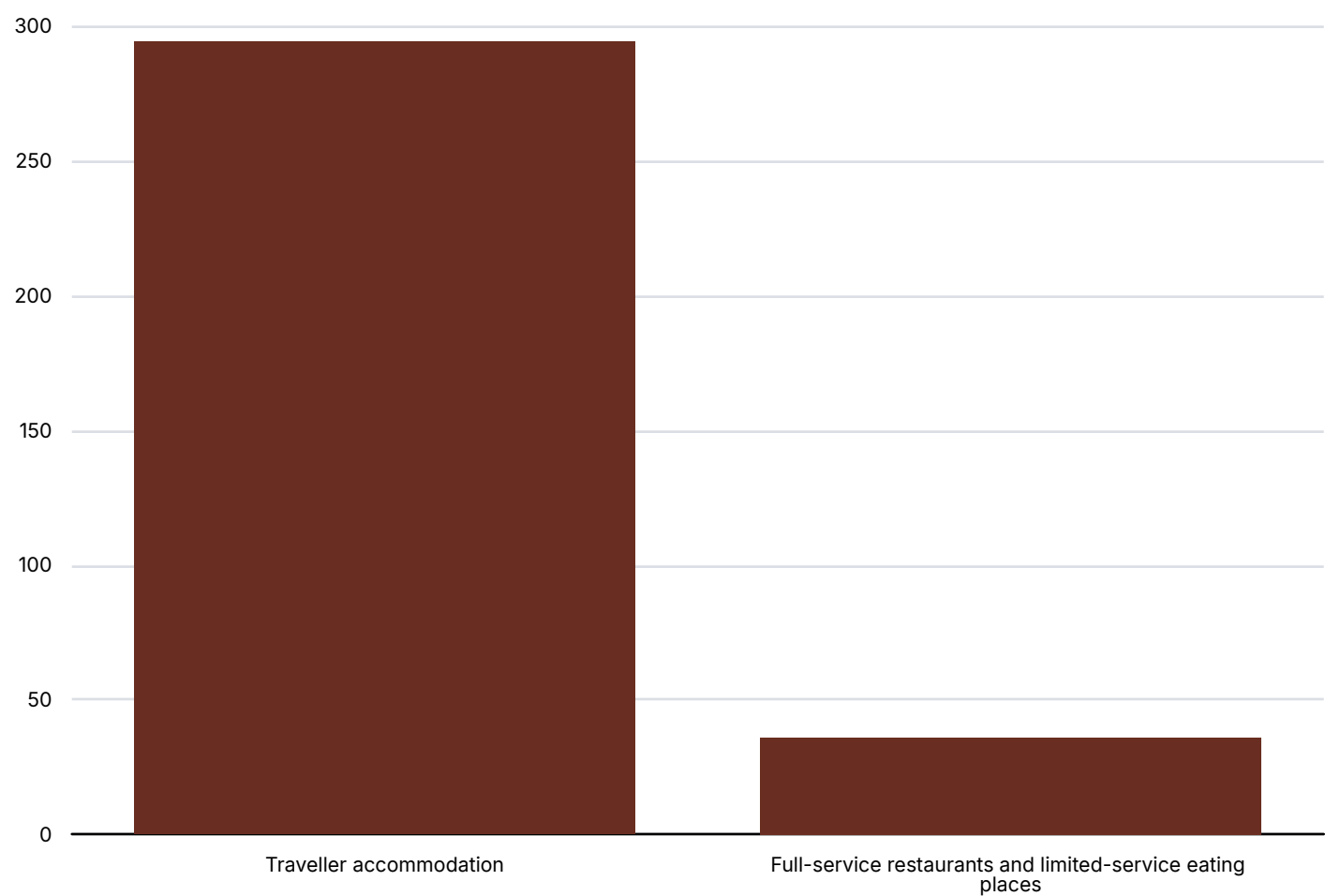


Figure 3.1: Shows industries within this sector where employment has decreased the most over the selected time period. It helps identify segments of the sector that are losing jobs. (Improvement District No. 4 Waterton, 2025)²

Establishments in Sector

Improvement District No. 4 Waterton had 9 business establishments in 2025, down 25.0% from 2024 and 25.0% from 2020. The count held at 12 to 13 from 2018 to 2024.

