

2019 FVRD Outdoor Recreation Economic Impact Analysis



Background Context

- FVRD Strategic Plan, 2014-2018
- FVRD Workshop, 2017
- Federal Gas Tax Funding, 2018



Purpose and Value

- Quantify the value of outdoor recreation activities
- Offers strategic direction
- Provides investment guidance
- Insight for tourism marketing



Project t Fundin g

Consult ing Team

Collabor ation Partners

FEDERAL GAS TAX FUND



CH'ILLIWACK
BRITISH COLUMBIA



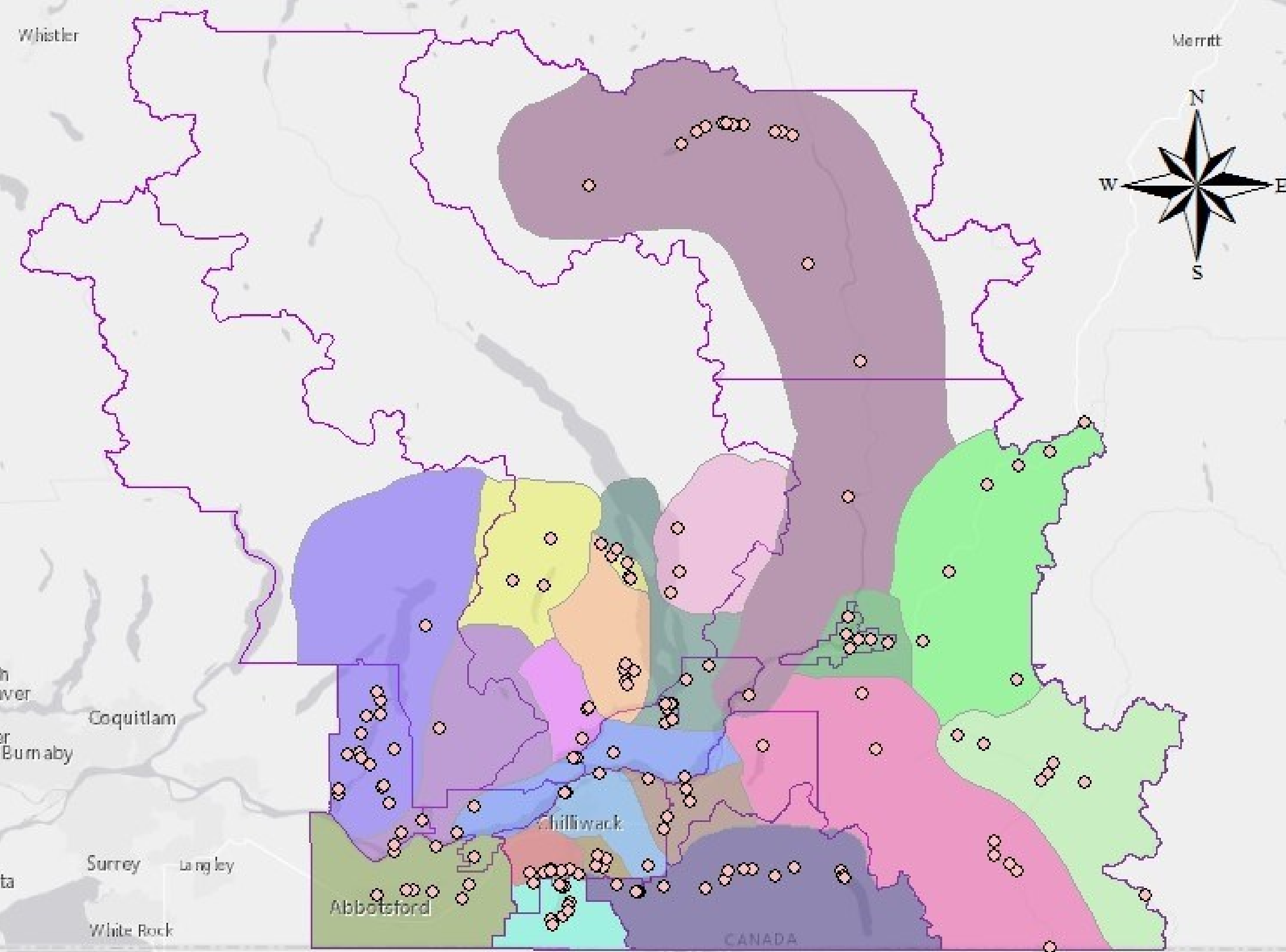
Larose Research & Strategy
Tourism. Land Use. Labour.

ALIGN
CONSULTING GROUP

With Support of:



Sts'ailes
DEVELOPMENT CORPORATION



- Entire year
- 25 activities
- 19 Survey Routes
- 131 Sites

Sampling Plan

- 613 sampling/car counting shifts
- 2,455 face-to-face surveys
- Statistical Reliability: $\pm 2.0\%$



