

TUMBLER RIDGE SUSTAINABILITY PLAN

STRATEGIES FOR RESILIENCE

COMMUNITY PROFILE



ACKNOWLEDGEMENTS

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Most of all, we would like to acknowledge and thank the people of Tumbler Ridge who took the time to talk with us about their vision for the future. Your commitment to the community is a significant asset for the future of Tumbler Ridge.

The CDI is proud to have had a long history of involvement in Tumbler Ridge and wish you every success for the future.

Marleen Morris, Clare Mochrie, Greg Halseth, and Phil Mullins
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ACCESSING THIS REPORT

This project report may be accessed through the Community Development Institute's website at: <http://unbc.ca/community-development-institute/research-projects>. The project report is also available at the Tumbler Ridge Public Library.

Project Reports

1. **Tumbler Ridge Sustainability Plan: Strategies for Resilience:** Executive Summary
2. **Tumbler Ridge Sustainability Plan: Strategies for Resilience:** Community Profile
3. **Tumbler Ridge Sustainability Plan: Strategies for Resilience:** A Framework for Action

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WHO WE ARE AND WHERE WE STAND

Since its establishment in 1984, Tumbler Ridge has evolved from a single resource-based economy to an increasingly adaptive and diverse community. Tumbler Ridge began as Canada's newest "instant town", built to service the nearby coal mines. It boasted new infrastructure and modern community design, a young energetic population, plentiful jobs, and expansive community programs and services.

When the town's main employer closed in the year 2000, change came quickly. Many residents moved away from the community, leaving an over-supply of housing and reducing demand for all public and private services. However, a core group of dedicated residents and community leaders kept the spirit of the community alive.

Eventually, the low cost of housing attracted an older population to the community and new large employers surfaced in the region. Nonetheless, this major economic downturn emphasized the need to establish a broader and more diversified economic base; efforts focused on pursuing opportunities to diversify the industries and businesses that support the Tumbler Ridge economy today.

The nature of its establishment and the fact that Tumbler Ridge is still a relatively new and small-sized community means it continues to be vulnerable to fluctuations in the price of coal, which influences the operational decisions of the community's largest employers. The most recent downturn in coal prices in early 2014 reinforces the need to advance a focus on economic diversification and firmly establish Tumbler Ridge as a modern and self-reliant community in a beautiful setting. The Tumbler Ridge Sustainability Plan reflects a proactive and determined resolve to ensure that the community continues on the path to achieving this vision. *(Please see the accompanying document: A Framework for Action for the list of strategies and tactics).*

The pace and recentness of this latest shift in the local economy also means that much of the recorded data on the community is outdated. Notwithstanding this reality, the data on Tumbler Ridge – and the surrounding region – still provides useful insights on the residents and local economy, as well as on the opportunities and challenges for the community moving forward.

This Community Profile provides a snapshot of that data, as a baseline and reference point for future planning and action.



Sunset Heaven, by Leesa Barbon

POPULATION

As of 2011, 2,710 people lived in Tumbler Ridge. This represents a 10% increase in the population since 2006 – well above the provincial average of 7% – and a notable 46% increase since the mid 2000s when the district began to see a revival in its coal industry.

Between 2006 and 2011, while Tumbler Ridge was experiencing this pace of rapid growth, most areas of the region were contracting in size. However, since 2011, the opposite trend has emerged. As the population in Tumbler Ridge leveled off between 2011-2013, the Peace River region charted record growth. Between 2011 and 2013, the Peace was the fastest growing region in the province, growing by 4.4%, as compared to 1.8% in BC overall.

This regional population is particularly critical for the economy of Tumbler Ridge as it represents a pool from which the community can draw workers, vendors, and a clientele for any new business ventures.