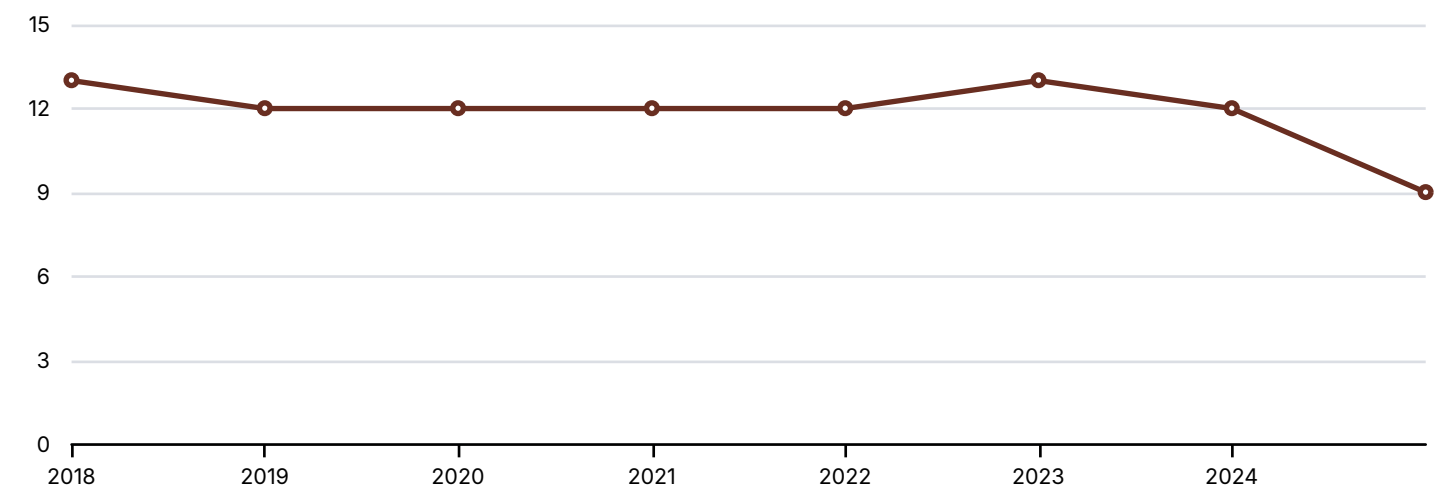
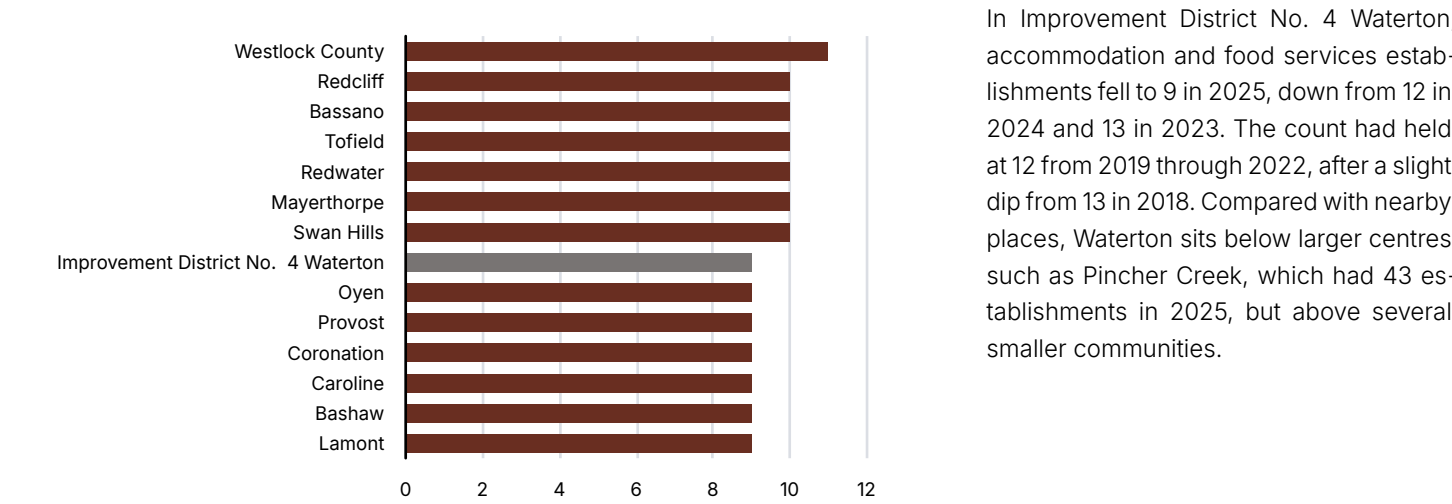


Figure 4.1: Shows the number of business establishments in a specific sector. It helps indicate the scale of business activity in that sector. (Improvement District No. 4 Waterton, 2018-2025)³

In Improvement District No. 4 Waterton, the number of business establishments in accommodation and food services has been small and fairly stable for much of the period, before a sharper decline in 2025. The sector moved between 12 and 13 establishments from 2018 through 2024, then fell to 9 in 2025. The series began at 13 in 2018, slipped to 12 in 2019, and stayed at 12 through 2022. It briefly rose to 13 in 2023, returned to 12 in 2024, and then dropped by 25.0% in 2025. That pattern suggests limited change over most years, followed by a recent contraction in the sector's establishment count.