Results

□ 7.4 million
recreation days

□ \$1.1 billion
direct outdoor
recreation
spending



Top 5 Activities by # Rec Days

- 1 
- 2 
- 3 
- 4 
- 5 

Top 5 Activities by Spending

- 1 
- 2 
- 3 
- 4 
- 5 

Economic Impact

- \$1.1 billion direct outdoor recreation spending

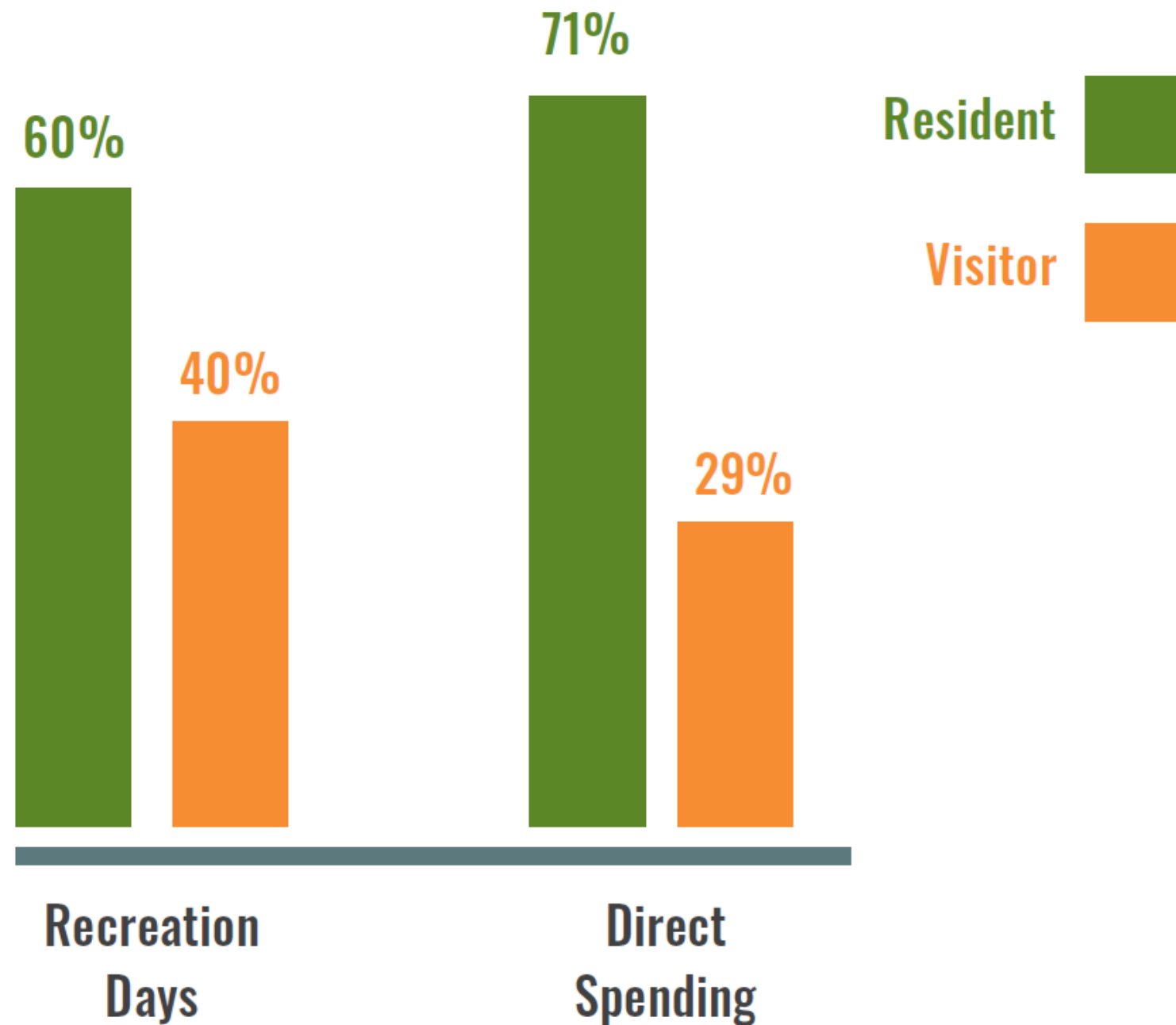
- \$1.8 billion with economic spinoffs

- \$662 million in GDP

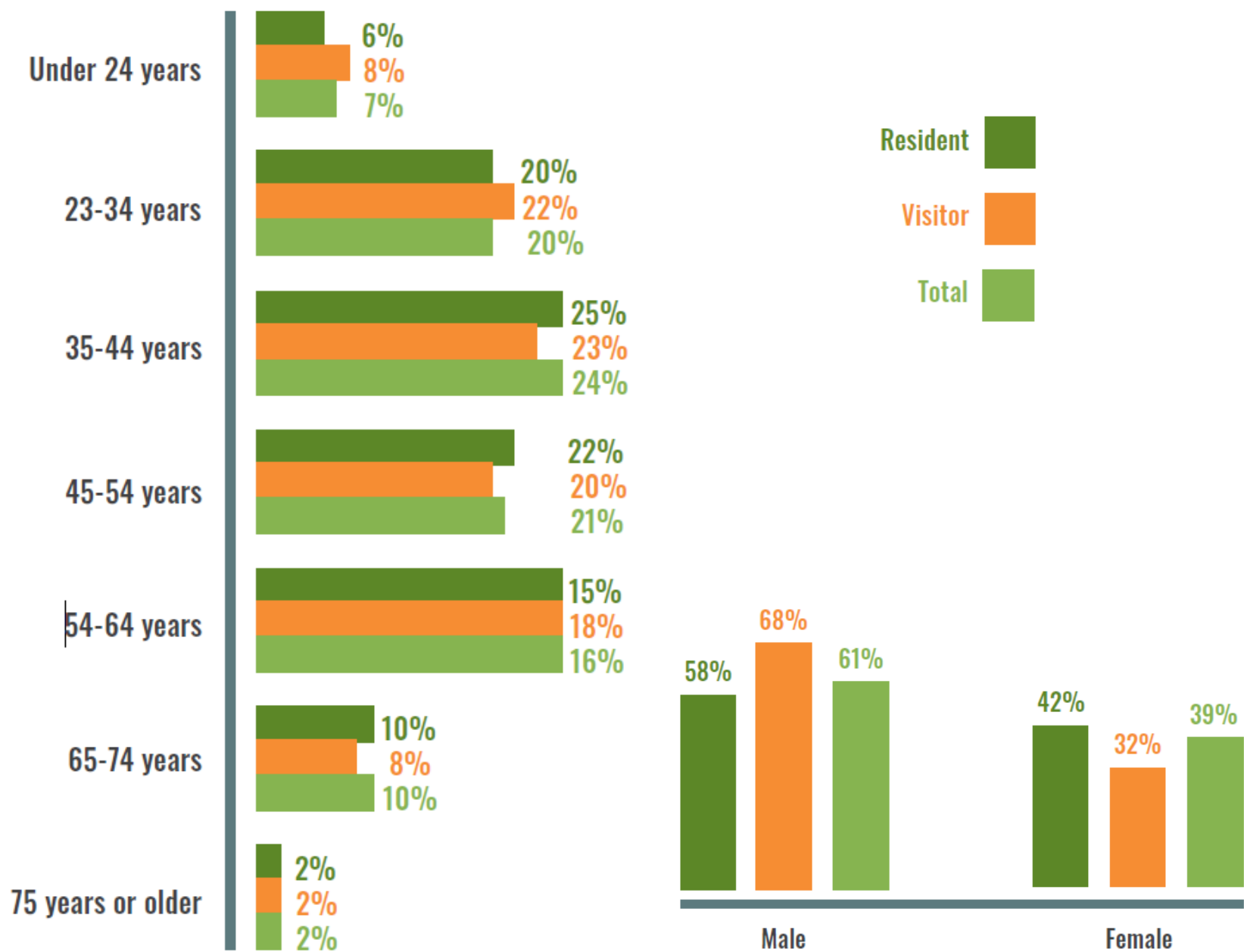
- 11,700 jobs

- \$300 million in taxes