An important component of the populations of both Tumbler Ridge and the Peace River region, not reflected in the Census statistics, is comprised of temporary and non-resident workers. With the increase in fly-in/fly-out workforces and the majority of mines around Tumbler Ridge operating on a seven day shift rotation, there are growing numbers of individuals who reside locally, but maintain primary residences elsewhere. While difficult to quantify, these workers represent an important target market for local businesses. At the same time, because they are not included in the official population count, they are not accounted for when allocating funds and services to the District.

Table 1: Tumbler Ridge Population (2001-2013)

Source: BC Stats. (2014) *Demographic Analysis Section*.

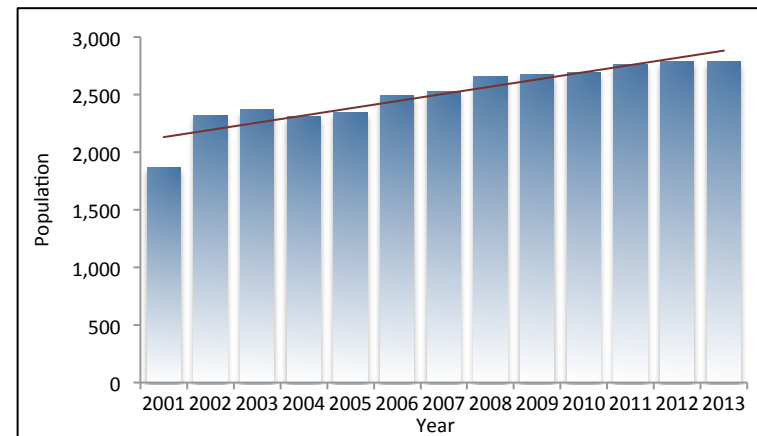
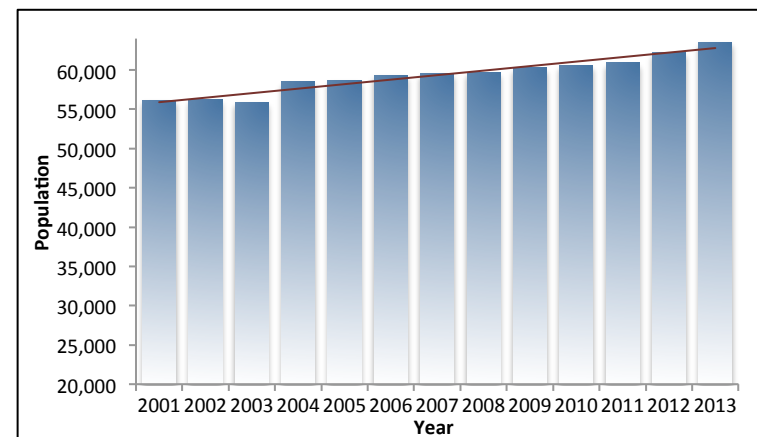


Table 2: Peace River Region Population (2001-2013)

Source: BC Stats. (2014) *Demographic Analysis Section*



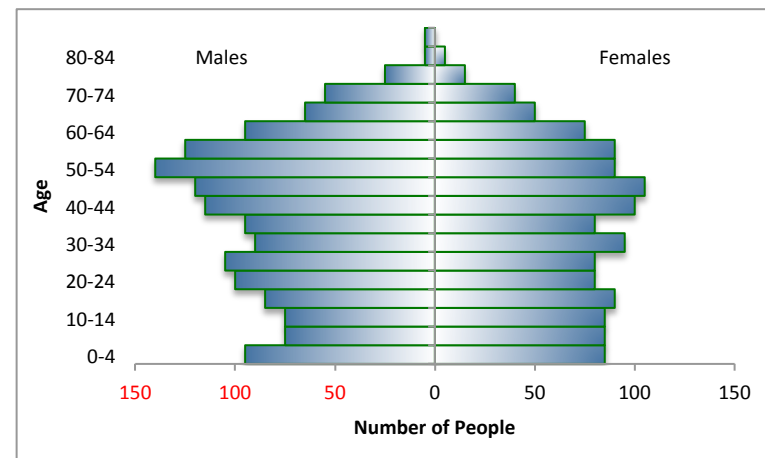
AGE PROFILE

As of 2011, the median age in Tumbler Ridge was 39.0, which was slightly lower than the provincial median of 41.9. Relative to the province overall, Tumbler Ridge was home to a smaller proportion of seniors and a larger proportion of children under the age of 15. 81.9% of the population was 15 years or older, as compared to 84.6% in the province overall. Particularly relevant from an economic perspective, the large majority of the population falls into the 40 to 59 age cohort, which are the prime earning years.

