

To: Regional and Corporate Services Committee

Date: 2020-10-27

From: David Urban, Manager of Outdoor Recreation Planning

File No: 1855-20-Outdoor Rec

Subject: 2019 FVRD Outdoor Recreation Economic Impact Analysis

RECOMMENDATION

THAT the Fraser Valley Regional District Board receive the 2019 Fraser Valley Regional District Outdoor Recreation Economic Impact Analysis;

AND THAT the study be shared widely with all project participants, member municipalities, local outdoor recreation organizations and Indigenous communities in order to ensure there is broad uptake of this first-ever analysis of the value of outdoor recreation in the region.

STRATEGIC AREA(S) OF FOCUS

Foster a Strong & Diverse Economy
Support Environmental Stewardship

PRIORITIES

Priority #5 Outdoor Recreation
Priority #4 Tourism

BACKGROUND

In late 2018, the Fraser Valley Regional District (FVRD) commissioned Larose Research & Strategy, in partnership with Align Consulting Group and with support of Laura Plant Consulting, to undertake an economic impact analysis of outdoor recreation in the entire region for all of last year. The purpose of this study was to quantify the value of outdoor recreation activities, both motorized and non-motorized, in the region since there is no specific data available. The study has provided a first-ever baseline for future analysis on the value of outdoor recreation, assisting with planning, and managing for future growth. Gathered was a comprehensive array of information from both residents of the FVRD and visitors to the region, including demographic information, activity-based expenditures within the region, and recreation experience satisfaction levels.

This study was brought before the FVRD Board this past summer but was referred back to staff to clarify the outdoor recreation sector activity expenditures in the appendix. All data was put under an enhanced validation processes with additional screening and testing to bring the probability of both systematic and random errors to within a statistically acceptable and reliable margin of error of +/- 2% and the report has been amended.

DISCUSSION

Outdoor recreation is an important driver of economic development in our region. This region-wide outdoor recreation economic impact analysis provides a first-ever comprehensive analysis of the value of outdoor recreation in the FVRD, please see Appendix A. More than 2,450 face-to-face surveys were conducted last year at 131 popular trail networks and recreation areas in the region to collect the primary data needed for this study. In addition, numerous other data sources were provided from trail and traffic counter data, from various levels of government, and outdoor recreation organizations which made for a truly collaborative study. It appears this was the largest-ever on-site recreation survey project ever conducted in British Columbia.

Overall, in 2019, there were 7,405,010 outdoor recreation days in the region, which generated \$948 million in direct spending on outdoor recreation-related products and services last year, on items such as equipment purchases and rentals, retail items, transportation, accommodations, food and beverage. When economic spinoffs are included, such as, primarily expenditures by recirculating employee salaries of recreation-related businesses throughout the local economy and expenditures by recreation-related businesses the total economic impact increases from \$948 million to \$1.5 billion. As well, this region-wide outdoor recreation sector created 10,262 jobs last year. The results of this comprehensive analysis of outdoor recreation use levels, expenditures, user characteristics, satisfaction levels, and user perceptions provides critical information to support outdoor recreation development and management in our region into the future.

COST

The Gas Tax Strategic Priorities Fund program funds up to 100% of eligible costs. The FVRD received the full amount requested of \$282,000 for the FVRD outdoor recreation economic impact analysis and management plan.

CONCLUSION

This region-wide outdoor recreation economic impact analysis provides a detailed snapshot of outdoor recreation in the region and of its many activity sectors, including their size, composition, and characteristics. The reliability of these results, due to the robust sampling program and four-season timeframe for data collection, will be invaluable for decision-makers not only in the FVRD, but all levels of government, including Indigenous and municipal governments at the local level, as well as both the provincial and federal governments. It will also serve a multitude of different purposes for destination marketing organizations, Destination BC, outdoor recreation organizations, and search and rescue groups.

COMMENTS BY:

Stacey Barker, Director of Regional Services: Reviewed and supported.

Kelly Lownsbrough, Chief Financial Officer/ Director of Finance: Reviewed and supported.

Jennifer Kinneman, Chief Administrative Officer: Reviewed and supported.