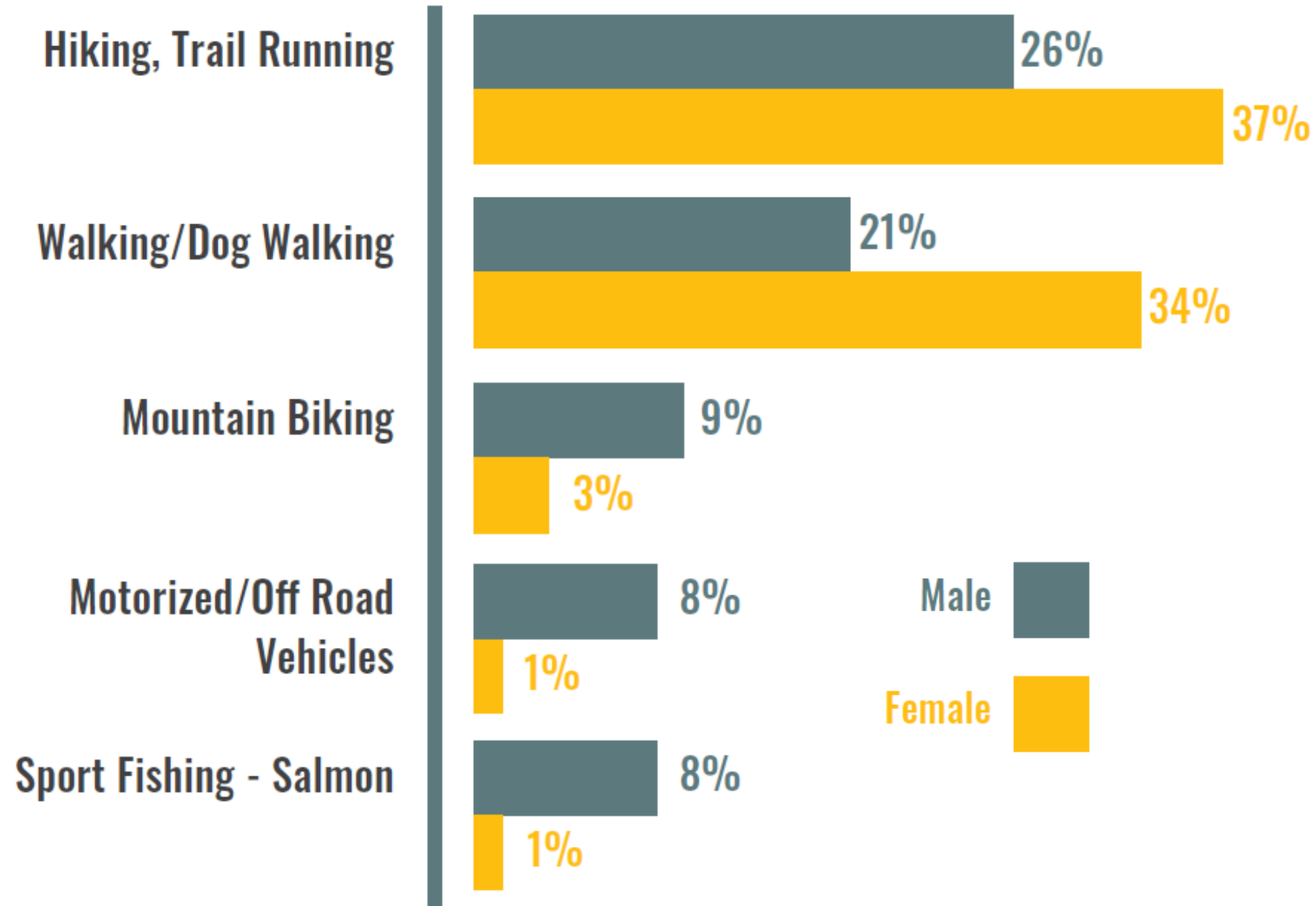
Recreation Days and Spending



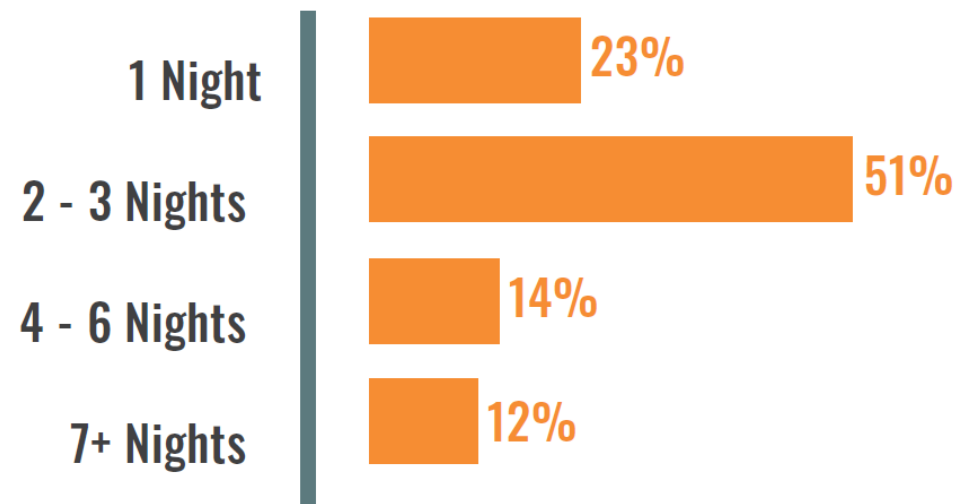
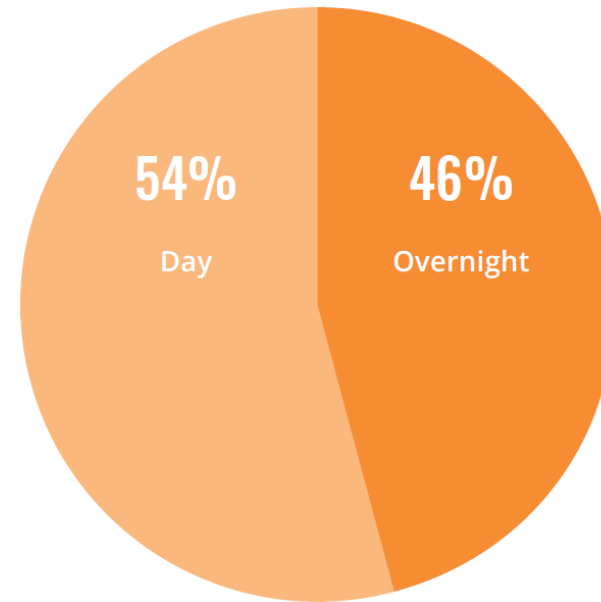
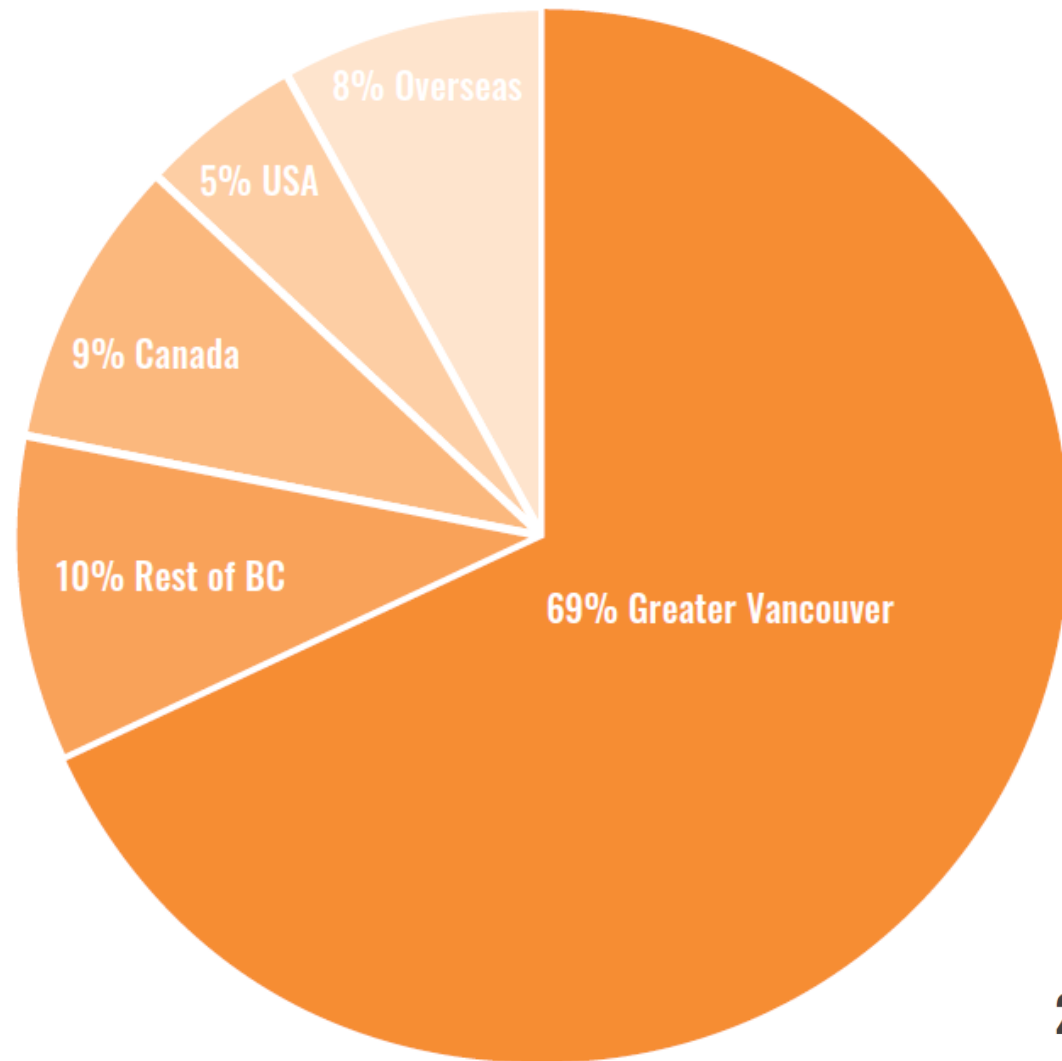
Age and Gender