The population in Tumbler Ridge is similar to that of the Peace River region overall, which is younger than average with a median age of 34.0. The majority of Peace River region residents also fall within the 40 to 59 age bracket.

Table 3: Tumbler Ridge Age Profile (2011)

Source: Statistics Canada. *2011 Census of Canada: Profile for Tumbler Ridge*



I N C O M E

Household, personal, and employment incomes in Tumbler Ridge are all significantly higher than the BC average. They are also greater than those found in neighbouring communities such as Dawson Creek and Chetwynd. In 2010, the median income of individuals in Tumbler Ridge was \$40,586, 42% above that in BC. Median employment income was \$60,392.

Earnings in Tumbler Ridge and in the region are on the increase. Between 2006 and 2011, median household incomes rose by 14.5% in Tumbler Ridge and 24.4% in the region. As of 2011, Peace River Regional District recorded the second highest median incomes in the province.

P R E V A L E N C E O F D E B T & L O W I N C O M E

While it is not uncommon for industry-dependent communities to be polarized in terms of incomes so as to have high median incomes as well as a high proportion of low-income residents, this is not the case in Tumbler Ridge. As of 2010, only 9.1% of the Tumbler Ridge population qualified as being low income (after-tax). In contrast, the prevalence of low income was 16.4% in BC, 13.4% in Dawson Creek and 11.8% in the Peace River Regional District.

However, while statistics are not available for Tumbler Ridge, a recurrent theme through the interviews was a concern for the high levels of debt in the community. According to these sources within the community, many individuals and households are carrying excessively high levels of debt, making them increasingly vulnerable to shifts in the broader economy. High debts were seen to have emerged in connection with the high income levels in town, and more specifically the availability of low skilled, high paying jobs. A lack of financial literacy and skills in personal financial planning were also said to have contribute to the issue.

EDUCATIONAL ATTAINMENT

Tumbler Ridge has a high proportion of technically skilled residents. As of 2011, a quarter of its population possessed some form of non-university certificate/diploma, as compared to 20% in BC overall – and 16% held registered apprenticeships relative to 11% in BC. In contrast, the proportion with university certificates, degrees, or diplomas (bachelor level and above) is well below average: 7% as compared to 27% in BC.

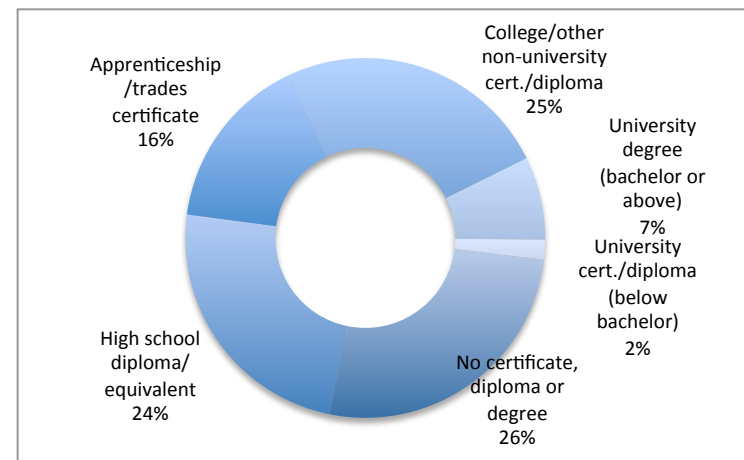
In addition, a quarter of the 2011 population (26%) had no educational certificate, diploma, or degree. This is considerably higher than the provincial average of 10%, as well as the proportion in similar districts (Chetwynd: 15%; Dawson Creek: 16%).

