



Bridge River Valley 2013 Value of Tourism Study

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Executive Summary

The Bridge River Valley's Value of Tourism is now complete for the year 2013. The study used Destination BC's Value of Tourism statistical model to survey the region's commercial accommodation sector. The questionnaire gathered data from business accommodations, which were asked to provide a snapshot of their 2013 performance data. Destination BC's Research, Planning, & Evaluation then quantified the data and applied local indicators to generate an estimate of the visitor volume and direct expenditures on tourism in the Bridge River Valley.

Overall results estimate that a total of 25,000 people visited the Bridge River Valley in the study period. Of these, 15,000 visitors stayed in commercial accommodation during the study period, 200 people spent time visiting friends and relatives, and an additional 10,000 people passed through the community as day visitors. Total visitation when combined with average length of stay and average total spend per visitor per trip, generates "Annual Direct Visitor Expenditures" in the Bridge River Valley. In 2013, this is estimated to be \$2,400,000.

The Value of Tourism expenditure results are significant because they quantify what has long been an unknown for the Bridge River Valley. The Value of Tourism study done for the 2013 calendar year is significant in that it provides a reliable baseline on the total value of tourism in the area that is founded on a valid research framework.

The Value of Tourism results support continued planning for the growth of tourism in our area by showing its current significance to the overall economy. This will assist in generating local buy-in from residents and businesses alike in seeking to build the visitor economy in the area.

The statistics will be used now and in the future as a benchmark to measure how well the steps taken as part of our Community Tourism Foundations planning process are working.

We gratefully acknowledge that this project was funded and supported by Destination British Columbia. Cara DeMare administered the project with support from the Bridge River Valley Community Association.

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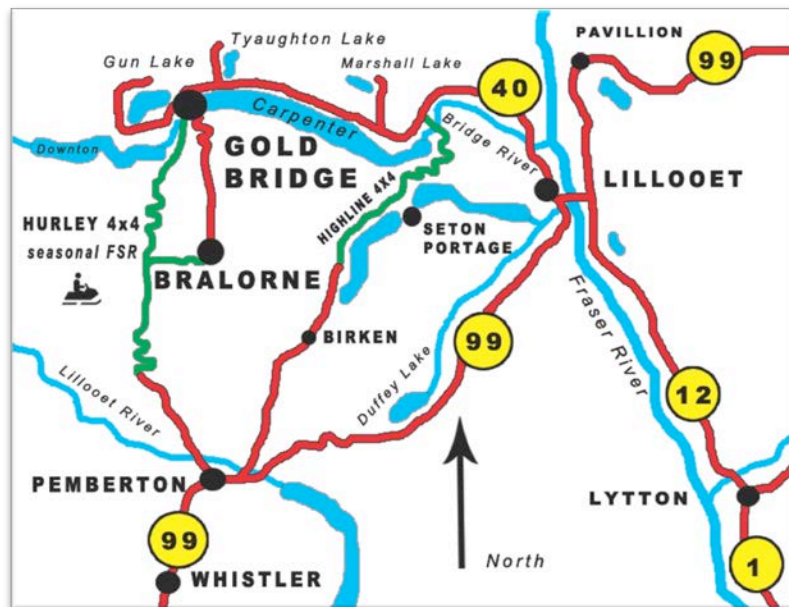
Understanding the Area of Study

Situating the Bridge River Valley

The Bridge River Valley (BRV) is a remote mountain community focused on outdoor recreation, family and the environment. Located 300 km north of Vancouver and 100 km west of Lillooet, the BRV is nestled on the eastern edge of the Coast Mountains and the southern edge of the Chilcotin Mountains. Broad valleys and ridges, numerous lakes and rivers, sub-alpine meadows and mountain peaks characterize the mountainous region making it the perfect outdoor wilderness recreation area.

Outdoor enthusiasts flock to the area year round to enjoy a wide range of wilderness activities. Summer adventures include mountain biking, hiking, camping, horseback riding, boating, fishing and hunting. In the winter, the area offers unparalleled opportunities for snowmobiling, ski and snowboard touring, heli-skiing and boarding, snowshoeing and ice fishing.

