The Economic Impact of Snowmobiling in Ontario

An Assessment of the 2013-2014 Snowmobiling Season

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Prepared for:
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About the Authors

Harry Cummings and Associates (HCA) is a planning and evaluation firm based in Guelph, Ontario. Since its inception in 1997, HCA has conducted over 150 projects across Canada and internationally. HCA has experience working with government, private organizations and non-profit community agencies in the areas of research and analysis, strategic planning and program evaluations.

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HCA has enjoyed working on this study and we appreciate the opportunity to work with the OFSC and the snowmobile community. We look forward to future partnerships.

The Economic Impact of Snowmobiling in Ontario- Executive Summary

The Ontario Federation of Snowmobile Clubs (OFSC) retained Harry Cummings and Associates (HCA) to study the economic impact of snowmobiling during the 2013-2014 season, as an update to studies completed in 2005, 1997 and 1989. OFSC is a volunteer led, not-for-profit association, which through strong leadership, provides a wide range of quality programs and services to, and on behalf of, its member organizations. The OFSC's provincial network of organized snowmobile trails connects Ontario communities providing responsible riding experiences that are safe, enjoyable and environmentally sustainable.

The first study in 1989 found that OFSC members spent $241 million over the 1988-1989 season. A second study concluded the 1996-1997 season expenditures related to snowmobiling totaled $586 million. The most recent study investigated snowmobiler expenditures during the 2004-2005 season, which were estimated at $637,218,785.

Given the value of snowmobiling to the Ontario economy and the changes in economic, societal and environmental landscape since 2005, the OFSC initiated this economic impact assessment. HCA surveyed snowmobilers and completed interviews with OFSC volunteers to determine habits of snowmobilers as well as annual expenditures and expenditures related to snowmobiling trips across the province. Using this data, HCA was able to calculate the economic impact of snowmobiling using the Ontario Ministry of Tourism, Culture and Sport's Tourism Regional Economic Impact Model (TREIM). TREIM produces estimates of the direct, indirect and induced impacts of tourism-related activities on Gross Domestic Product (GDP), labour income and employment as well as estimates of the direct and total impacts of tourism-related activities on federal, provincial and municipal tax revenues.

Many snowmobilers reported that they were more active in snowmobiling during the 2013-2014 season compared to previous seasons. The 2013-2014 Ontario snowmobile season had $853,263,840 in expenditures by snowmobilers riding in the province. This contributed to an increase of $369.4 million in direct GDP and a total of $731.3 million in GDP including direct, indirect and induced GDP impacts. Direct employment from the season's snowmobile expenditures resulted in employment comprising 7,292 equivalent full-year jobs. Including indirect and induced employment, there were 11,307 jobs generated by the industry in 2013-14. In addition snowmobiling in Ontario supported $332.8 million in total taxes among the three levels of governments, with the federal government receiving $185.5 million, provincial government $145.0 million and municipal governments across the province receiving $2.3 million.

Referring to total economic activity generated by the snowmobile industry, we note that the $853 million in expenditures would generate $1.7 billion in economic activity in the province in 2013-14 using a multiplier of 2.0, as suggested by the Ministry of Tourism, Culture and Sport.

Ontario Federation of Snowmobile Clubs

The Ontario Federation of Snowmobile Clubs (OFSC) is a volunteer led, not-for-profit association, which through strong leadership, provides a wide range of quality programs and services to, and on behalf of, its member organizations. The provincial network of organized snowmobile trails connects Ontario communities providing responsible riding experiences that are safe, enjoyable and environmentally sustainable.

This organization is guided by the following mission statement:

> *"The Ontario Federation of Snowmobile Clubs is dedicated to providing strong leadership and support to member clubs and volunteers, to establishing and maintaining quality snowmobile trails which are used in a safe and environmentally responsible manner, and to furthering the enjoyment of organized snowmobiling."*

More than 200 community-based OFSC member snowmobile clubs are organised into 16 operational districts which together operate more than 30,000 km of signed and groomed trails for use by approximately 100,000 snowmobile trail permit holders and their families.

The OFSC's Board comprised of the Executive and District Governors meets throughout the year to set policy, undertake long term planning, and oversee the provincial operations and budget on behalf of the clubs. As the coordinating body for organized snowmobiling in Ontario, the OFSC provides advice and guidance to member clubs on a broad range of topics to ensure provincial objectives are met. The Federation is also responsible for activities that the clubs deem are best handled at the provincial level such as policy and procedures, trail planning, insurance, safety, environment, and the user pay system. Proceeds from the sale of the trail permits required to enter OFSC trails provide primary funding for both the trail operations of local snowmobile clubs and their provincial organization.

Studying the Economic Impact of Snowmobiling

Economic Impact of Snowmobiling in Ontario

Prior to the study of the 2013-2014 season there have been three studies completed regarding the economic impact of snowmobiling in Ontario.

The first was completed by a team led by Dr. Paul Eagles, during a period of significant growth in the popularity of snowmobiling. The study made an estimate on expenditures of snowmobilers using data collected from a survey sent to 1,000 OFSC permit holders at random. A total of 431 questionnaires were returned, for a response rate of 43%. This would include non-resident snowmobilers who purchased permits to travel on Ontario trails (Eagles, P. F. J., R. S. Sherback and L. N. Ordubegian, 1990).