The proportion of residents with university degrees is on the rise – and the number of non-educated residents did decrease between 2006 and 2011. However, the sizable number of community members with a low level of education should be noted as an issue of concern.

With a strong market for coal, individuals without a high school diploma are able to find employment at the mines. In 2006, more than one-fifth of the workforce (22%) had not attained a high school certificate and 25% had no education beyond their high school diploma. Unfortunately, these individuals are extremely exposed when the economy slows down. Those with the least educational credentials are typically the first to be laid off and also those to have the fewest options in a time of economic transition.

Table 4: Educational Attainment (2011)

Source: Statistics Canada. 2011 Census of Canada: Profile for Tumbler Ridge



GRADUATION RATES & EARLY CHILDHOOD DEVELOPMENT

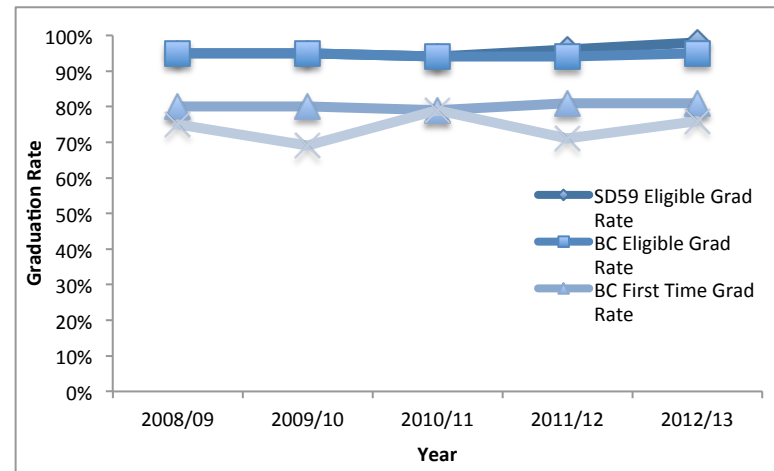
Attaining a basic level of education is essential to mitigating one's vulnerability to boom and bust cycles of the economy. Keeping youth in school is a challenge in many resource communities where industry offers high paying job opportunities to those with minimal skills. In boom times, Tumbler Ridge has indeed seen some of its youth leave school prematurely to take jobs at the mines. Efforts in recent years, however, have been very successful at curbing this trend.

Graduation rates from Tumbler Ridge Secondary School are very high. As of 2012/13, 98% of those eligible to graduate did so, compared to 95% in BC overall. This included 97% of eligible Aboriginal students, compared to 91% in BC.

Six year completion rates are, however, below average. In many small towns, it is a constant challenge for schools to offer all of the courses – on an annual basis – that students require in order to graduate. As a result, it is often difficult for youth to graduate within the standard six years. Tumbler Ridge faces this challenge. It is, therefore, not surprising that the six year completion rate in SD59 was below that in BC overall: 73% in 2012/13 compared to 84% in BC.

Table 5: Graduation Rates, SD59, and BC (2008/09-2012/13)

Source: BC Ministry of Education. 2012/13 District Reports for SD59



Tumbler Ridge scores well on early child development. The most recent wave of early development testing for the Peace River South local health area (collected between 2011-13) found 32% of kindergarten children vulnerable on one or more scales of the Early Development Instrument (EDI). This rating was lower than the Northern Health Region average (36%) and just slightly below that for BC (33%).