In Improvement District No. 4 Waterton, accommodation and food services establishments fell to 9 in 2025, down from 12 in 2024 and 13 in 2023. The count had held at 12 from 2019 through 2022, after a slight dip from 13 in 2018. Compared with nearby places, Waterton sits below larger centres such as Pincher Creek, which had 43 establishments in 2025, but above several smaller communities.

Figure 4.2: Comparison of Establishments in Sector with other locations (Improvement District No. 4 Waterton, 2025)³

Specialist Industries in Sector

Traveller accommodation is the clear specialization in Improvement District No. 4 Waterton, with a location quotient of 70.1, up 7.9% over one year and 2.9% over five years. Full-service and limited-service eating places fell to 1.5, down 41.3% and 64.9%.

Improvement District No. 4 Waterton shows a very uneven pattern of specialization in accommodation and food services. The strongest concentration is in traveller accommodation, with a location quotient of 70.1 in 2025, and that specialization has edged higher recently, up 7.9% over the past year and 2.9% over five years. By contrast, full-service restaurants and limited-service eating places are far less specialized, with an LQ of 1.5, and the trend there is sharply negative, down 41.3% in one year

and 64.9% over five years. The contrast between the two industries suggests that local employment in this sector is dominated by accommodation rather than food service. The recent gains in traveller accommodation point to continued concentration, while the restaurant category has weakened substantially over both the short and longer term. Within this sector, Waterton's profile is therefore highly focused on lodging-related employment rather than a balanced mix of activities.