The study found that OFSC members spent $241 million over the 1988-1989 season. The majority of the survey respondents were male and married. At the time, over half of the survey respondents had been participating in snowmobiling for more than ten years and owned an average of 1.8 snowmobiles. The study measured the expenditures made on fixed and variable expenses they had or were planning on making in Ontario during the season. Fixed costs were defined as those which are generally incurred once over a season including: their snowmobile or snowmobiles, clothing and accessories, trailers, and insurance. Variable costs were defined as expenses incurred while on a snowmobile outing including: lodging, food, gas for the snowmobile and tow vehicle, as well as repairs. Just over $2 million was reported spent in Ontario by 431 survey respondents on fixed and variable items within the 1988-1989 season. The largest expense for snowmobilers was the purchase and up-keep of a snowmobile, while the largest variable expense was found to be fuel costs (Eagles, et al., 1990).

In 1998, OFSC with the support of the Northern Ontario Heritage Fund sponsored the preparation of a report entitled "Winter Gold: The Report on the Economic Sustainability and Development of Snowmobiling in Ontario". This study, like the previous, focused on the fixed and variable expenditures of snowmobilers in Ontario. A survey was randomly sent to OFSC permit holders from Ontario (n=3,000), the United States (n=500) and adjacent provinces (n=185). However, this study used TEAM- an economic impact model which has an input-output base and multiplier estimates (Ecologistics Limited, 1998).

The majority spending was on fixed expenditures, approximately $399 million, 70% of which was on snowmobiles. The spending on variable expenditures including, food and beverages, fuel and oil and repairs, as well as overnight expenditures was $186 million for a total fixed and variable expenditures of $585 million for the season. Approximately 25% of the variable expenditures were on fuel and oil for snowmobiles and another 25% spent on food and beverages while snowmobiling. It was estimated that the total economic activity generated by snowmobiling was $932.4 million in 2004-2005 in Ontario. A separate estimate of contribution to GPP was made showing snowmobiling contributed $322.5 million to the gross provincial product of Ontario. Further, this report reviewed a number of issues facing the snowmobile industry in the Province

of Ontario. This study announced that organized snowmobiling had evolved from a localized recreational pursuit to an important industry in Ontario (Ecologistics Limited, 1998).

Using the TEAM model, Paula Neice and Associates found that the 2004-2005 season in Ontario generated over one billion dollars in economic activity in the province, with direct expenditures totalling $637 million. The survey of permit holders had a 65% response rate. The survey data from permit holders was combined with other information including insurance records and Ministry of Transportation records to project the impact of all snowmobiling on the Ontario economy. The study found that the average household had 1 or 2 snowmobiles with OFSC permits, more than half of the permit holders live in a rural community, and 25% of the survey respondents have been involved in snowmobiling for more than 25 years (Paula Neice and Associates, 2005).

The TEAM model was used to make the following projections. In 2004-2005 the Province of Ontario generated $17 million from the sale of 103,867 full and short term snowmobile permits. In addition snowmobiling in Ontario supported $274.8 million in total taxes among the three levels of governments. Direct employment from snowmobile expenditures resulted in employment comprising 4,817 equivalent full-year jobs, the majority in the service industry including jobs in restaurants and accommodation. Accounting for indirect and induced impacts, snowmobile related expenditures in the province supported a total of 8,746 equivalent full-year jobs. This overall economic impact is based on a combined $664 million in snowmobile related expenditures by Ontario residents and the Ontario Federation of Snowmobile Clubs (Paula Neice and Associates, 2005).

Economic Impact of Snowmobiling in Comparable Jurisdictions

In addition to the Ontario studies, there have also been several studies on the economic impact of snowmobiling in other regions including, Alberta (2011); Quebec (2012); Maine (1996); Michigan (1998); and, Minnesota (2005). Like Ontario, these studies have demonstrated the value of snowmobiling to the respective provincial or state governments.

In Alberta, an input-output model developed by Econometric Research Ltd. was used to calculate the economic impact of snowmobiling in the province. No direct survey of snowmobilers was done. Estimates suggest that total expenditures on snowmobiles and related activities in Alberta exceeded $366.5 million in 2009. The contribution to Gross Provincial Product (GPP) was $387 million in 2009. The total impact on the economy using all multipliers was $810 million. This expenditure estimate includes capital expenditures by snowmobilers and snowmobile clubs or associations of approximately $111.7 million and tourism expenditures of $254.7 million. Not included in this total is the money raised and spent by snowmobiling associations and clubs, primarily through permit sales. Jobs for thousands of Albertans; jobs which enable them to further stimulate the economy through additional expenditures on goods and services; jobs which provide significant income tax revenues to provincial, local and federal treasuries and dramatically reduce unemployment and welfare payments. More than 6,574 Albertans owe their full time jobs to the recurrent capital and operational expenditures of snowmobile enthusiasts. Wages and salaries in Alberta are augmented by a total of about $213.9 million annually by the snowmobiling expenditures in 2009. It was noted in the Alberta study that the economic impact has been

greatest in rural regions of the province where snowmobiling is more prevalent. Snowmobiling has turned into one of the major new sources of income and employment for many remote communities in Alberta where snowmobile tourism has become synonymous with economic development (Econometric Research Limited, 2011).