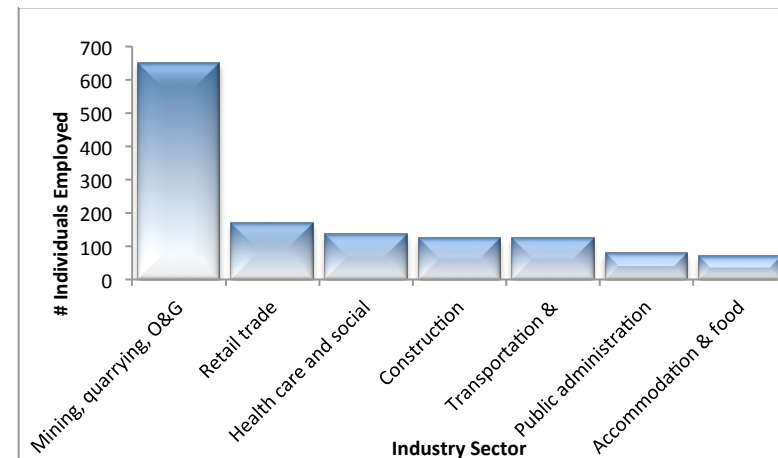
The Early Development Instrument (EDI) is a tool to assess childhood development, which measures kindergarten children in five core areas known to be good predictors of adult health, education, and social outcomes. The tool highlights the percentage of children who are considered vulnerable in one or more of these core areas. Vulnerable children are defined as those who, without additional support and care, may experience future challenges in school and society.

EMPLOYMENT & LABOUR FORCE

As of 2011, four out of every ten jobs in Tumbler Ridge were supplied by the natural resource sector (mining, oil and gas). Retail trade was the second largest industry, accounting for 10% of (or 170) jobs, followed by health care and social assistance, transportation, and construction; each of which employed 8% of the workforce, or 125 workers.

Table 6: Labour Force by Industry (2011)

Source: Statistics Canada. 2011 National Household Survey: Profile for Tumbler Ridge

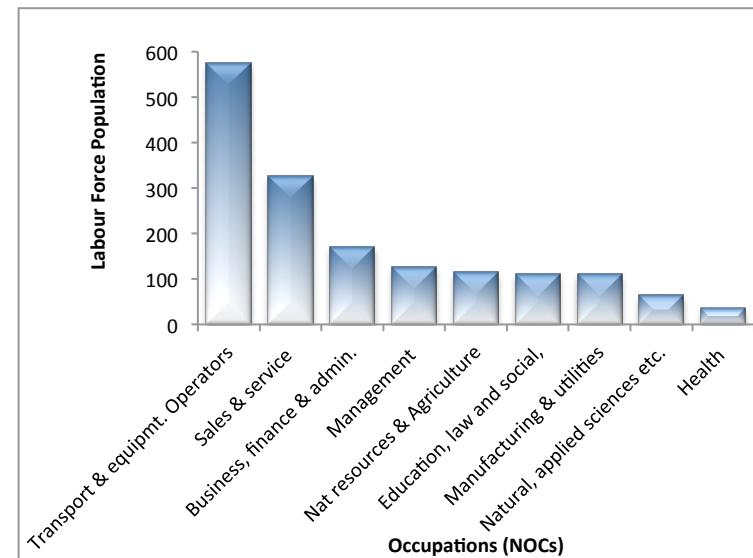


As of 2011, over one-third of the labour force (35%, representing 575 individuals) in Tumbler Ridge registered occupations in the field of trades, transport, and equipment operators. Sales and service was the second most common occupation (20%), followed by business, finance, and administration (10%).

It is worth noting that no residents in 2011 indicated having an occupation in the arts, culture, recreation, and sport industries. While this is not an indication of the level of activity in these fields, it is relevant to note that no one identified these as their primary occupation.

Table 7: Labour Force by Occupation (2011)

Source: Statistics Canada. 2011 National Household Survey: Profile for Tumbler Ridge



BUSINESS & INDUSTRY PROFILE

While Statistics Canada data for Tumbler Ridge are not available, as of 2011, there were a total of 6,220 business establishments registered in the Peace River Regional District, including 3,411 with employees and 2,809 without. Notwithstanding the surge in the regional economy over the past five years, the number of both types of businesses dropped between 2008 and 2011: 14% in the case of businesses with employees and 7% for businesses without employees.