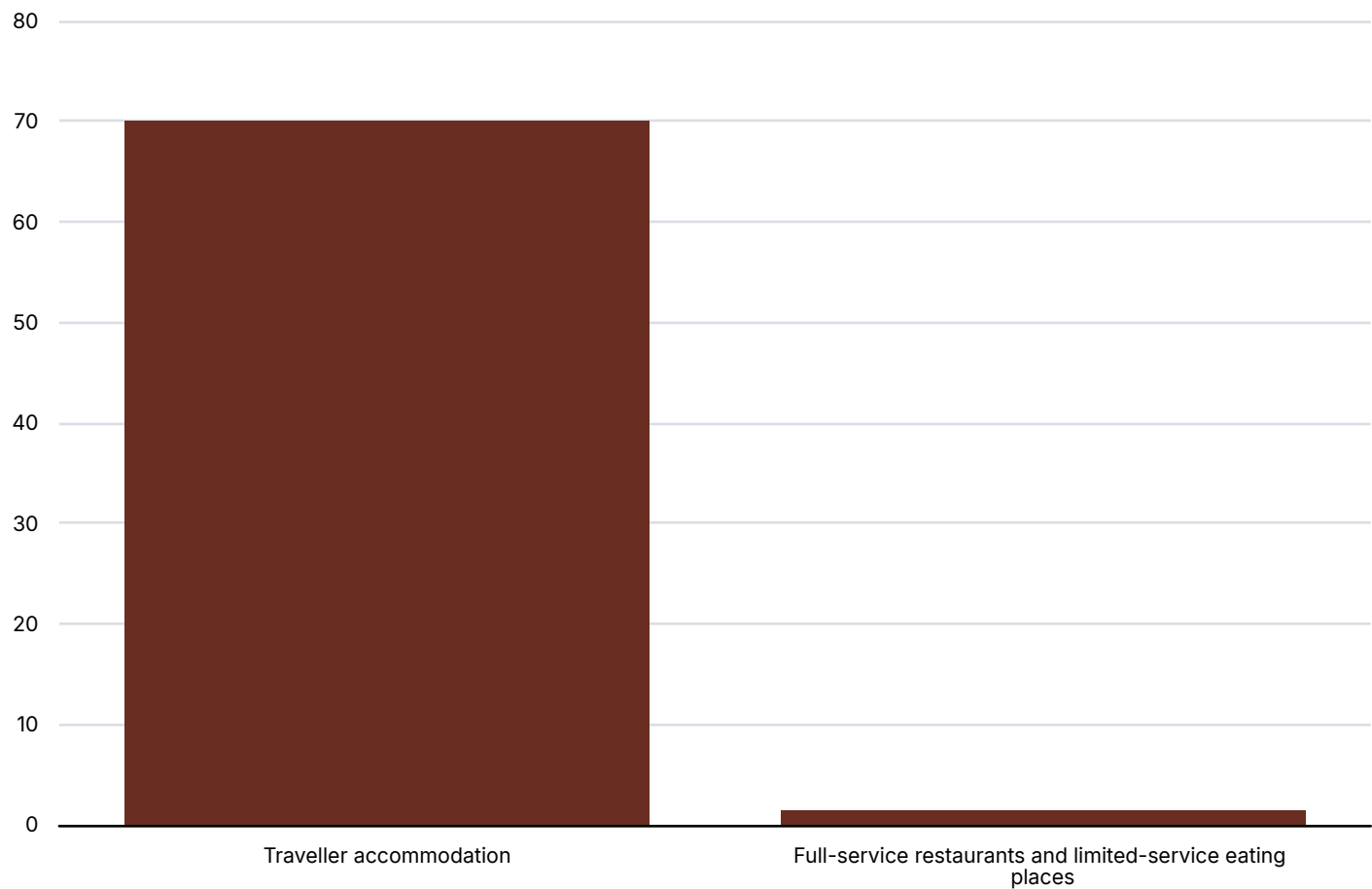


Figure 5.1: Shows industries within this sector where the local economy has the highest level of specialization based on employment concentration. Industries are categorized based on specialization (location quotient) and recent employment growth or change in concentration. (Improvement District No. 4 Waterton, 2025)⁴

Star Industries in Sector

Traveller accommodation dominates in Improvement District No. 4 Waterton, with a location quotient of 70.1 in 2025. It rose 7.9% from 2024 and 2.9% over five years, while remaining far above restaurants at 4.2.

Improvement District No. 4 Waterton stands out in accommodation and food services for a very strong concentration in traveller accommodation. In 2025, this industry posted a location quotient of 70.1, placing it far above a typical local employment mix and making it the clear focus within the sector. The recent trend is also positive. Traveller accommodation recorded a 7.9% one-year increase and a 2.9% five-year increase, suggesting that the industry has added momentum in both the short and longer term. Those changes matter because they show growth

alongside an already high level of specialization. With no benchmark series included in the data, the main comparison is internal: this is not just a large share of the sector, but one that is still strengthening. The combination of high concentration and continued growth distinguishes it from a static niche. For accommodation and food services, the local pattern is narrowly centered on traveller accommodation, and the available numbers point to sustained specialization rather than broad-based diversification.