A study of the economic impacts of snowmobiling was most recently completed in 2012 for the Province of Quebec. The Federation des Club de Motoneigistes du Quebec (FCMQ) has 80,000 members and more than 32,000km of trails throughout the province. Quebec is the most comparable jurisdiction to Ontario given the nature of the climate and location, as well as similar club qualities. From the 2011 season it was found that the snowmobile industry of Quebec generates economic benefits estimated at $2 billion (Zins, 2012). The Quebec study reviewed the economic returns related to the following variables:

- Spending made by snowmobilers on trips or vacations ($939.8 million)
- Manufacturing snowmobiles and groomers in Quebec ($749.7 million)
- Sales of new snowmobiles in Quebec ($47 million)
- Benefits related to the maintenance of trails ($164 million)
- Sales of groomers in Quebec ($138 million)

For all variables, the study had an increased value in the benefit to the province. It is important to note that Quebec has manufacturing industry for snowmobiles and groomers, while Ontario only manufactures grooming equipment and towing vehicles/trailers. For the Quebec study, no economic impact model was used. The authors of the study state that the value of the snowmobile industry in Quebec is based on the quality of the snow and the 32,000km of trails (Zins, 2012).

The Maine study surveyed those with registered snowmobiles in Maine and snowmobilers in New Hampshire (New Hampshire residents are also permitted to ride in Maine) to measure the economic impact of snowmobiling in Maine during the 1995-1996 season. It was found that over $225 million were generated using an input-output model of the Maine economy. The total impact is composed of $152 million in direct impacts and $73 million in indirect and induced impacts. This study also provides a description of the socio-demographic characteristics of snowmobilers in Maine, which like the Ontario studies has found to be predominately male, as represented in the surveys completed. Snowmobiles, both new and used accounted for nearly 50% of all expenditures between 1995 and 1996. Trailers and other accessories, insurance, trip expenses and repair and maintenance were also included in the study of expenditures (Reiling, S. D., Kotchen, M. J., and R. L. Bennett, 1996).

A study of snowmobiling in Michigan provides the comprehensive information regarding snowmobile activity and spending in Michigan and five sub-regions from the 1996-1997 season. Data was gathered from a representative sample of Michigan snowmobilers using a mailed survey of snowmobilers who had purchased one or more Michigan Trail Permits between October 1, 1995 and September 30, 1996. Of 3,152 valid addresses 1,535 surveys were returned. The economic impacts of snowmobiling are estimated by the following general equation:

*Impact = # of snowmobile days * average spending per snowmobile day * regional multiplier*

Multipliers are derived from input-output models for the state and sub-regional economies estimated using the IMPLAN system. It was found that approximately 100,000 households with snowmobile trail permits spent $160 million on trips and $400 million on equipment-related items. Snowmobiling is a large tourism attraction for the state. It was found that snowmobile trip spending is about 2% of all tourism trip spending in Michigan and 37% of the $132 million spent on overnight or day trips of more than 100 miles were from out-of-state snowmobilers. Like many jurisdictions, registrations had declined since the 1980s, but it was found that the economic impacts of snowmobiling in 1996-1997 were still significant. In Michigan, since the 1970's, a significant snowmobile industry has developed in the state including snowmobile dealers, resorts, snowmobile clubs, and a statewide system of trails and facilities, similar to Ontario (Stynes, D. J., Nelson, C. M., J. A. Lynch, 1998).

In 1996, a Minnesota study found the economic impacts contributed $300 million toward Minnesota's gross state product and approximately 5,900 jobs. Including non-resident expenditures, snowmobiling expenditures totaled $199.6 million, of which 92 percent comes from resident expenditures. The study included a survey of registered Minnesota snowmobilers as well as snowmobile manufactures and retailers. Approximately 43% or $78.6 million of the total residential expenditures are spent in the destination area within the state, the rest of the expenditures ($105.6 million) are spent at home and en route to the destination. When residents and non-residents snowmobile throughout the state, significant direct, indirect and induced impacts flow into the local areas visited. Direct impacts refers to the impact of the actual activity (the expenditures of snowmobilers) indirect refers to industry suppliers and induced to industry employee spending impacts on the Minnesota economy (Schneider, I. E., Elisabeth, P., Salk, R., T. Schoenecker, 2005).

The economic impact of snowmobiling in provinces across Canada many northern states in the United States is substantial. Expenditures by snowmobilers includes spending on sleds, insurance, maintenance, fuel and oil, food and beverage, and accommodation. This spending results in direct and indirect impacts on GDP, taxes and employment. From the review of studies completed it is evident that the economic impact of snowmobiling is significant in Ontario where the impact was found to be among the highest, second only to Quebec.

