

Estimated revenue, employment and traffic of NIMMSA member businesses based on a survey conducted in 2012.



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INTRODUCTION

The North Island Marine Mammal Stewardship Association (NIMMSA) is a society whose members include the owners and staff of marine based adventure tourism companies that operate in the waters off northeastern Vancouver Island. The purpose of NIMMSA as described in the association's constitution is to represent the north island marine based tourism industry through business and stewardship actions aimed at benefiting the local marine environment, species within it and the industry. NIMMSA was incorporated in 2007 and is committed to the sustainability of a positive balance between industry activities and the health of the local marine eco-system.

NIMMSA currently represents the shared vision of over twenty companies that all have a vested commercial interest in the viewing of healthy marine mammal populations. The health of these populations and their environment directly affects the viability of NIMMSA member businesses. Because of this, NIMMSA has led and supported various initiatives aimed at the protection of local marine mammal populations and their habitat (www.nimmsa.org/initiatives).

As an association representing an industry, NIMMSA provides unique strength to initiatives that are conducted on behalf of the environment. To provide perspective to this strength and more accurately appreciate the economic value of the industry NIMMSA represents, members were surveyed in 2012. Of the 21 active member companies in 2012, ten responded to the survey. Survey data for the remaining 11 companies was inferred based on known company age, type, size, service price and capacity. Results from this survey are the focus of this report.

RESULTS

In 2012, NIMMSA membership was comprised of 21 businesses. These companies fell into 5 categories: whale watching, lodges and resorts, adventure cruising, adventure kayaking and private charters. Whale watching comprises member companies that provide daily whale watching tours. Members that are lodges and resorts also provide daily marine wildlife tours for their guests. Adventure cruising companies offer multi-day trips aboard passenger vessels. Adventure kayaking companies offer multi-day camp based kayaking tours. Some companies that run private charters also provide marine taxi services. Most companies, however, specialize in one type of operation. The number of NIMMSA members in each category is shown in Figure 1. Regardless of type, all companies consider marine mammal viewing to be an important part of their business.

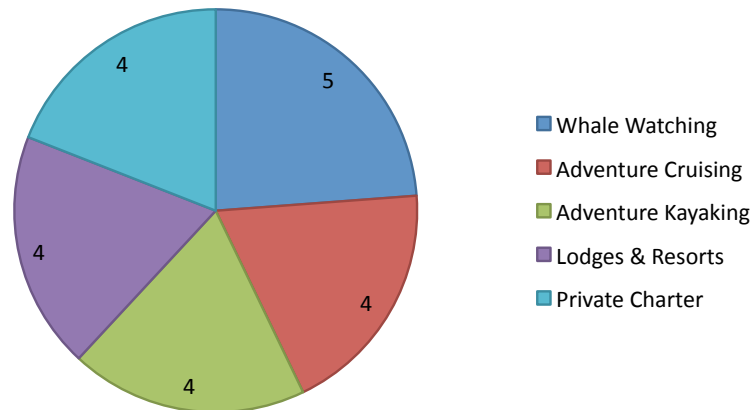


Figure 1. The number of NIMMSA members representing different business types and proportion of each that make up the overall member body.

As of 2012, the average number of years that NIMMSA member companies have been in business is 15 (range: 1-33). These companies provide a total of 54 year-round full time jobs and an average of 184 seasonally based full time jobs (range 150-200). A further 20 seasonally based part time jobs are provided by these companies. The number of both seasonal and year-round full time positions that each type of NIMMSA member business provides is shown in Figure 2.

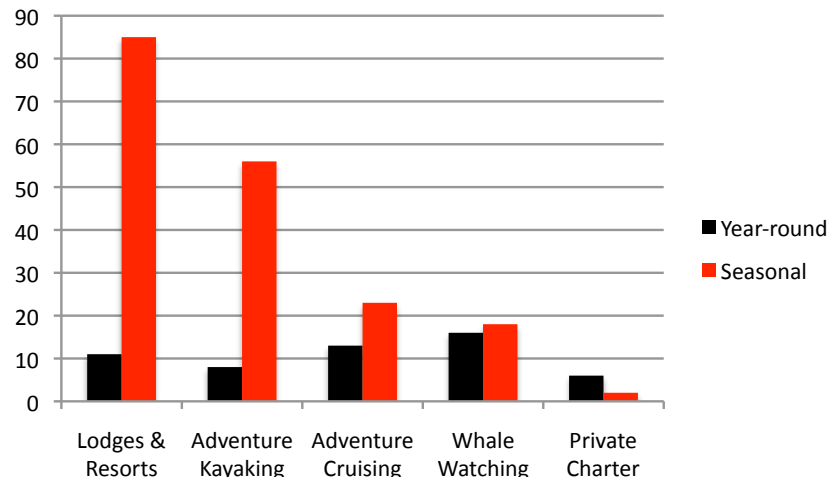


Figure 2. The number of year-round and seasonal full time jobs provided by NIMMSA members by business type.

NIMMSA member companies accommodate a combined total of between 25,000 and 40,000 guests per annum. The range in total guest traffic each year for each type of NIMMSA member business is provided in Figure 3. The combined annual revenue of NIMMSA members is between 17 and 25 million dollars. The range of annual revenue generated by each type of NIMMSA member business is provided in Figure 4.

