



BRITISH PACIFIC PROPERTIES

Impact of Mountain Biking / Trail System on the North Shore - Business Survey

May 2017

Background

The Mountain Bike Tourism Association (MBTA), in partnership with the Canadian Sport Tourism Alliance (CSTA) surveyed mountain bikers to gather data to prepare an economic impact study of mountain biking in the Sea to Sky Corridor, including the communities of North Vancouver, Squamish, and Pemberton. The CSTA, working with Tourism Whistler and Whistler / Blackcomb, prepared studies of the Whistler trail system, the Whistler Bike Park and Crankworx in 2015.

New to the 2016 study was a measurement of the impact of businesses associated with mountain biking on the North Shore. While difficult to ascribe a direct causality of the trail system being the reason business located on the North Shore, the trail system provides a critical mass of mountain bike and outdoor enthusiasts, along with a workforce that is more likely to be passionate about mountain biking.

As part of the research the NSMBA distributed a survey developed by the MBTA / CSTA, asking basic questions about employment and sales associated with mountain biking. The survey was sent to 61 NSMBA business members. Only 14 business responded, thus there were some gaps in the data. Data gaps were filled through secondary research online.

In preparing the estimate of economic activity supported by mountain biking, this study includes the two following areas where credible data could be produced:

- Expenditures by local residents at retail stores and restaurants on the North Shore
- Direct employment and wages & salaries paid by North Shore businesses associated with mountain biking



Inputs

Annual Retail Expenditures of North Shore Residents

The spending information included below was collected as part of the North Shore Mountain Bike survey and was collected on a 'per ride' basis. Results were aggregated to reflect a seasonal and annual total. Note that the expenditures below are for North Shore residents only and does not include the tourism impact of visitors who are included in the main North Shore report.

	Per season	Aggregate
Restaurants / Pubs / Bars	\$229.56	\$2,283,918
Other Food & Beverage	\$54.09	\$538,129
Bike Shops (Bikes, Parts & Service)	\$581.14	\$5,781,754
Other Shopping	\$27.67	\$275,322
Local transportation	\$100.00	\$994,912
Total	\$992.47	\$9,874,035

Employment / Wages & Salaries

As previously noted, a survey was conducted among North Shore businesses who were associated with the NSMBA. Total employment numbers were obtained from the business survey and other sources and adjustments were made to reflect business impacts associated with mountain biking. Retail impacts were adjusted to account for impacts already covered through direct retail expenditures.

	Estimated MTB Employment	Estimated MTB Salaries
Manufacturers	155	\$7,625,000
Retailers	75	\$1,500,000
Others	20	\$600,000
Total	250	\$9,725,000

Economic Impact Results

Combining the retail expenditures along with the wage and salary impacts associated with mountain bike businesses yields an initial expenditure of \$19.6 million, supporting \$27.7 million in economic activity in British Columbia including \$24.4 million of economic activity throughout the North Shore. Mountain biking supported direct, indirect and induced wages and salaries of \$14.7 million in the province along with 337 jobs, of which 314 jobs and \$13.1 million in wages and salaries were supported in the North Shore.¹ The total net economic activity (GDP) generated by local resident retail expenditures and North Shore businesses associated with mountain biking reached \$19.4 million for Canada as a whole; \$18.2 million for British Columbia and \$13.1 million on the North Shore.

Businesses and locals on the North Shore also supported tax revenues totaling \$4.4 million when considering Canada as a whole comprised of federal government tax revenues of \$2.1 million, provincial tax revenues of \$2.0 million and \$236,000 in municipal taxes in British Columbia including \$159,000 of municipal taxes on the North Shore.



	North Shore	British Columbia	Canada
Initial Expenditure	\$19,599,036	\$19,599,036	\$19,599,036
GDP	\$15,386,425	\$18,159,467	\$19,431,455
Wages & Salaries	\$13,119,511	\$14,671,229	\$15,361,817
Employment	314.5	337.1	354.1
Industry Output	\$24,428,284	\$27,756,946	\$30,462,362
Total Taxes	\$3,481,613	\$4,129,570	\$4,387,116
Federal	\$1,656,101	\$1,942,214	\$2,068,917
Provincial	\$1,666,903	\$1,951,506	\$2,049,065
Municipal	\$158,609	\$235,850	\$269,133

¹ Jobs reported in this study refer to the number of jobs, vs. full time equivalent (i.e.: two people working half time in a job that typically features half time employment would represent two jobs or one FTE). Additionally, the direct employment effects are generally extra shifts or overtime for existing workers rather than new employment.

Economic Impact Results - Detailed

North Shore		British Columbia		Canada	
Initial Expenditure		\$19,599,036		\$19,599,036	
Gross Domestic Product					
Direct Impact		\$12,165,231		\$12,881,050	
Indirect Impact		\$906,410		\$1,529,037	
Induced Impact		\$2,314,785		\$3,749,380	
Total Impact		\$15,386,425		\$18,159,467	
Industry Output					
Direct & Indirect		\$20,897,238		\$22,037,515	
Induced Impact		\$3,531,046		\$5,719,432	
Total Impact		\$24,428,284		\$27,756,946	
Wages & Salaries					
Direct Impact		\$11,626,181		\$12,100,831	
Indirect Impact		\$583,703		\$991,114	
Induced Impact		\$909,626		\$1,579,284	
Total Impact		\$13,119,511		\$14,671,229	
Employment (Full-year jobs)					
Direct Impact		290.9		299.0	
Indirect Impact		8.4		14.8	
Induced Impact		15.2		23.3	
Total Impact		314.5		337.1	
Taxes (Total)					
Federal		\$1,656,101		\$1,942,214	
Provincial		\$1,666,903		\$1,951,506	
Municipal		\$158,609		\$235,850	
Total		\$3,481,613		\$4,129,570	