Study Approach

Ontario's Tourism Regional Economic Impact Model

The Ontario Ministry of Tourism, Culture & Sport supports the TREIM process to determine the economic impact of visitors' and businesses' spending in this tourism sector on the local and provincial economies. TREIM produces estimates of the direct, indirect and induced impacts of tourism-related activities on Gross Domestic Product (GDP), labour income and employment as well as estimates of the direct and total impacts of tourism-related activities on federal, provincial and municipal tax revenues. TREIM is a multi-region input-output model with 49 census divisions, 14 census metropolitan areas, 13 travel regions, and the entire province of Ontario. TRIEM has been used to estimate the impact assessment of the Toronto International Film Festival as well as the Trent-Severn Waterway National Historic Site of Canada (The Centre for Spatial Economics, 2008; TCI Management Consultants, 2010). TREIM was developed for the Province by the Conference Board of Canada using their national input output models.

TREIM considers three types of new expenditure in an economy. These are:

1. The construction of a new facility (i.e. arena, theatre, trails), typically a one-time investment into a region.
2. The operations of a new project or endeavour, in terms of its purchase of employment, goods and services in the region under consideration. The economic impacts of these operations of the business are ongoing, and typically measured on an annual basis.
3. The expenditures of visitors, tourists and/or clients who are either drawn into the area where they otherwise would not have visited or those who are already in the area (TCI Management Consultants, 2010).

This study focused on item 3 from the list above. While it was noted that there was $1.5 million in provincial funding provided to improve and maintain trails, this was not included in the economic impact assessment.

Throughout the study there are comparisons to previous studies of the economic impact of snowmobiling in Ontario. These studies used the TEAM model for the assessment. The TEAM model is a national model run by the Conference Board of Canada. TREIM and TEAM models are similar, both are input-output models that have been created for the tourism sector. TREIM was developed for the province of Ontario with the assistance of the Conference Board and uses the same methodology.

Survey of Ontario Snowmobilers

In consultation with OFSC, HCA developed and implemented an online survey to collect data on snowmobiling habits and expenditures in the 2013-2014 season. HCA used a web survey development cloud based program, Survey Monkey. The survey instrument was pretested. The revised survey was sent out by OFSC to approximately 60,000 individuals using an email database that included those who purchased an OFSC permit in 2013-2014 or in a previous season or as well as individuals with another connection to OFSC.

For the survey instrument, please refer to the Appendices.

Key Informant Interviews

In consultation with OFSC, HCA developed and facilitated key informant interviews with District Operations Coordinators. An invitation was sent to each of the 15 District Operations Coordinators by OFSC and a second invitation by HCA. There were eight interviews completed over the telephone, lasting approximately 20 minutes each.

For the key informant guide, please refer to the Appendices.

Findings

Household Characteristics

Almost 90% of 4,588 survey respondents were male. Many of these respondents' indicated that they participate in snowmobiling with a partner, often female, and to a lesser extent with their children. All of the key informants interviewed were male, most of whom sled with their wife.

Table 1: Gender of Survey Respondents

Gender	#	%
Male	4,116	89.7
Female	472	10.3
Total	4,588	100
No Response	344	

Household size of survey respondents ranged between 1 and 9. The most common household size among survey respondents was 2, followed by 4. Among survey respondents, the average household had 2.95 individuals.

Table 2: Household Size of Survey Respondents

Household Size	#	%	Cumulative %
1	250	5.6	5.6
2	1,841	41.1	46.7
3	826	18.4	65.2
4	1,134	25.3	90.5
5	340	7.6	98.1
6	68	1.5	99.6
7	10	0.2	99.8
8	7	0.2	100
9	1	0	100
Total	4,477	100	
No Response	455		

Almost 90% of 4,592 survey respondents were married or in a common law relationship. Another 8% reported themselves as single and 3.5% were divorced or separated at the time of the survey.

Table 3: Marital Status of Survey Respondents

Marital Status	#	%
Single	364	7.9
Married/Common Law	4,030	87.8
Divorced/Separated	163	3.5
Widowed	35	0.8
Total	4,592	100
No Response	340	

The average age of survey respondents was 49.6 years; almost half of the survey respondents were 50 years or older. In addition to the survey respondents' themselves, the age of household members participating in snowmobiling ranged from 1 to 85, with an average age of 40.6 years. The interviewees confirmed that the average age of snowmobilers in the province is aging, many active in snowmobiling are in their retirement. One interviewee, however, indicated that snowmobiling has become more of a family activity, he has observed a trend over the last ten years of more females and young children on the trails. There is evidence of this in Table 4, as 18.27% of those active in snowmobiling are 19 years or younger.

In comparison to the province as a whole in Figure 1, there is a greater proportion of those 40-59 years active in snowmobiling. Perhaps not surprising, there is a smaller proportion of those participating in snowmobiling 65 years and older than the province overall.