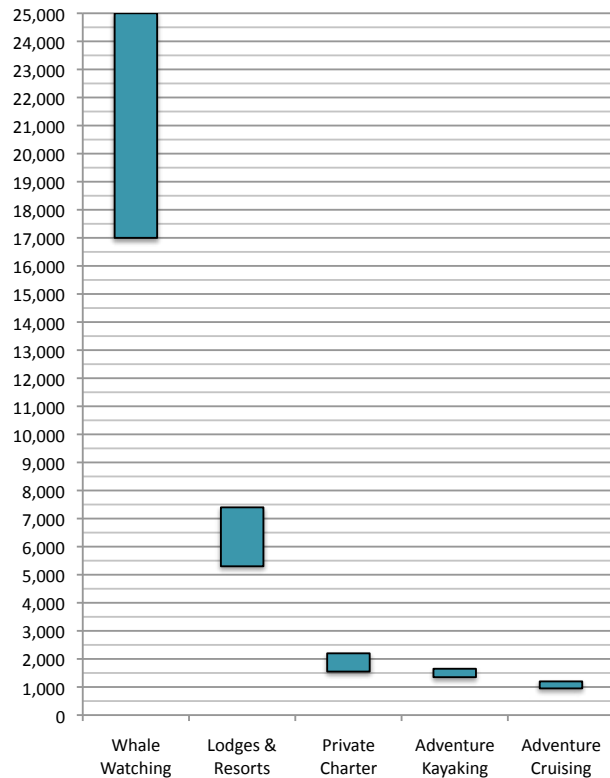


Figure 3. The range in number of guests accommodated by each type of NIMMSA member business per annum.

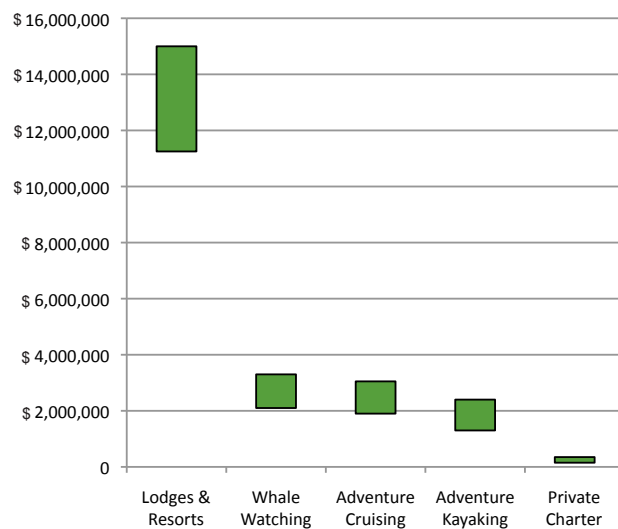


Figure 4. The range of annual revenue generated by each type of NIMMSA member business per annum.

DISCUSSION

Many NIMMSA members are pioneers of the adventure tourism industry in British Columbia. The wildlife and activities that NIMMSA member businesses provide access to are often what attract tourists to British Columbia in the first place. Repeatedly, these attractions are the peak or highlight of many tourists' vacations. The adventure tourism industry in British Columbia, although constantly fluctuating with world markets, has grown since its inception in the 1970s. One estimate suggests that the marine mammal viewing sector of the British Columbia tourism industry in particular, has grown at a rate of 4.2% per annum¹.

A common feature of NIMMSA member companies is that all commercially benefit from viewing healthy marine mammal populations. As shown in Figure 3, companies that specialize in whale watching accommodate the most tourists of the five types of NIMMSA members. The cost of this activity, however, likely represents a small fraction of any tourist's total vacation expenditures. When the revenue of whale watching for example is compared to that of lodges and resorts (Figure 4) it is clear that the tourists that come to see the wildlife in British Columbia also spend significant dollars on, among other things, dining and accommodation. Bearing in mind that not all companies involved in marine mammal viewing off northern Vancouver Island are NIMMSA members and that over 70% of the commercial marine mammal viewing activity within British Columbia does not occur in the northern Vancouver Island area¹, the ripple effect created by this industry stimulates a significant portion of the provincial economy.

Like the marine mammal viewing sector of the tourism industry, many populations of marine mammal in British Columbia have also grown over the last few decades²⁻⁶. Healthy marine mammal populations and a subsequent healthy tourism industry are, however, vulnerable to serious threats. The most prominent threat to the tourism industry and to marine mammals in British Columbia is that of an oil spill. Oil spilled in the marine environment has been known to threaten and/or kill many species of marine mammals⁷⁻⁹, including killer whales^{10,11}, which are the main attraction for most wildlife enthusiasts visiting British Columbia. Oil spilled in the marine environment has also been known to destroy or severely affect the tourism industry in some locations¹²⁻¹⁴. This is because tourism is often centered around marine attractions and oil in the ocean is nearly impossible to contain or clean. It consequently spreads across vast areas where it pollutes and has the potential to terminally affect numerous organisms. Because the consequences of an oil spill would thus threaten both the environment and the economy of coastal British Columbia, NIMMSA members along with the majority of taxpayers in British Columbia, oppose the Northern Gateway project proposal for an oil pipeline and associated supertanker traffic off the central and north coast of British Columbia¹⁵.

It is intended that the results and discussion in this report will provide a greater understanding of the economic and environmental values of the North Island Marine Mammal Stewardship Association, and furthermore, that these findings can be used to strengthen the opposition to the proposed Northern Gateway project.

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