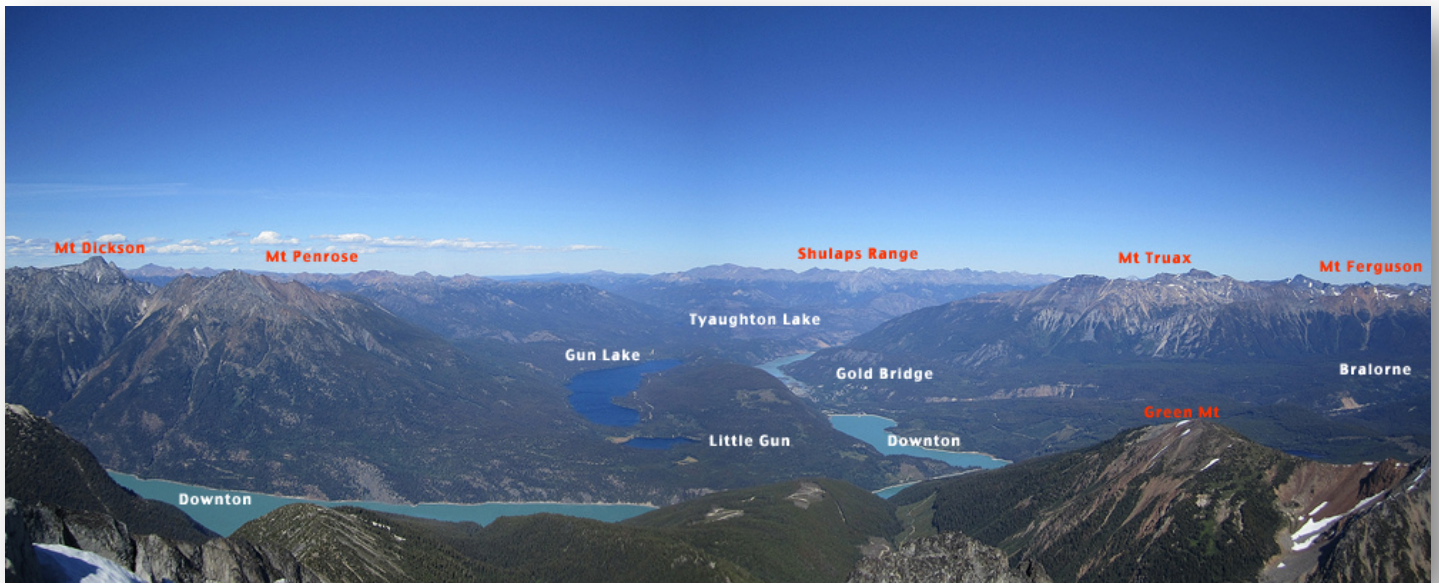
The BRV can be accessed via Lillooet by Road 40, which is maintained year round and is a mix of gravel and paved surfaces. Via Pemberton, the BRV can be accessed using the Hurley Wilderness Forest Service Road through the summer months. This is a 4 x 4 road. Please see the map below for routes in and out of the BRV.



Map of Access Roads into Area A

This mountain community is a “community of communities” with a small town feel. The BRV consists of two small towns, Gold Bridge and Bralorne, and the populated

areas of Gun Lake, Tyaughton Lake, Gun Creek, and Marshall Lake. Please see the image below for a panoramic view of the Bridge River Valley.



Panoramic of Bridge River Valley

According to the 2011 Canada Census, the population is 224 people. The area is home to long time residents with mining roots, new and established part-time residents, and young families new to the area.

The BRV is found within the traditional territory of the Upper St'at'imc Nation. Both the Xwisten and the Tsalalh communities frequently use the Upper Bridge River Valley, which has supported the hunting, gathering and cultural traditions of these communities for thousands of years. In the 1850's settlers arrived in the region in search of gold. The trend continued until the 1930's when the Bralorne Mine was the largest gold-producing mine in Canada. It is estimated that in the 1930s and '40s there were as many as 5,000 people living in the area.