Table 4: Age of Survey Respondents

Age Category	Survey Respondents			All Household Members		
	#	%	Cumulative %	#	%	Cumulative %
0-19	52	1.1	1.1	1,892	18.3	18.3
20-24	60	1.2	2.3	678	6.6	24.8
25-29	135	2.8	5.0	535	5.2	30.0
30-34	229	4.7	9.7	492	4.8	34.7
35-39	373	7.6	17.3	373	3.6	38.3
40-44	565	11.5	28.8	935	9.0	47.4
45-49	883	18.0	46.8	1,452	14.0	61.4
50-54	914	18.6	65.4	1,510	14.6	76.0
55-59	853	17.4	82.8	1,299	12.5	88.5
60-64	428	8.7	91.5	619	6.0	94.5
65-69	255	5.2	96.7	357	3.5	97.9
70-74	128	2.6	99.3	169	1.6	99.6
75-79	28	0.6	99.9	38	0.4	99.9
80+	6	0.1	100.0	7	0.1	100.0
Total	4,909	100.0		10,356	100.0	
Average	49.6			40.6		

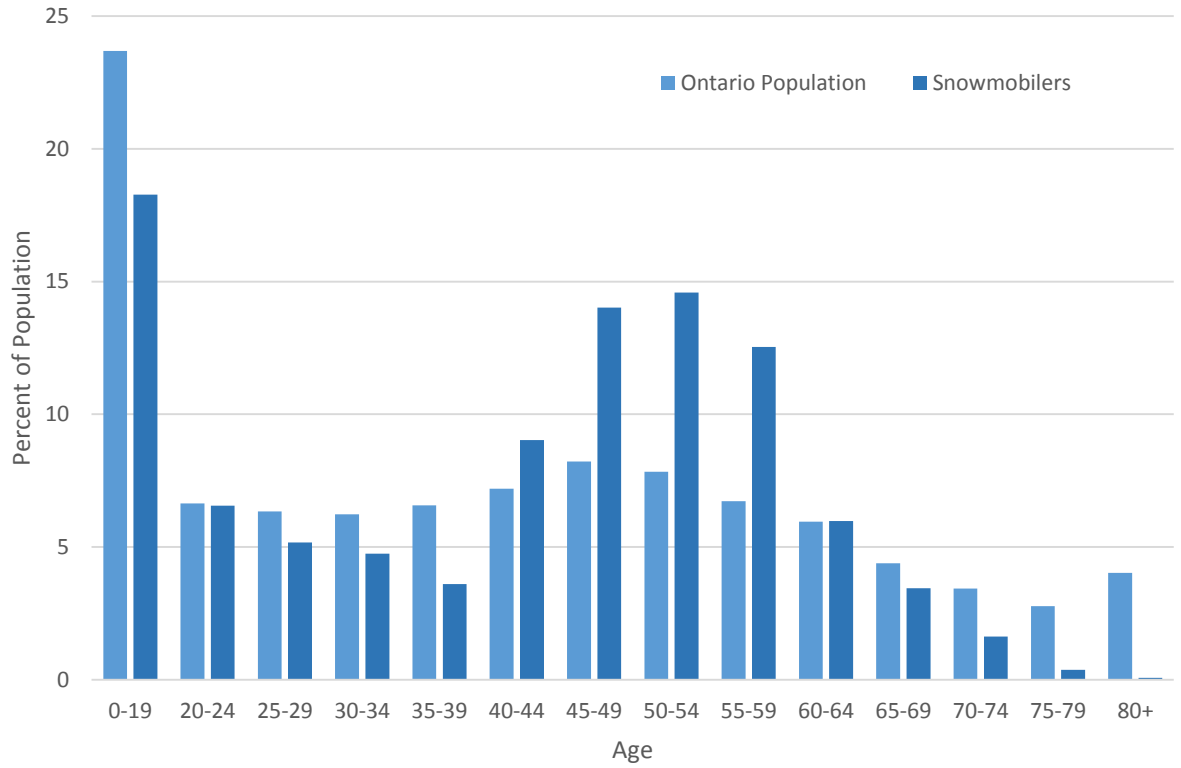

Figure 1: Age Comparison, Survey Respondents and Ontario Population[1]

In Table 5, we see that College, CEGEP or other non-university certificate or diploma was the most common level of education completed among the survey respondents, with 31.9% of survey respondents. Another 21.1% reported high school as their highest completed education and 20.2% had completed an apprenticeship or trade. Snowmobiling may be less popular among university graduates, as only 16.6% of survey respondents had completed a Bachelor's degree or higher.

In comparison to the province, there is a significantly greater proportion of snowmobilers who have completed a college or apprenticeship program, as illustrated below in Figure 2. The proportion of snowmobilers who have completed a university degree is less than the proportion of the Ontario population in the same education level. The proportion of Ontario residents whose maximum education is high school or less is higher than snowmobilers.

[1] National Household Survey (NHS) Profile. 2011 Census.

Table 5: Highest Education Level Attained by Survey Respondents

Education Level	#	%	Cumulative %
Less than high school	90	2.1	2.1
High school	938	21.1	23.2
Apprenticeship or trades certificate or diploma	898	20.2	43.4
College, CEGEP or other non-university certificate or diploma	1,416	31.9	75.4
University certificate, diploma or degree at bachelor level or above	359	8.1	83.4
Bachelor's degree	407	9.2	92.6
University certificate, diploma or degree above bachelor level	327	7.4	100
Total	4,435	100	
No Response	178		