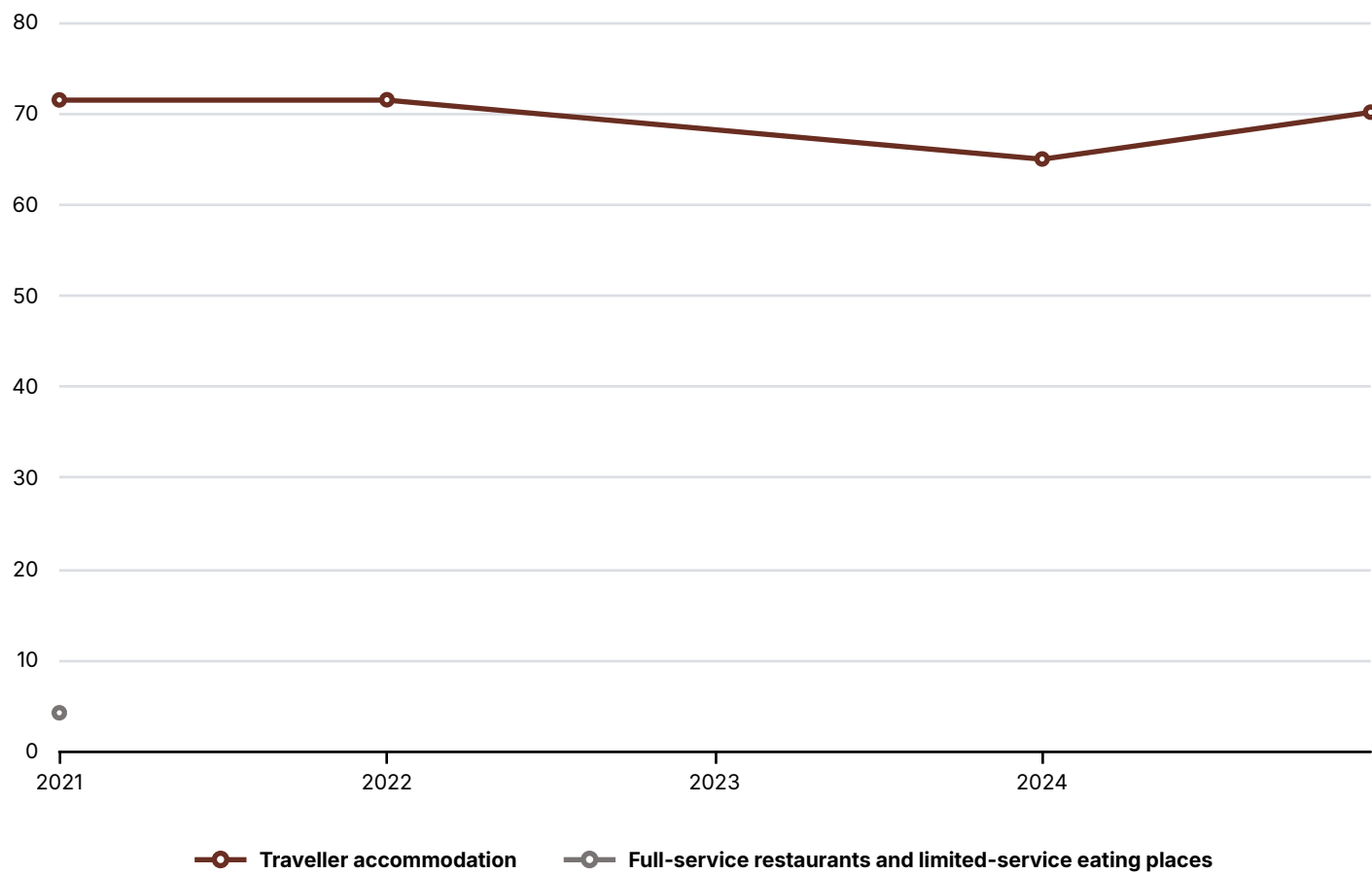


Figure 6.1: Shows industries within this sector where the local economy has strong specialization and increasing concentration or strong growth. Industries are categorized based on specialization (location quotient) and recent employment growth or change in concentration. (Improvement District No. 4 Waterton, 2021-2025)⁴

Anchor Industries in Sector

Full-service restaurants and limited-service eating places remained the leading anchor industry in 2025, with a location quotient of 1.4551. Concentration fell 41.3% in the past year and 64.9% over five years.

In Improvement District No. 4 Waterton, the accommodation and food services sector is anchored by full-service restaurants and limited-service eating places. In 2025, this industry registered a location quotient of 1.4551, indicating a concentration above the broader benchmark used in the dataset. The pattern is defined less by expansion than by weakening concentration over time. The industry’s location quotient fell 41.3% over the past year and 64.9% over five years, showing that its local

prominence has narrowed substantially even though it remains specialized. That combination points to an anchor industry that is still relatively important within the sector, but less dominant than it was. Because the data provide only one industry entry, the broader sector structure cannot be compared here. What stands out is the gap between current specialization and the scale of recent decline. The result is a picture of continued presence paired with clear erosion in concentration.