The vast majority of businesses (89.5%) in the region were small businesses, with less than 20 employees. 7% of businesses had between 20 and 49 employees and 3% had between 50 and 199 employees. As of 2011, only 16 businesses in the region had 200 or more employees. The number of businesses in this category has dropped by 24% since 2008.

Table 8: Number of Businesses, Peace River RD (2011)

Source: Statistics Canada, Business Register. Prepared by BC Stats.

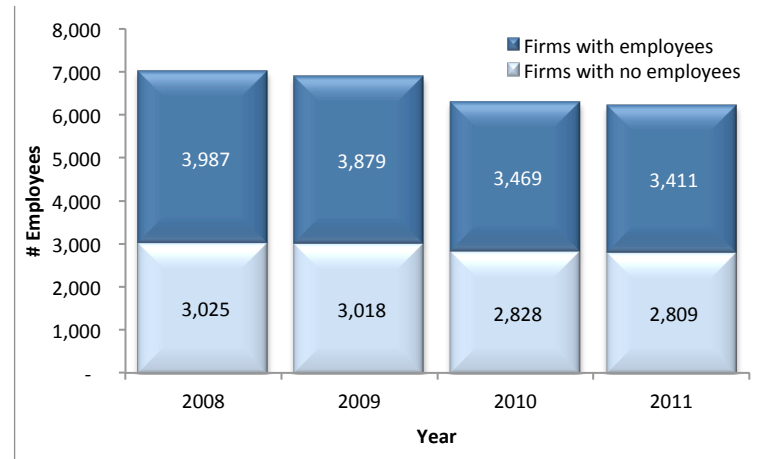
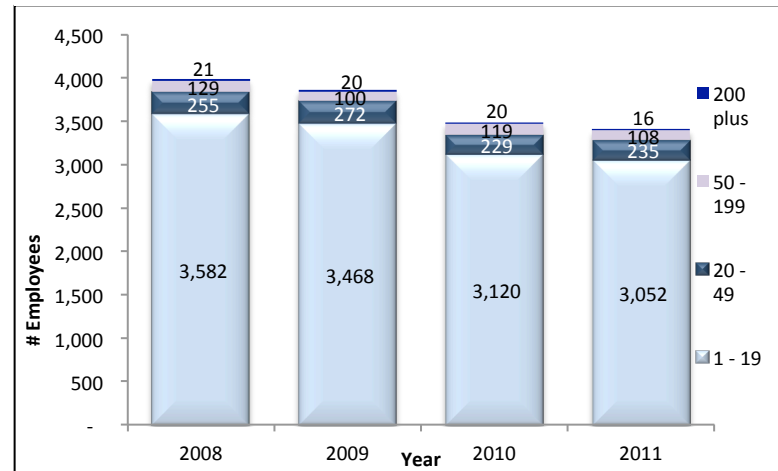


Table 9: Number and Size of Businesses, Peace River RD (2011)

Source: Statistics Canada, Business Register. Prepared by BC Stats. (2014)



The rate of business incorporations is seen as an indicator of entrepreneurial confidence in a region's economy. Given the economic surge in the Northeast, it is therefore not surprising that the Peace River region has seen a marked increase in its rate of business formations in recent years, with the number of incorporations rising by 61% between 2009 and 2013, as compared to 22% in the province overall.

The number of business formations peaked in 2011 at 505 and has dipped slightly since then. Tumbler Ridge, however, has contributed very little to these numbers. Between 2009 and 2013, a total of 16 businesses were incorporated in Tumbler Ridge.