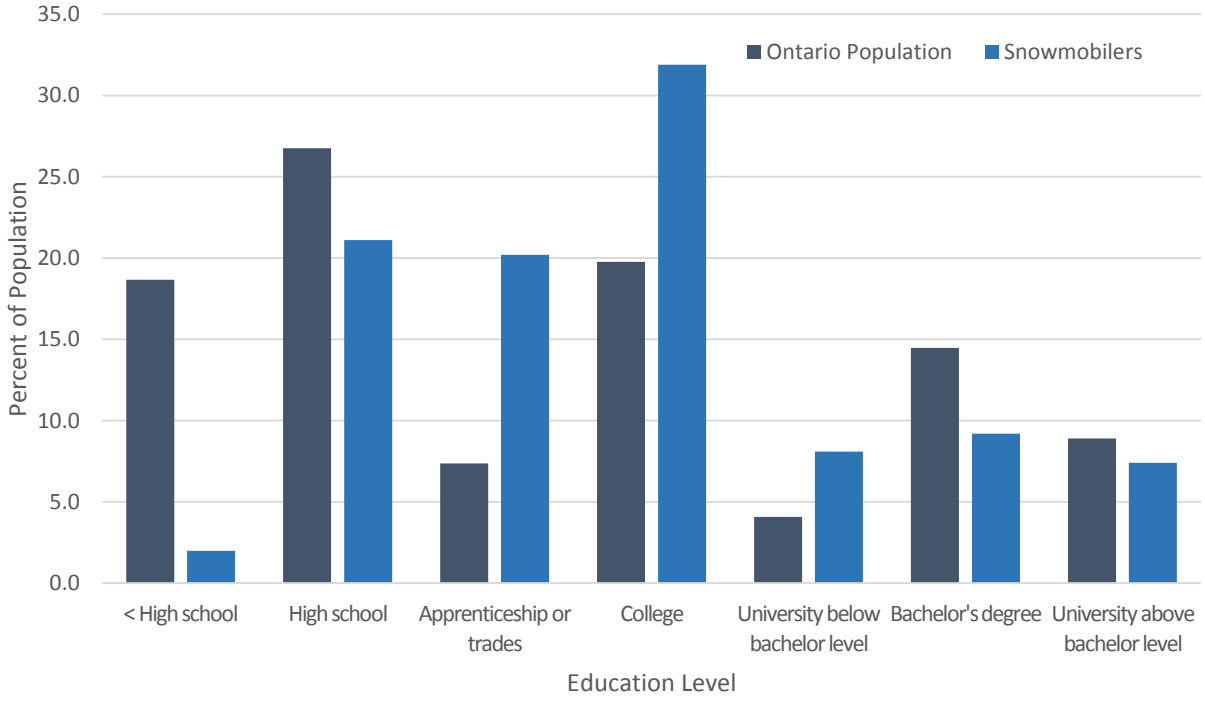

Figure 2: Education Level Comparison, Survey Respondents and Ontario Population[2]

[2] National Household Survey (NHS) Profile. 2011 Census.

More than 90% of respondents reported an average household income more than $50,000 per year (Table 6). Almost 60% of respondents reported an average household income greater than $100,000 per year.

In comparison to the province, the self-reported annual household income of the snowmobilers is higher. There is a greater proportion of snowmobilers in all four income categories of $80,000 and higher than the province as a whole (Figure 3). The distribution of income among households in the province is more evenly distributed than the distribution of income among the snowmobilers surveyed.

Table 6: Average Household Income of Survey Respondents

Household Income	#	%	Cumulative %
$10,000 to $14,999	12	0.3	0.3
$15,000 to $19,999	10	0.3	0.6
$20,000 to $29,999	42	1.1	1.7
$30,000 to $39,999	91	2.4	4.1
$40,000 to $49,999	157	4.1	8.2
$50,000 to $59,999	222	5.8	14.0
$60,000 to $79,999	489	12.8	26.8
$80,000 to $99,999	590	15.4	42.2
$100,000 to $124,999	701	18.3	60.5
$125,000 to $149,999	510	13.3	73.8
$150,000 and over	1,000	26.2	100
Total	3,824	100	
No Response	1,108		