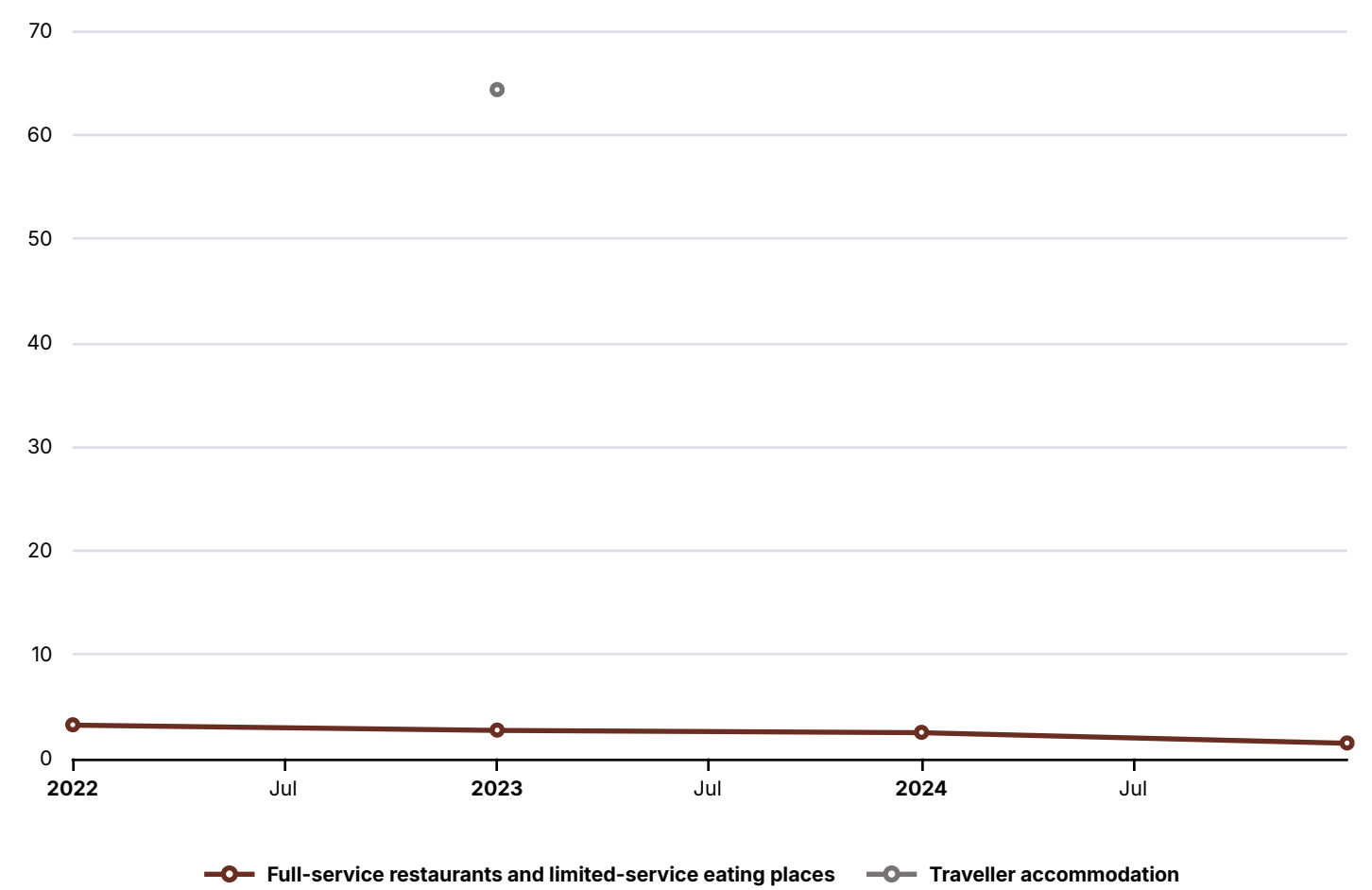


Figure 7.1: Shows industries within this sector where the local economy has strong specialization but relatively stable or declining concentration. Industries are categorized based on specialization (location quotient) and recent employment growth or change in concentration. (Improvement District No. 4 Waterton, 2022-2025)⁴

Employment in Sector

Employment in Improvement District No. 4 Waterton fell to 330 people in 2025, down 9.8% from 2024, yet remained 31.0% above 2020's 252. Jobs peaked at 366 in 2024.

