

Economic Impact of Mountain Biking in Squamish

Executive Summary

Commissioned and Conducted by: SORCA

Report Date: January 3, 2014

Introduction

In an effort to reliably quantify the economic benefit of mountain biking to Squamish, SORCA executed a study. We used automated trail counters to measure 1339 riders on three trail locations (Half Nelson, Cam and Phils, and Jacks Trail). We interviewed 451 of these riders. This took place over the Labour Day long weekend (Saturday Aug. 31 to Monday September 2, 2013).

Key Findings:

Squamish trails are primarily used by non-residents and are a driver of significant tourist traffic.

- **75%** of riders interviewed were visitors. That number jumps to **85%** on Half Nelson, highlighting the value of investing in “landmark” trails.
- Based on the counted traffic, we project conservatively that, on weekends alone, at least **25,000** riders came to Squamish to ride. A mid-range projection is **37,500**.
- Note: These estimates **DO NOT** include any weekday traffic. (For an estimate of weekday traffic doubling the numbers would be reasonable). In addition, this projection **DOES NOT** take into consideration the impact of major race events like Test of Metal series and BC Bike Race. We know that April/May/June have much higher trail usage as this is the key race season training period.
- Compared to the 2006 Economic Impact Study, traffic has **quadrupled** from an estimated 591 riders per week to an estimated 2600.

Estimated # of visiting riders over 26 weekends			
	Counted	Projected Conservative	Projected Mid-range
Long Weekend	1011	1348	2022
Regular weekend	667	889	1334
Total for 26 weekends		24965	37447

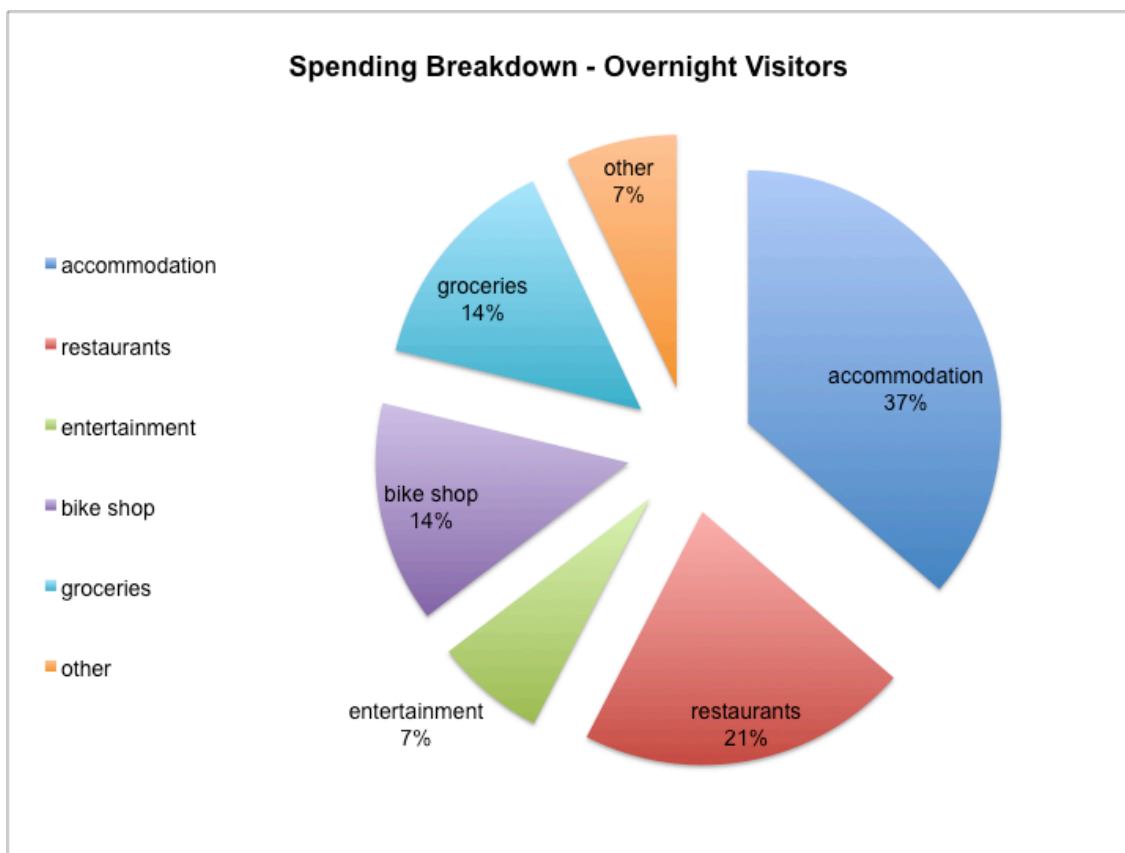
Note: Conservative projection assumes we counted 75% of total riders on all trails. Realistic projection assumes we counted 50% of total riders on all trails.

Visiting Mountain Bikers inject a staggering amount of spending directly into our local economy.

- **40%** of visitors stayed overnight. Average length of stay was **2.5** nights.
- Overnight visitors spend reported spending **\$215** per person per trip. Day Visitors reported spending **\$37** per person per trip.
- Based on the above traffic numbers, Mountain Biking tourists on weekends only inject **\$2,729,107** (very conservative estimate) to **\$4,093,661** based on a 26 weekend season. If we project to include weekdays, economic injection is estimated to be over **\$8.0 million**. This is only direct spending. As a comparison, the Grand Fondo reported \$0.1 million in direct

spending from training rides. Squamish Valley Music Festival Economic impact study reported \$6.3 million in direct spending.