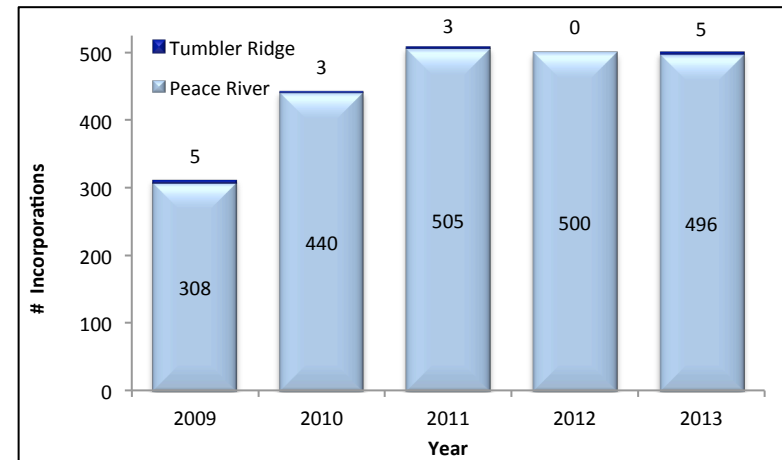
There are, however, a significant number of major projects in and around Tumbler Ridge. As of September 2014, the Major Projects Inventory, maintained by the Province, listed four major projects (i.e. projects with capital costs over \$15 million) as being in Tumbler Ridge.


There are an additional 18 major projects listed as being in the Peace River Regional District.

Looking at the infrastructure and supports available to leverage development from these various projects, Tumbler Ridge is hindered by the fact that it is without a redundant power source. The town is serviced by three freight forwarders, but only a single courier service. There is only one financial services institution located in Tumbler Ridge.

Table 10: Business Formations, Tumbler Ridge and Peace River (2009-2013)

Source: Statistics Canada. Business Register. Prepared by BC Stats. (2014)





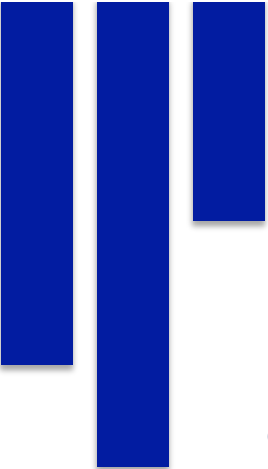
While there is an airstrip, the runway is in need of repair and there are no regular carriers. There is also no passenger bus or rail service to Tumbler Ridge. The only transportation in and out of the community is by private vehicle. This poses a challenge not only for the import and export of goods and services, but also for tourism.

While the area around Tumbler Ridge offers a host of year round outdoor recreation opportunities, there are very few commercial operations in place to support and enable these opportunities, particularly in relation to what is offered by towns with developed tourism industries, such as Valemount and Revelstoke.

The Appendix of this report contains a comparison of sport and recreation/tourism commercial infrastructure in Tumbler Ridge, Mackenzie, Valemount, and Revelstoke. As shown, as of 2014, the only commercial sport and recreation services operating in Tumbler Ridge were in the areas of boat tours, helicopter tours, and hunting/guiding. In comparison, Valemount (population 1,020) had operators in ATV guiding, backcountry guiding, boat tours, cat-skiing operations, dogsledding tours, helicopter tours, heli-skiing operations, horseback guiding, hunting/guiding, mountaineering/hiking guiding, rafting/kayak tours, snowmobile guiding, and snowshoe guiding.

Businesses and services that are needed to support a tourism industry are also relatively undeveloped in Tumbler Ridge. There are a total of seven accommodation businesses in Tumbler Ridge: two hotels, one motel, one bed and breakfast, one RV park, and two campgrounds. In contrast, Valemount has a total of 45. Revelstoke, albeit with a larger population of 7,139, has 59 such establishments.

Apart from the difference in numbers, these other communities have a broader range of accommodation options, which signals potential opportunities for Tumbler Ridge. Valemount, for example, also only has two hotels, but it has eight motels/inns, ten bed and breakfasts, five cabins, and nine other roofed types of accommodations such as “guest houses”.



Relative to these other communities, there appear to be opportunities for more restaurants in Tumbler Ridge, should the community wish to support a greater base of tourists. While Tumbler Ridge has four eating establishments at present, Valemount has double this number and Revelstoke has four times as many.