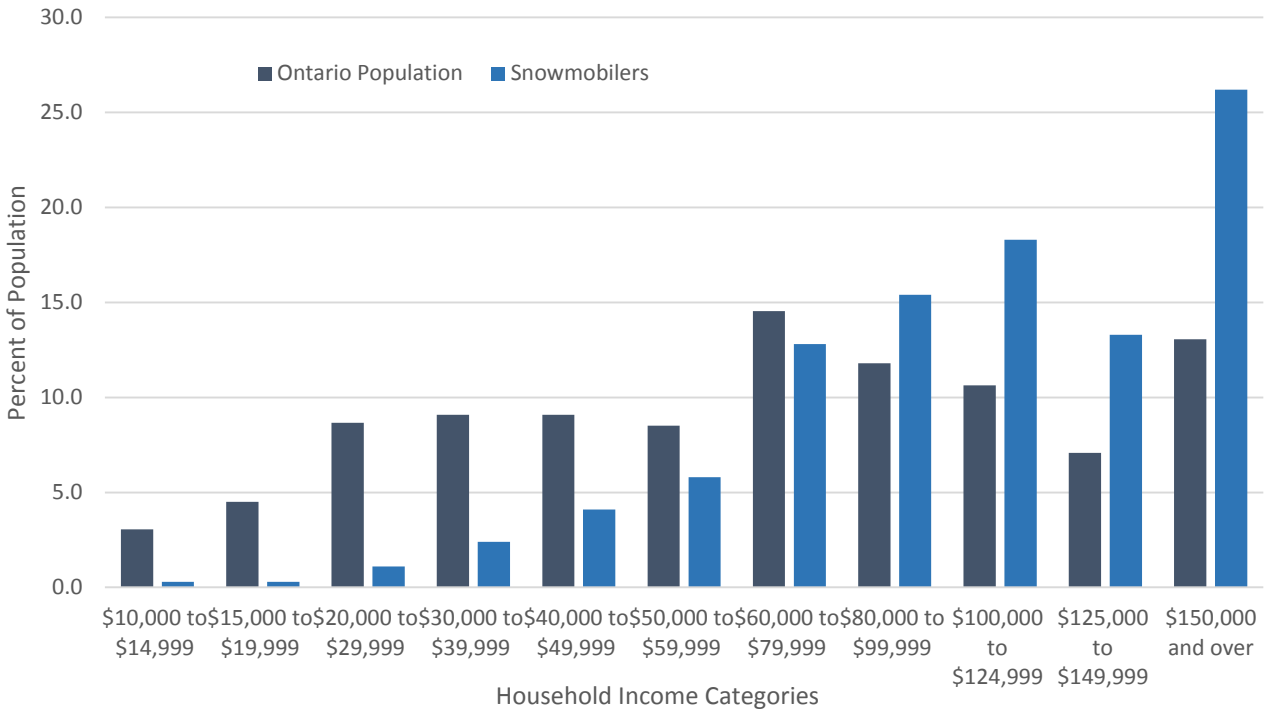

Figure 3: Household Income Comparison, Survey Respondents and Ontario Population[3]

Participation in Snowmobiling

As weather reports and the key informant interviewees indicated, the 2013-2014 winter snow and cold temperatures made for excellent snowmobiling conditions. Likely related, 63.6% of those surveyed reported they snowmobiled more than most seasons in 2013-2014. Approximately a quarter of survey respondents said they snowmobiled about the same as most season, only 7.4% snowmobiled less than most seasons. There were 154 new snowmobilers in 2013-2014 among survey respondents.

Table 7: Participating in Snowmobiling during the 2013-2014 Season

Comparison to Previous Seasons	#	%
More than most seasons	3,104	63.6
About the same as most seasons	1,242	25.4
Less than most seasons	363	7.4
2013-2014 was my first snowmobile season	154	3.2
Not at all	21	0.4
Total	4,884	100

From Table 8, 4,847 survey respondents indicated they went on at least one day trip during the 2013-2014 season. Almost 40% of survey respondents reported they went on 2-3 day trips in the 2013-2014 season, while another 25% went on a day trip approximately once a week. Under the

[3] National Household Survey (NHS) Profile. 2011 Census.

conservative assumption there were 14 weeks or 3 months in the 2013-2014 season the average survey respondent went on 24 day trips in the season.

Table 8: Frequency of Day Trips Reported by Survey Respondents

Day Trips	#	%
6-7 per week	74	1.5
4-5 per week	319	6.5
2-3 per week	1,894	38.5
Once per week	1,198	24.4
Three times per month	606	12.3
Twice per month	393	8.0
Once a month	192	3.9
Less than once a month	171	3.5
Never	70	1.4
Total	4,917	100.0
Average	24 day trips in 2013-2014	

From Table 9, 2,974 survey respondents indicated they went on at least one overnight trip of one to three nights away from home during the 2013-2014 season. Almost 20% of survey respondents reported they went on one overnight trip and another 15.02% went on two overnight trips of one to three nights away from home. On average, survey respondents went on between 2 and 3 overnight trips away from home during the 2013-2014 season.

Table 9: Frequency of Overnight Trips Reported by Survey Respondents

Trips (1-3 Nights)	#	%
1	964	19.7
2	734	15.0
3	491	10.1
4	266	5.4
5	163	3.3
6	115	2.4
7	65	1.3
8	54	1.1
9	11	0.2
10 or more	111	2.3
Never	1,913	39.1
Total	4,887	100.0
Average	2.6	

Tours refer to overnight trips of more than three nights away from home. From Table 10, approximately 35% of survey respondents indicated they went on at least one tour during the 2013-2014 season. Almost 20% of survey respondents reported they went on one overnight trip and another 7.8% went on two tours away from home. On average, survey respondents went on less than 1 tour during the 2013-2014 season.

Table 10: Frequency of Tours Reported by Survey Respondents

Tours	#	%
1	1,015	20.7
2	380	7.8
3	170	3.5
4	72	1.5
5	43	0.9
6	23	0.5
7	7	0.1
8	9	0.2
9	2	0.0
10 or more	23	0.5
Never	3,159	64.4
Total	4,903	100.0
Average	0.7	