The BRV is located in the Electoral Area A district of the Squamish-Lillooet Regional District with a size of 3,715.03 square kilometers. The average taxable property has an assessed value of \$243,161 with the total taxable property assessment being \$189,422,519 for the area. ¹

The economy of the BRV is supported mainly by tourism, mining, forestry, and hydroelectricity via BC Hydro's Bridge River Hydroelectric system and some independent power projects.

¹ Squamish Lillooet Regional District 2015 <http://www.slrd.bc.ca/about-us/slrd-electoral-areas/electoral-area-a>

The Bridge River Valley Community Association

The Bridge River Valley Community Association (BRVCA) led the effort to complete the Value of Tourism Project in the Bridge River Valley.

BRVCA is a non-profit organization that dedicated to giving voice to the unique people of the Bridge River Valley, balancing growth to ensure a viable future, protecting the natural beauty and resources of the valley, building a sustainable community in the wilderness and keeping the history of the Bridge River Valley alive.

BRVCA acts as an umbrellas organization, driven by the interests of the people, which encourages autonomous group development and promotes the economic well-being of the Bridge River Valley. It offers advertising, shared insurance, one-stop-shop administration, year-round visitor services, funding accessing and much more.

Mission Statement:

We Provide the Bus, You Drive!

Guiding Principles:

- To support new committees, societies & groups as autonomous enterprises who have to follow a few rules, such as financial accountability, that we all build & decide on together
- To efficiently pool resources to simplify committee & group efforts
- To consolidate legal/financial responsibilities of societies & delegate to the BRVCA board
- To save volunteers from attending meetings so time can be spent making tangible accomplishments
- A way to protect activities & groups with liability insurance & to assist monetarily with routine practices & events
- A single point of contact for the Bridge River Valley as a “one stop shop” community services & administrations office, central repository of information & a strong advocate on community issues
- To make a difference when & where it really counts

Introduction

Tourism in British Columbia is one of the largest and fastest growing sectors of the provincial economy generating \$13.9 billion in revenue and creating 132,200 jobs in 2013².

In the Bridge River Valley, little to no research on tourism in the area has been done. In 2014 a Community Tourism Plan for the Bridge River Valley was updated. The plan's objective was to

Objective: Within the context of the community vision of sustainability, increase local revenues from visitor spending and by building visitor demand, create opportunities for investment by new and existing entrepreneurs who may choose to relocate to the region with their families.

The plan defined a direction for marketing and promotional awareness of the Bridge River Valley as a destination in identified target markets and to establish clear next steps or priorities that will lead to increased visitation and associated spending with local businesses.

The plan noted that most of the foundational infrastructure was in place and the emphasis could now change to identifying target markets and building awareness. Consequently, the Bridge River Valley was ready to develop a strategic marketing plan to promote the world-class experiences it has to offer visitors. The initiatives noted in the plan included access/infrastructure strategies, visitor experience development strategies and marketing/promotional strategies. In total 17 strategies were recommended to achieve the noted objective.

The Value of Tourism project for the Bridge River Valley will provide a standardized and recognized benchmark, which can be used to measure the success in the above strategies laid out in the Community Tourism Plan.

² Destination BC Value of Tourism 2013 www.destinationbc.ca

Tourism British Columbia's Value of Tourism Pilot Project

Background

Having defensible estimates of tourism's contribution to a community is central to developing an informed planning approach, strengthening the support of community stakeholders and local government, and encouraging an appreciation of tourism's economic development potential. In 2005 Destination British Columbia introduced the Community Tourism Foundations® (CTF) Program, which was designed to assist communities in developing their tourism potential. In order to track the performance of communities participating in the CTF Program a model was developed by Research, Planning, & Evaluation, Destination British Columbia. The Value of Tourism model provides a structured, consistent approach to estimate the volume and value of tourism, specifically the objective of the model is:

“To provide a conservative and credible estimate of visitor volume and direct tourism expenditures within a community.”

The core data collection component of the model is an accommodation survey to gather the most recent annual performance data from commercial accommodation operators (including campgrounds and RV parks). In addition, recreation and camping site, a regional trail, and provincial trail volume and occupancy were estimated using available BC Parks data. This information is then combined with local, regional, provincial and national tourism indicators to provide an estimate of the total number of visitors (overnight, day and visiting friends & relatives) and their expenditures in the community.

