



District of Maple Ridge Non-Hotel Accommodation Study

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Mr. Darrell Denton
Business Retention & Expansion Officer
District of Maple Ridge
11995 Haney Place
Maple Ridge, BC V2X 5V5

Grant Thornton LLP
Suite 1600, Grant Thornton Place
333 Seymour Street
Vancouver, BC
V6B 0A4
T (604) 687-2711
F (604) 685-6569
www.GrantThornton.ca

Dear Darrell

Re: Executive Summary for the Non-Hotel Accommodation Study

As requested, please find attached the Table of Contents and Executive Summary for the District of Maple Ridge Non-Hotel Accommodation Study. The full study was provided under separate cover.

We thank you for your co-operation and assistance during the course of this assignment and appreciate the opportunity of working with you. If we may be of assistance in the interpretation or application of our findings, or in the furtherance of this project, please contact me at 604 443-2149 or Jennifer Nichol at 604 443-2146.

Yours sincerely,

A handwritten signature in black ink that reads "Grant Thornton LLP".

Doug Bastin, CMC
Partner, Grant Thornton Consulting

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Executive summary

Introduction

The District of Maple Ridge engaged Grant Thornton LLP to conduct a *Non-Hotel Accommodation Study*. The study commenced in May 2011 and was completed in September 2011. The intent of the project was to provide recommendations for the development of a full range of short-term stay non-hotel accommodation options. This Executive Summary presents highlights from the full report.

Objectives

The overall objectives related to potential accommodation developments in Maple Ridge are as follows:

- Maple Ridge, and key stakeholders, are in the process of further developing and marketing their community as a tourism destination. A critical gap in the current make-up of the destination is overnight accommodation, including non-hotel accommodation. As a result, the over-riding objective of this process is to attract investment in new accommodation for which there is existing and potential market demand.
- Another key objective relates to the need to develop new accommodation that is of a high standard and that meets the needs of target markets. This is critical, given that there are many competitive destinations/products in and around the Lower Mainland.
- Related to the above-noted objective is the need to encourage the development of unique products and accommodation. This will help Maple Ridge set itself apart from competitive destinations.
- The final objective relates to the importance of encouraging the development of overnight accommodation that complements the natural setting, the cultural setting, the community character and the existing tourism products, attractions and assets in the area.

Existing overnight accommodation in Maple Ridge

Key conclusions regarding the existing supply of accommodation in Maple Ridge are as follows:

- The accommodation sector in Maple Ridge has grown slowly, and is still not developed enough at this time to support the growth envisioned for Maple Ridge, as a tourism destination.
- While this study is not intended to address hotel accommodation, to provide a complete picture, it should be noted that there are only three hotel properties in Maple Ridge at this time.

- In terms of units or sites, the current inventory of overall accommodation in Maple Ridge is dominated by camp sites, the majority of which are located within three campgrounds in Golden Ears Provincial Park.
- The current inventory and quality of full-service RV facilities is limited.
- The non-hotel fixed roof accommodation is limited to one small budget motel, one lodge/guest ranch, one lodge/retreat centre and five B&B properties.
- Some visitors who are participating in tourism activities in the Maple Ridge area are choosing to stay in neighbouring communities, such as Pitt Meadows, Mission and Harrison Hot Springs/Agassiz, because Maple Ridge does not offer the type of accommodation they are seeking.
- Given the current non-hotel accommodation base, Maple Ridge may not be well-positioned to attract and service certain types of visitors.

Information gleaned through the interviewing process suggests that there is existing and potential demand for new non-hotel accommodation in the area, which would supplement the limited supply of existing accommodation documented in this section, and provide support for increased overnight tourism growth in Maple Ridge.

Potential accommodation to suit key markets in Maple Ridge

Research related to existing and potential demand generators for accommodation and Maple Ridge indicates that there is demand potential for a range of accommodation types, as highlighted on the next page.

The following table shows the most suitable types of accommodation for the target market segments. “H” indicates high suitability, while “M” indicates moderate suitability. Given personal preferences and variations within market segments, there will be “deviations” from the ratings provided below. For example, there may be some flight school participants who choose to stay at an adventure/eco-lodge.

Type of Accommodation Most Suited to Market Segments	Market Segments									
	Justice Institute Course Participants	International Students	International Students' Parents	RV Market	Flight School Participants	Regional Markets				
						Family Market	“Get-Away” Market	Cycling Events Market	Other Events/Attractions Market	Equestrian Market
Student Residence	H	H			M					
Destination RV Park				H	M	M		M		
Destination RV Park with campsites, cabins and yurts				H	H	H	H	H	H	
Adventure/Eco-Lodge with Spa			H		H	H	H	M-H	H	H
B&Bs, Guest Houses, Agri-tourism properties	H		H		M	M	H	M-H	H	M-H
Hotels*	H		H					H	M	

* The proposed development of hotel accommodation is not within the scope of this study. However, hotels are noted here to relay the point that some of these target markets may also be interested in utilizing hotels. In other words, although the proposed non-hotel accommodation may be preferred by some travellers within a specific market segment, other travellers within the same market segment may choose to stay in hotel accommodation.

Conclusions and recommendations

Short-term priority: Destination RV park, cabins and yurts

The development concept that would best meet the objectives noted earlier in the short-term is the destination RV park, with tenting sites, cabins and yurts. This concept presents the best opportunity to attract investment. It also presents a good opportunity to absorb excess demand for RV camping and tent camping in peak seasons in the Lower Mainland, while generating increased direct tourism spending in the Maple Ridge area.

Short to mid - term priorities: B&Bs/guest houses/inns and agri-tourism accommodation

Given that, initially, this concept does not require a large capital investment and land allocation, the development of a program to encourage higher standards with regard to the development and operation of B&Bs, guest houses/inns and agri-tourism accommodation is viewed as a mid-term priority.

Longer- term priorities: Student residence and eco/adventure lodge

These development concepts will require considerable effort to coordinate and implement. While the two concepts can be further explored in the short-term, the recommendation is to focus more effort on these concepts after the destination RV park, cabins and yurt development is in full operation.