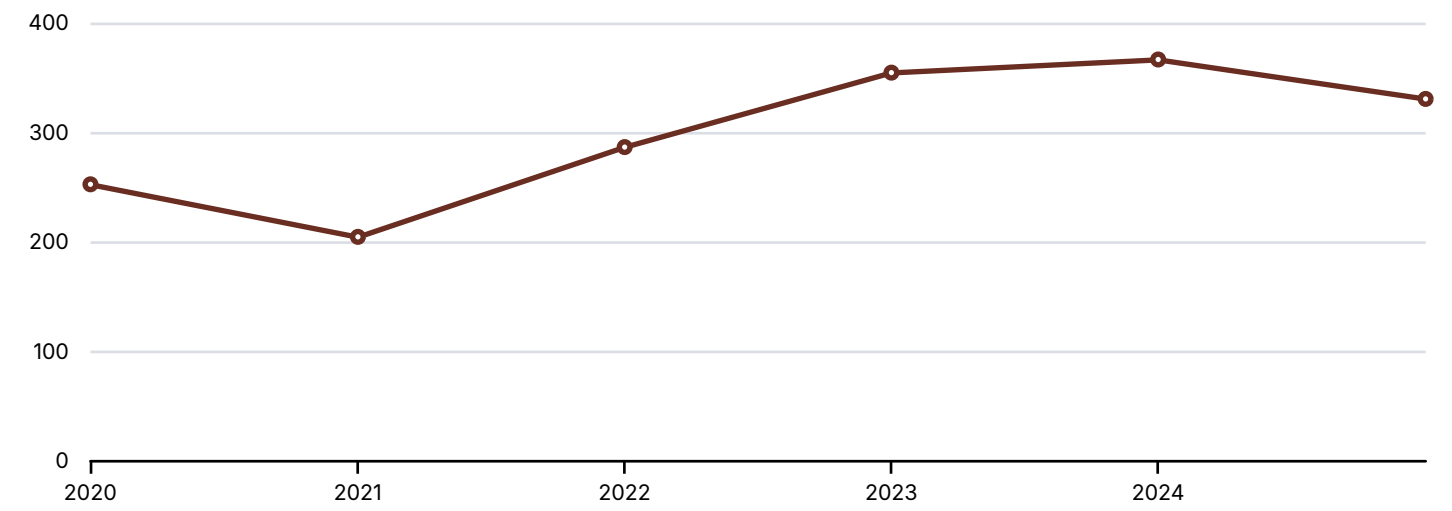
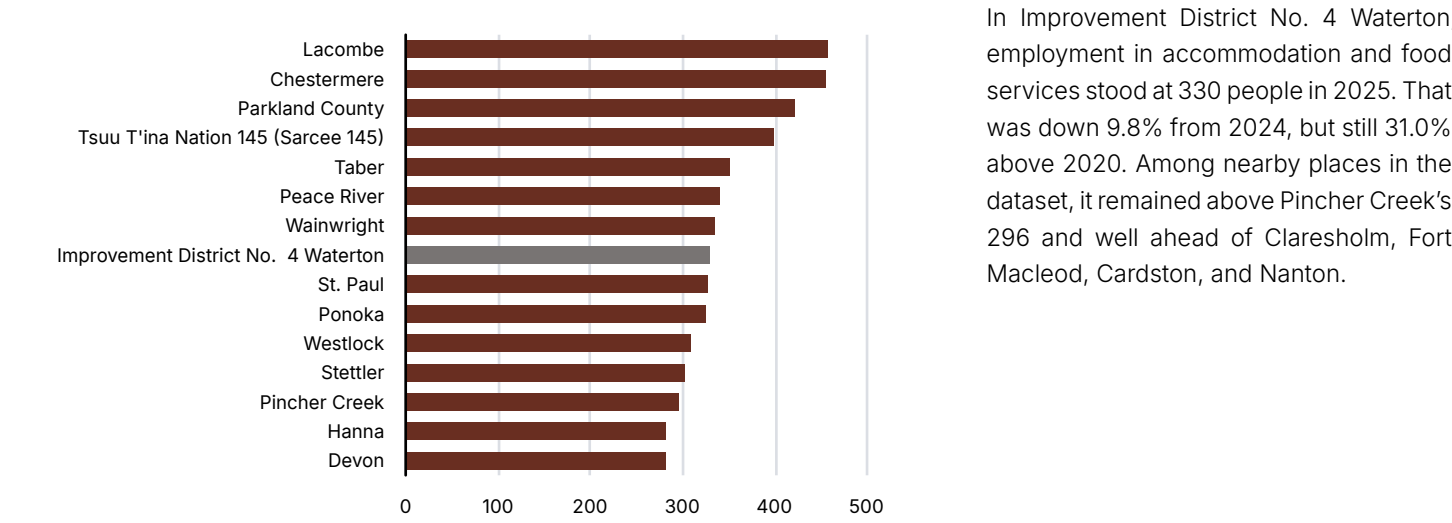


Figure 8.1: Shows the number of jobs in a specific industry sector. It helps indicate the scale of that sector within the local economy. (Improvement District No. 4 Waterton, 2020-2025)²

Employment in accommodation and food services in Improvement District No. 4 Waterton shows a clear rise and recent pullback. The sector counted 252 jobs in 2020, fell to 204 in 2021, then rebounded to 286 in 2022 and 354 in 2023. It edged higher again to 366 in 2024 before easing to 330 in 2025. That left employment 30.9% above 2020, despite the 9.8% decline in the latest year. The pattern suggests a sector that expanded strongly after 2021, then entered a more moderate phase of change.



In Improvement District No. 4 Waterton, employment in accommodation and food services stood at 330 people in 2025. That was down 9.8% from 2024, but still 31.0% above 2020. Among nearby places in the dataset, it remained above Pincher Creek's 296 and well ahead of Claresholm, Fort Macleod, Cardston, and Nanton.

Figure 8.2: Comparison of Employment in Sector with other locations (Improvement District No. 4 Waterton, 2025)²

Establishments in Sector by Number of Employees

In 2025, establishments were concentrated in the 20 to 49 employee class at 3 businesses, down 40.0% from a year earlier but up 50.0% over five years. The 5 to 9 employee group held 2 businesses.