The Value of Tourism model can be applied to communities throughout the province. As of November 2015, nine communities have successfully completed the Value of Tourism model: District of North Vancouver, Lillooet, Squamish, Fore Nelson (Northern Rockies), Fort St. John (North Peace), Dawson Creek (South Peace), Quadra Island, Smithers, and Terrace. As of November 2015, Bridge River Valely will be added to this list of communities.

Methods

A complete inventory of all commercial accommodations in the community (Fixed-Roof and RV/ Campgrounds) is required to proceed with the Value of Tourism model. Once the inventory is finalized, all commercial accommodations are approached to participate. Participating accommodation properties are asked to provide monthly information for the most recent year, which includes:

- 1) Number of Rooms/Sites Available;

- 2) Total Occupied Room/Site Nights;
- 3) Average Achieved Daily Room/Site Rate;
- 4) Average Length of Stay; and the
- 5) Average Party Size.

The collected information is additionally split between business and leisure guests for fixed-roof accommodation properties and tenting and RV guests for campground/RV parks. The completed form is either faxed or emailed to Research, Planning, & Evaluation Destination British Columbia or to the Project Coordinator in the community. All the data collected is kept strictly confidential and individual accommodation information is not published.

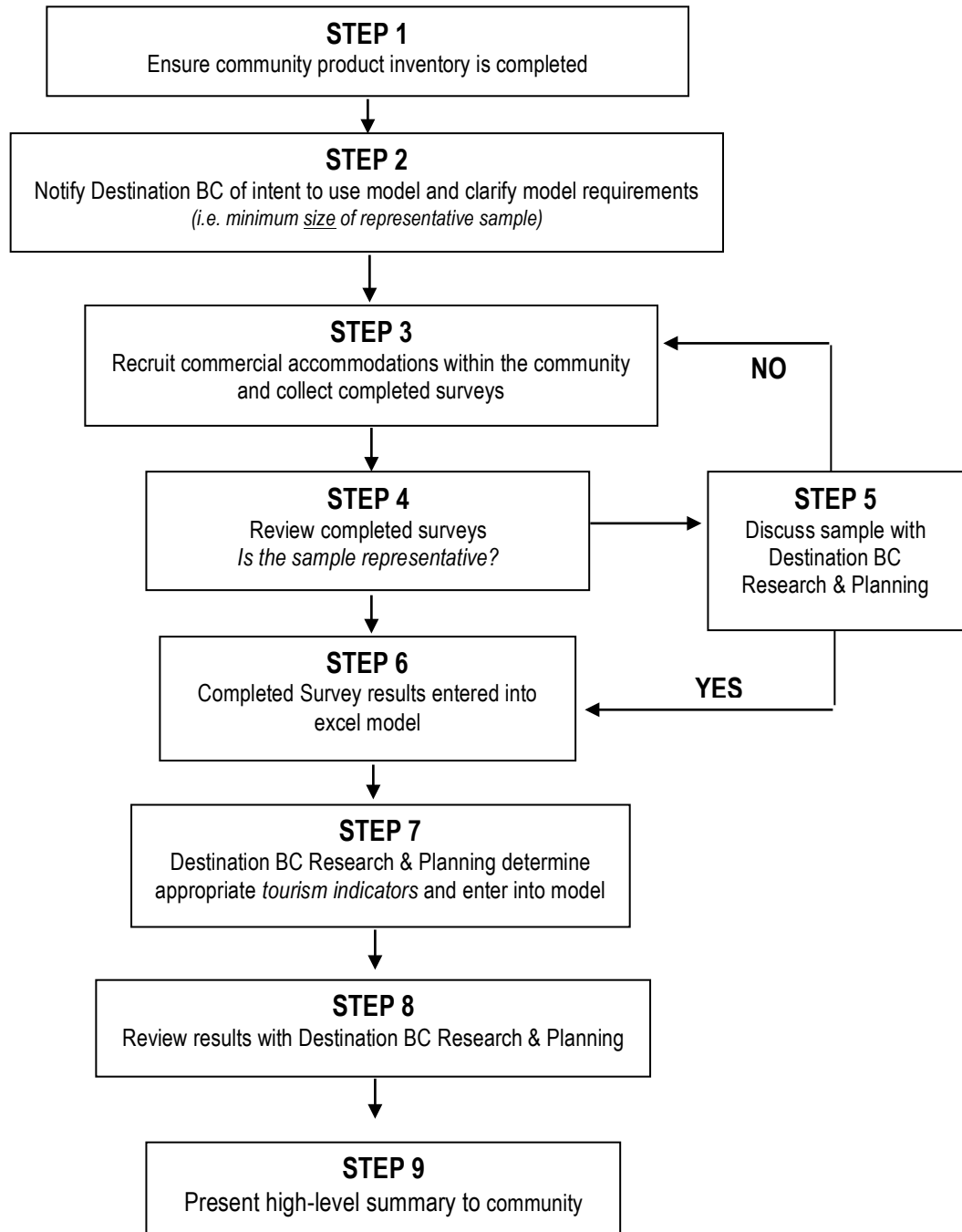
The goals of the accommodation survey process include:

- 1) To collect surveys from at least 50% of the total room/site base;
- 2) To collect surveys from at least 50% of each accommodation type (i.e. hotel, motel, B&B, campground/RV parks); and
- 3) Within each accommodation type, to collect a representative sample (i.e. small/large establishments, and other community specific factors).

Once a representative sample of commercial accommodations is obtained the surveys can be entered into the Value of Tourism model. After data entry, Research, Planning, & Evaluation Destination British Columbia implements the Value of Tourism model, selecting appropriate regional, provincial and national tourism indicators to be used for estimating the visitor volume and direct tourism expenditures to the community. The Value of Tourism model provides an estimate of direct visitor spending only and does not estimate the economic impact (GDP, employment, etc.) of tourism within a community.

The DBC Value of Tourism survey methodology follows the path outlined on the flowchart below.

Determining the Volume and Value of Tourism



Results

An overall total of 38% of fixed roof accommodations room base and 66% of RV/Campgrounds site base participated in the project. The total visitation was 25,000 people and resulted in Annual Direct Visitor Expenditures of \$2,400,000³. For more details, please see the figure that follows.

A total of 130 rooms and sites are in the inventory used to determine the Value of Tourism in the Bridge River Valley. Across the Bridge River Valley 147 Fixed Roof rooms and RV/ Campsites were identified in the original inventory of properties to be surveyed.

The most common reasons for not participating in the survey were; lack of buy in to being part of a larger effort to improve and expand visitations in the area, in some cases, not keeping this type of information at hand (small mom/pop operations), and lack of understanding of the reasons for having statistical information.