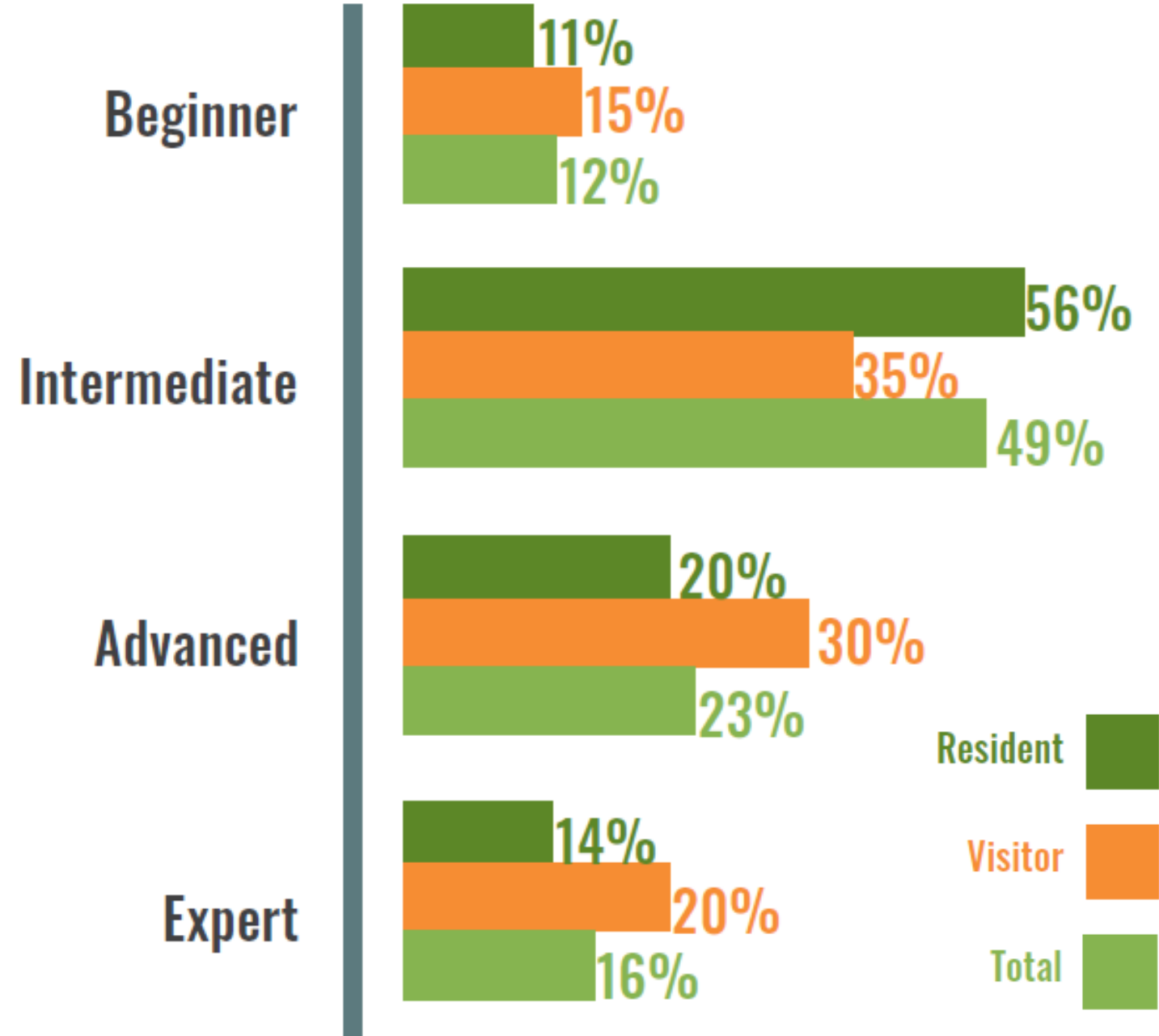
Activities by Gender



Visitor Origins



Activity Experience Level



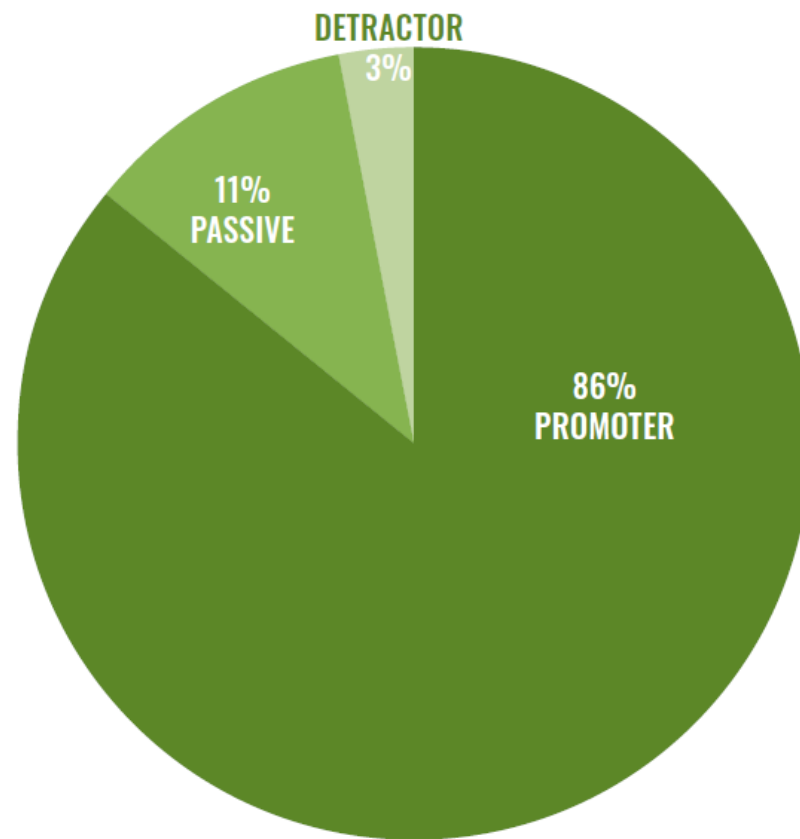
Indigenous Cultural Interpretation

- 53% of outdoor recreation participants very interested