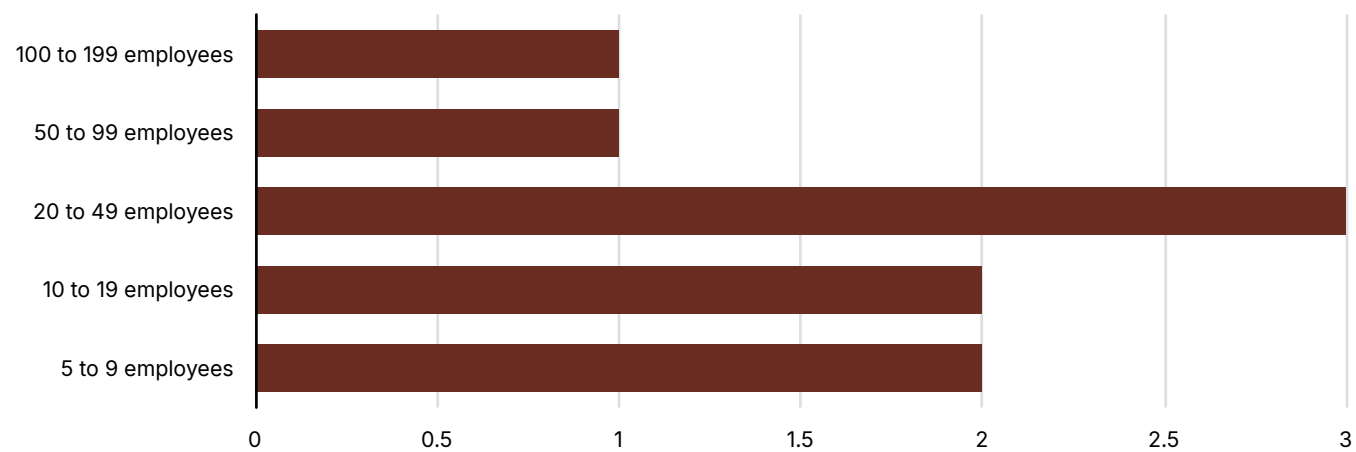
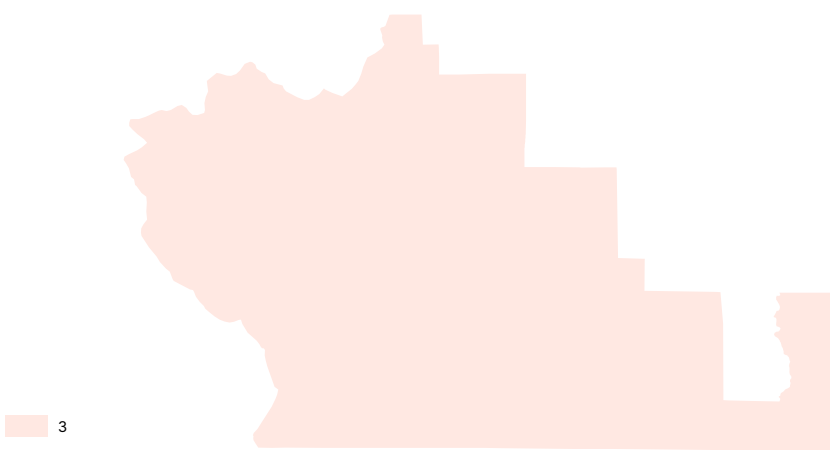


Figure 9.1: Shows the number of business establishments in a sector by employee size class. It helps indicate whether that sector is made up mostly of small or larger firms. (Improvement District No. 4 Waterton, 2025)³

In 2025, accommodation and food services establishments in Improvement District No. 4 Waterton were concentrated in small and mid-sized operations. The largest group was the 20 to 49 employee class, with 3 businesses. The 5 to 9 and 10 to 19 employee classes each had 2, while the 50 to 99 and 100 to 199 employee classes each had 1. Recent movement was mixed. The 20 to 49 employee category fell by 40% over one year but remained 50% above its five-year level. The 10 to 19 employee class was unchanged in the past year and down 50% over five years, while 5 to 9 employees held steady over five years.



In 2025, Accommodation and food services establishments in Improvement District No. 4 Waterton are concentrated in small and mid-sized firms. The largest size class is 20 to 49 employees, with 3 businesses, while both 5 to 9 employee and 10 to 19 employee classes have 2 each. Larger groups are limited: 50 to 99 employees and 100 to 199 employees each have 1 establishment. The pattern points to a small, size-diverse local base rather than one dominated by large operators.

Figure 9.2: Distribution of Largest Group: Business Establishment Size - 20 to 49 employees (Improvement District No. 4 Waterton)³

Data Sources

1. Statistics Canada, Census Profile. Published in Dec 15, 2022.
2. Statistics Canada, Business Register; Localintel, Employment by Industry Estimates of Census Areas. Published in Mar 13, 2026.
3. Statistics Canada, Business Register. Published in Jun 1, 2025.
4. Statistics Canada, Business Register; Localintel, Employment Location Quotient by Industry Estimates of Census Areas. Published in Mar 13, 2026.

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