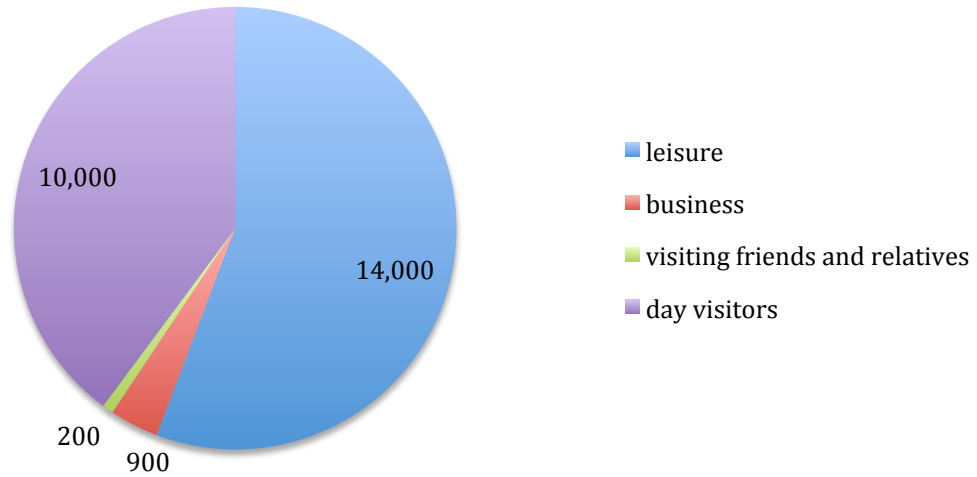
Limitations

- 1) This Value of Tourism model is only relevant for the 12-month period from January to December 2013. The results should not be applied to any other time frame.
- 2) The accuracy of the model depends on how well the tourism characteristics and expenditure data represent actual spending and behavior patterns in the Bridge River Valley during the time of the study.
- 3) The model is dependent upon the data provided by local commercial accommodations and therefore is based on the quality of this data.
- 4) The model results for the Bridge River Valley should not be applied to other areas.
- 5) The Value of Tourism model provides an estimate of direct visitor spending only and does not estimate the economic impact (GDP, employment, etc.) of tourism within a community.
- 6) Results from the Value of Tourism model are to be used with caution, due to the stated limitations of the model.

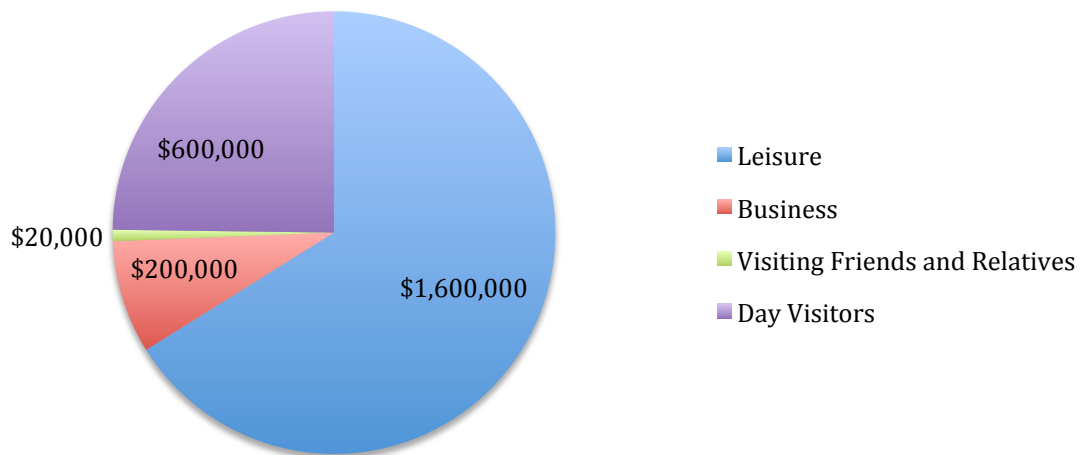
³ "The Estimates of Direct Visitor Expenditures are determined from information collected from commercial accommodation properties within the community and from indicators collected in visitor surveys including those conducted by Destination British Columbia and Statistics Canada (Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS)). Therefore, the data listed by type of visitor is not multiplied together to determine the total direct visitor expenditures by visitor type, but provides information regarding the characteristics of each traveller type."

Summary Graphs

Number of Visitors per Visitation Group



Total Expenditures per Visitation Group



An Estimate of 2013 Tourism Volume and Direct Expenditure in Bridge River Valley

Estimates of Visitors

Type of Visitor	Volume of visitors
Fixed Roof (Hotels, Motels, B&B)	
Leisure	6,000
Business	1,000
RV & Campground	8,000
Total Visitors in Commercial Accommodations	15,000
Visiting Friends & Relatives (VFR)	200
Day Visitors	10,000
Overall Visitation	25,000

Estimates of Direct Visitor Expenditures

Type of Visitor	# Visitors	Average total spend (\$) per visitor per trip	Totals (\$)
Leisure (commercial accommodation)	14,000	\$120	\$1,600,000
Business	900	\$270	\$200,000
Visiting Friends & Relatives (VFR)	200	\$90	\$20,000
Day Visitors	10,000	\$60	\$600,000
Annual Direct Visitor Expenditures			\$2,400,000

***NOTE:** The Contribution of Tourism figures presented above provide a conservative estimate of the size and value of the local tourism industry. They are prepared largely from information collected from tourism businesses within the community and as such have their limitations.*