- 34% aware of traditional lands



Net Promoter Score

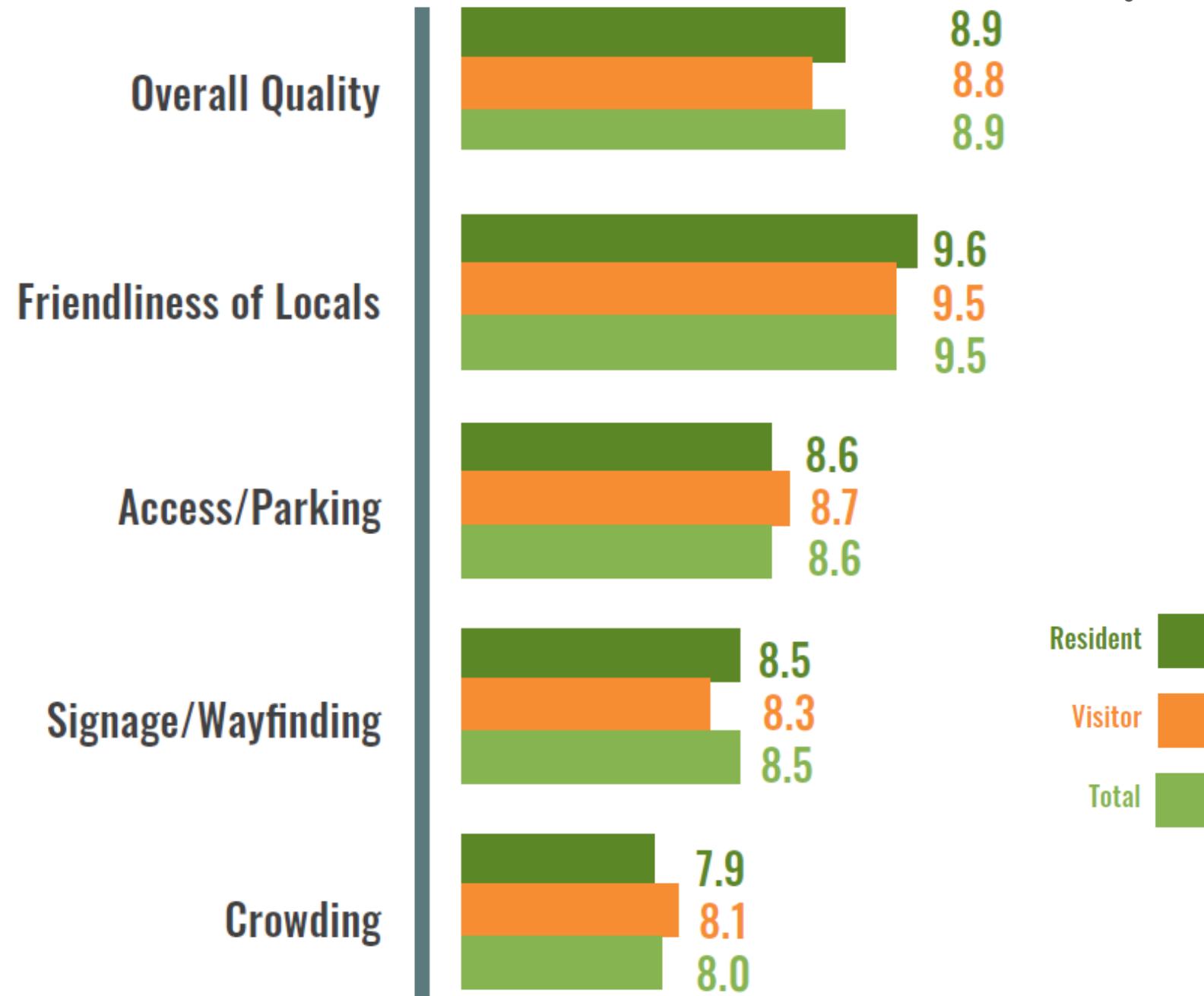
- Likelihood recreationists would recommend the region as a recreation destination to others