- For overnight visiting riders, the bulk of the spending is in accommodation (37%), restaurants (21%), groceries (14%), bike shops (14%).



Other Facts:

- On a scale of 1-10, **92%** of riders rated Squamish trails at 8 or higher.
- **48%** of visiting riders reported riding 5 or more times in Squamish annually.
- Suggested improvements from visitors:
 - **14%** mentioned better signage and maps, particularly on trails
 - **27%** indicated trails and maintenance could be improved, including increased youth and beginner trails
- **43%** of visitors were aware of the trail pass program. **13%** actually bought one.
- Visitor Distribution:

○ Lower Mainland	55%
○ Whistler	1%
○ Other BC	18%
○ Other Canada	4%
○ US – Pacific North West	9%
○ Other US	3%
○ Other	10%

Economic benefits that this study did not quantify:

- Riders training and competing in 5 major MTB races in Squamish would add significant numbers to this economic benefit projection.
- Our MTB trails are an asset that draw people to consider relocating here. The Crumpit Woods development uses this in the marketing of their properties. They use this headline on their website “ Access to world class trails and recreation right from your backyard” and reference the TOM in the very first sentence on their website: “*Crumpit Woods is centrally located on The Plateau, adjacent to the trails of the legendary Test of Metal mountain bike race in Squamish, BC.*”
- We counted 110 local riders daily on our three trail counters. Conservatively, every week, we project there are 1046 locals riding every week. This drives the local retail bike industry. And everyone who bikes needs the healthcare industry at some point.
- Trail running races like the Squamish 50 are bringing visitors to town. Last year, Squamish 50 brought 500 people to Squamish for racing and training.
- Our MTB trails generate a significant PR benefit in the form of countless youtube and pinkbike videos profiling Squamish riders and trails
 - This video had generated 157,000 views since being published October 2013.
<http://www.pinkbike.com/news/whatweredyoudoingat10-artbarn-video-2013.html>
 - This video has generated 140,000 views since July 2011.
<http://www.pinkbike.com/video/206139/>
 - <http://www.pinkbike.com/news/Fresh-From-the-Barn-Kevin-Landry-in-Squamish-video-2013.html> has over 41,000 views
 - <http://www.pinkbike.com/video/323898/> featuring the new St’halhem Sintl climbing trail has over 50,000 views. Since July 2013.

Appendix

Extrapolated findings

Results from the survey have been extrapolated to estimate figures to cover the entire riders sample gathered from the 3 trail counters. A series of calculations have been carefully made to expand the data out to estimate the impacts across all regular and long weekends of the entire riding season.

LONG WEEKEND:

long weekend	Rider Count	Total Spend Reported	per person/trip	Rider count	Extrapolated Rider Total Spend
Overnight	137	\$ 29,461	\$ 215	411	\$ 88,383
Day trip	200	\$ 7,379	\$ 37	600	\$ 22,137
Total	337	\$ 36,840		1011	\$ 110,520
				if the 3 trails counted represented 75% of visiting riders	\$ 165,780
				if the 3 trails counted represented 50% of visiting riders	\$ 221,040

REGULAR WEEKEND:

regular weekend	Rider Count	Total Spend	per person/trip	Rider count	Extrapolated Rider Total Spend
Overnight	90	\$ 19,444	\$ 215	271	\$ 58,333
Day trip	132	\$ 4,870	\$ 37	396	\$ 14,610
Total	222	\$ 24,314		667	\$ 72,943
				if the 3 trails counted represented 75% of visiting riders	\$ 97,258
				if the 3 trails counted represented 50% of visiting riders	\$ 145,886

TOTAL ROLL UP FOR 26 WEEKENDS OF RIDING SEASON:

26 weekends of riding season	Long Weekend Total spend	Regular Weekend Total spend	Rider count	Extrapolated Rider Total Spend
Overnight	\$ 353,532	\$1,283,321	7612	\$ 1,636,853
Day trip	\$ 88,548	\$ 321,429	11112	\$ 409,977
Total	\$ 442,080	\$1,604,750	18724	\$ 2,046,830
75%	\$ 589,440	\$2,139,667	24965	\$ 2,729,107
50%	\$ 884,160	\$3,209,501	37447	\$ 4,093,661

Methodology/Assumptions

Some layers of extrapolation are required to allow reasonably accurate data that takes us from our sample size, to numbers that represent something very close to the overall number of riders visiting Squamish.

- 1) Some extrapolation has been calculated to obtain reasonable estimates that would roll up and incorporate approximate totals from all riders counted on the 3 trail counters during the Labour Day Weekend but not surveyed (the remaining 66%)
- 2) Based on comparisons to similar surveys conducted by the Mountain Bike Tourism Association in previous years, further estimations can be made on how many riders may be using all of the remaining trails in the Squamish network, but were not counted or surveyed and thus could be concluded to be injecting further spending into the local economy;
 - a) If the total figure extrapolated conservatively represented 75% of total riders on all trails in the network, across the weekend.
 - b) If the total figure extrapolated represented 50% of total riders on all trails in the network, across the weekend.
- 3) Calculations to approximate spending on regular weekends by visiting riders. The above extrapolations have been shrunk to accommodate only 2 days, and a reduction in total nights stay.