There is a vacancy when it comes to private sector ancillary services relevant to an outdoor recreation/tourism industry to enable visitors to purchase, rent, or repair equipment and supplies in Tumbler Ridge. In addition, as mentioned previously in this report, there are also limited options for getting visitors, supplies, and services to and from the community.

APPENDIX

COMPARATIVE COMMERCIAL TOURISM INFRASTRUCTURE

Table 1: Commercial Sport and Recreation Services

	Tumbler Ridge 2,710	Mackenzie 3,507	Valemount 1,020	Revelstoke 7,139
Population (2011)				
ATV Guiding	No	No	Yes	No
Backcountry Guiding	No	No	Yes	Yes
Boat Tours	Yes	Yes	Yes	Yes
Cat-skiing Operations	No	No	Yes	Yes
Dogsledding Tours	No	No	Yes	Yes
Helicopter Tours	Yes	No	Yes	Yes
Heli-Skiing Operations	No	No	Yes	Yes
Horseback Guiding	No	No	Yes	No
Hunting Guiding	Yes	Yes	Yes	Yes
Mountain Bike Tours	No	No	No	Yes
Mountaineering/Hiking Guiding	No	Yes	Yes	Yes
Paragliding Operations	No	No	No	Yes
Rafting/Kayak Tours	No	Yes	Yes	Yes
Snowmobile Guiding	No	Yes	Yes	Yes
Snowshoe Guiding	No	No	Yes	Yes

Table 2: Support Services: Accommodations & Restaurants

	Tumbler Ridge	Mackenzie	Valemount	Revelstoke
Hotels	2	1	2	7
Motels and Inns	1	2	8	11
B&Bs	1	1	10	17
Hostel	0	0	0	2
Cabins	0	0	5	2
Other Roofed Accommodations (Guest Houses etc.)	0	0	9	10
RV Parks	1	1	3	2
Campgrounds	2	3	8	8
Total	7	8	45	59
Restaurants	4	9	8	16

Table 3: Private Sector Support Services

	Tumbler Ridge	Mackenzie	Valemount	Revelstoke
Adults Sporting Goods Equipment	No	No	Yes	Yes
Kids Sporting Goods Equipment	No	No	Yes	Yes
Mechanized Recreation Equipment Rental	No	No	Yes	Yes
Mechanized Recreation Equipment Purchase or Repair	No	No	Yes	Yes
Non-Mechanized Outdoor Equipment Rentals	No	No	Yes	Yes
Gas Station	Yes	Yes	Yes	Yes
Automobile Repair Services	Yes	Yes	Yes	Yes

Table 4: Transportation Services

	Tumbler Ridge	Mackenzie	Valemount	Revelstoke
Local Bus Transit	No	No	No	Yes
Inter-Community Bus Station	No	Yes	No	Yes
Charter Bus	No	Yes	Yes	Yes
Train - Passenger	No	No	Yes	No
Train - Freight	No	Yes	Yes	Yes
Airport	Yes	Yes	Yes	Yes
Helicopter Pad	Yes	Yes	Yes	Yes
Boat/Ferry Terminal	NA	NA	NA	Yes
Marina	No	No	Yes	Yes
Taxi	Yes	Yes	Yes	Yes

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The Community Development Institute at The University of Northern British Columbia

The Community Development Institute (CDI) at UNBC was established in 2004 with a broad mandate in the areas of community, regional, and economic development. Since its inception, the CDI has worked with communities across the northern and central regions of British Columbia to develop and implement strategies for economic diversification and community resilience.

Dedicated to understanding and realizing the potential of BC's non-metropolitan communities in a changing global economy, the CDI works to prepare students and practitioners for leadership roles in community and economic development and create a body of knowledge, information, and research that will enhance our understanding and our ability to anticipate, and develop strategies for, ongoing transformation. The CDI is committed to working with all communities – Aboriginal and non-Aboriginal – to help them further their community and regional development aspirations.

*Research having an impact,
People making a difference*

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