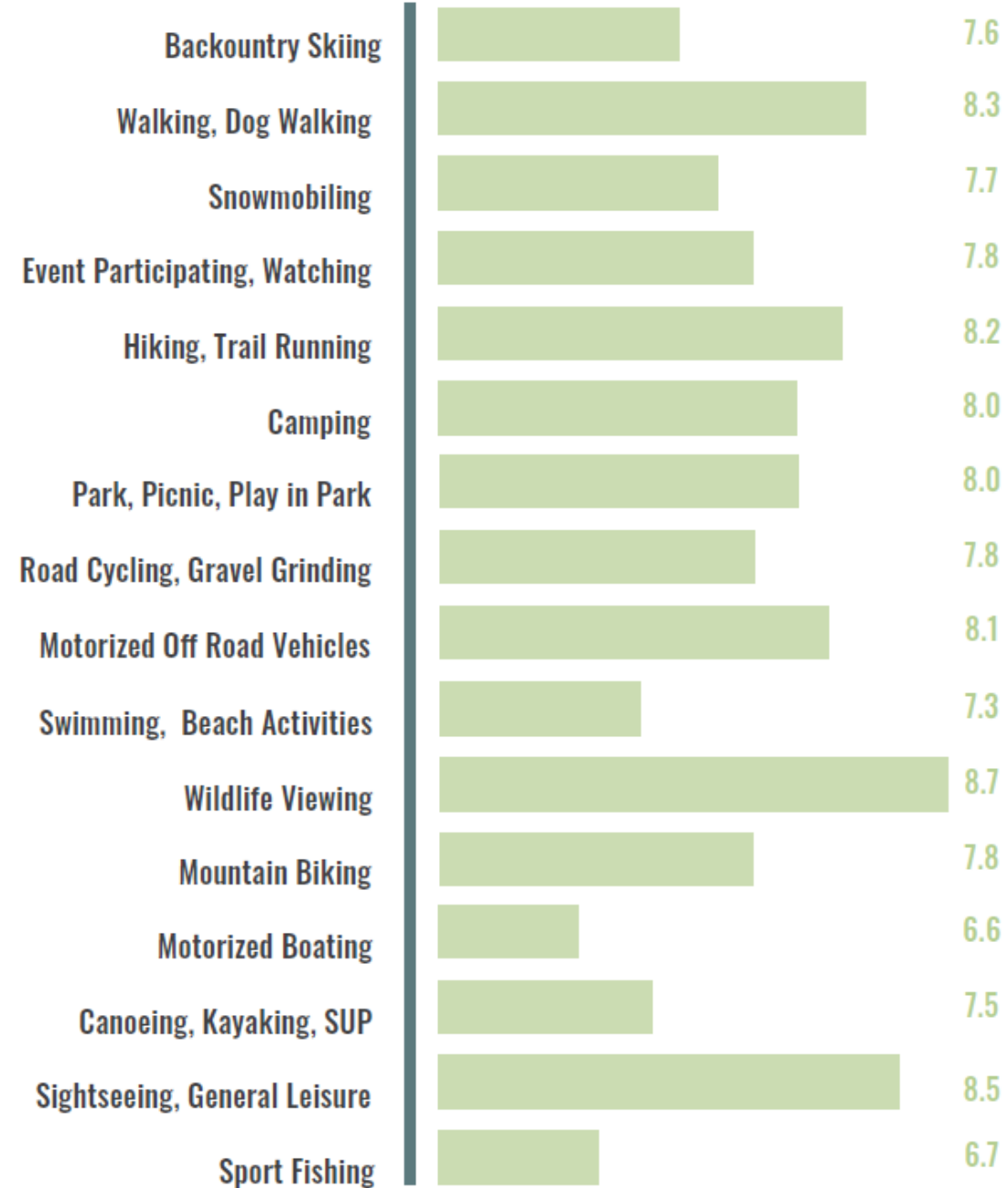
$$\% \text{PROMOTERS} - \% \text{DETRACTORS} = \text{NPS}$$

$$\text{NPS} = 83\%$$

Recreationist Satisfaction



Crowding

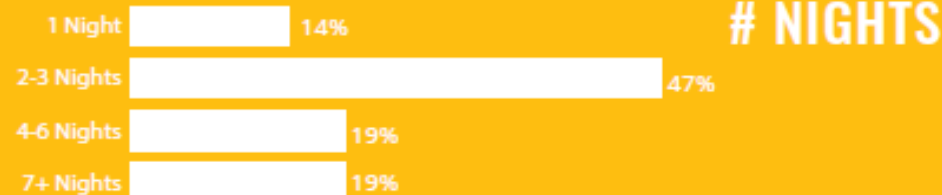


FISHING

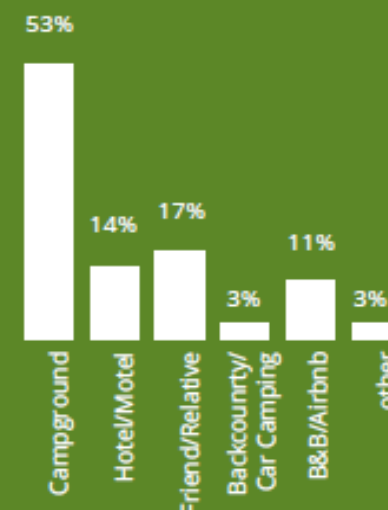
14% OF TOTAL OUTDOOR RECREATION SPENDING

VISITORS: 69% DAY | 31% OVERNIGHT

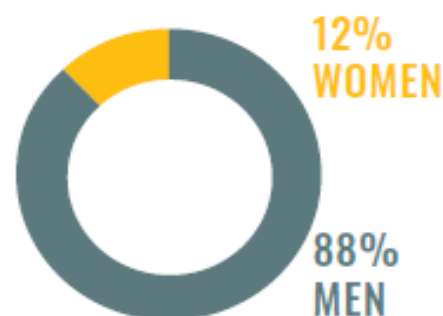
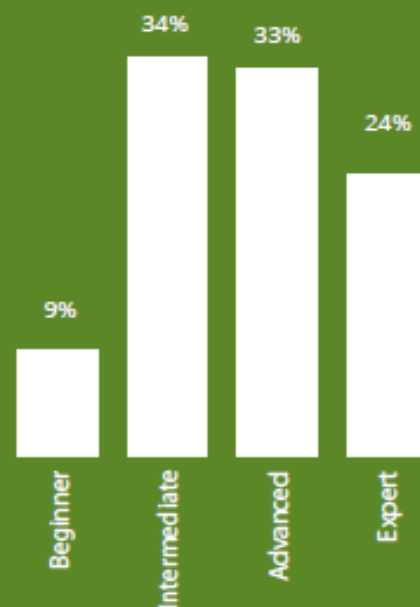
16% BELONG TO AN OUTDOOR CLUB



ACCOMMODATION TYPE



EXPERIENCE LEVEL



VISITOR AVERAGE

\$440/person/trip
\$982/group/trip

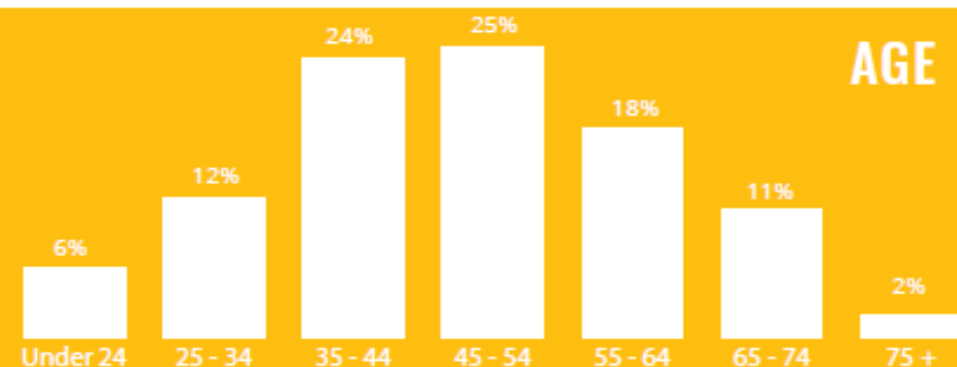


RESIDENT AVERAGE

\$311/person/day
\$694/group/day
\$4,252/person/year*

*Average resident spending per person per year includes equipment purchases, maintenance, equipment rental, guidings and transportation

AGE



SATISFACTION SCORES



* Satisfaction with outdoor recreation components (10 = very satisfied 1 = not at all)

NET PROMOTER SCORE (NPS)

68%

* Likelihood of recommending the Fraser Valley as an outdoor recreation destination

INTEREST IN INDIGENOUS CULTURE



%PROMOTERS - % DETRACTORS = NPS



Conclusions

- Recreation sector larger than believed
- Importance of “soft” recreation activities
- Verge of becoming a major destination
- Leadership opportunity for the FVRD



Thank You

□ Project Sampling Team



Recreation Sites
and Trails BC



- » Coquihalla Summit Snowmobile Club
- » Fraser Valley Mountain Bikers Association
- » Chilliwack Outdoor Club
- » Dual Sport BC
- » Chilliwack Snowmobile Club
- » BC Off-Road Motorcycle Association
- » Fraser Valley Dirt Riders Association
- » Greater Vancouver Motorcycle Club
- » Lost Traction ATV & SxS Club
- » Valley Outdoor Association
- » Hope Mountain Centre for Outdoor Learning
- » Chilliwack Search and Rescue
- » Central Fraser Valley Search and Rescue
- » Vancouver Soaring Association
- » Fishing BC

Questions