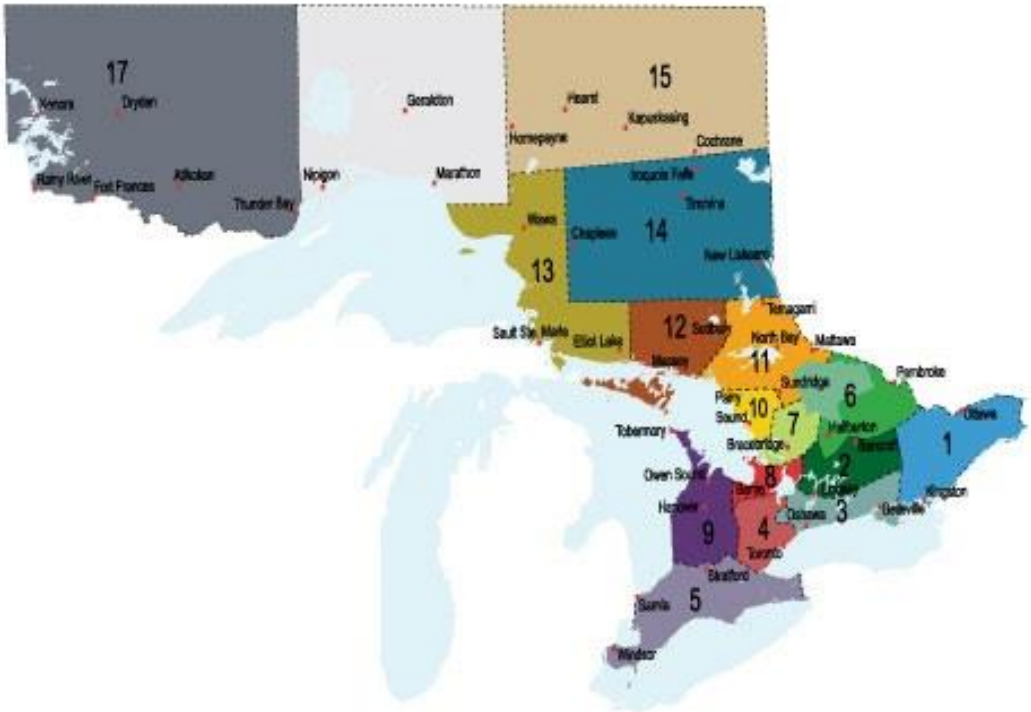

Figure 4: Map of OFSC Districts

There were survey respondents from each of the 17 OFSC Districts and an additional 42 respondents with a primary residence outside of Ontario. District 5 (Windsor, Sarnia and Stratford) had the greatest representation with 18.3% of the survey respondents followed by District 4 (GTA) and District 1 (Ottawa, Kingston). It is likely that most trips from these survey respondents originate from these Districts, especially day trips.

From Table 11, 2,770 survey respondents indicated they own a secondary or vacation home. District 6 (Haliburton, Pembroke) was the most common District for vacation homes among the survey respondents followed by District 2 (Lindsay, Bancroft) and District 7 (Muskoka, Huntsville). The Districts with a higher prevalence of vacation homes are likely to be destinations or accommodation for overnight trips and tours.

Table 11: Place of Residence of Survey Respondents

District	Primary Residence		Secondary (Vacation) Residence	
	#	%	#	%
1	537	12.5	91	3.3
2	223	5.2	278	10.0
3	394	9.2	32	1.2
4	619	14.4	7	0.3
5	783	18.3	28	1.0
6	155	3.6	291	10.5
7	153	3.6	226	8.2
8	293	6.8	115	4.2
9	392	9.1	140	5.1
10	63	1.5	201	7.3
11	120	2.8	181	6.5
12	226	5.3	100	3.6
13	97	2.3	49	1.8
14	74	1.7	62	2.2
15	31	0.7	19	0.7
17	72	1.7	32	1.2
OFSC District	14	0.3	13	0.5
Outside Ontario	42	1.0	30	1.1
Total	4,288	100	2,770	100.00

Survey respondents were asked to indicate which Districts they primarily ride during a typical season. District 9 (Grey Bruce, Owen Sound) was the most commonly reported District for survey respondents to primarily ride with 12.97%. District 1 (Ottawa, Kingston) follows with 10.76% and then District 6 (Haliburton, Pembroke) with 10.04%.

Table 12: The District Where Survey Respondents Most Commonly Ride

Districts	Primarily Ride	%
1	462	10.8
2	404	9.4
3	180	4.2
4	101	2.4
5	322	7.5
6	431	10.0
7	417	9.7
8	329	7.7
9	557	13.0
10	227	5.3
11	272	6.3
12	220	5.1
13	107	2.5
14	100	2.3
15	51	1.2
17	80	1.9
OFSC District	13	0.3
Outside Ontario	21	0.5
Total	4,294	100.0

The survey also asked about the Districts the survey respondents ride second and third most often. When looking at the Districts respondents ride most frequently, second most frequently and third most frequently, District 6 (Haliburton, Pembroke) was most commonly reported as a riding destination with 13.02% of all reported destinations, this overlaps with a common vacation home District. District 7 (Muskoka, Huntsville) and District 11 (North Bay, French River) were the second and third most common Districts that survey respondents ride with 11.73% and 9.76% of responses.

District 1 (Ottawa, Kingston) was ranked as the second most common District to primarily ride, but dropped considerably when respondents were asked to rank the Districts they ride second and third most frequently, this may be due to the proximity to Quebec and the relative distance to other Ontario Districts compared to central Districts of the province. The distance to be travelled to reach them and the low population counts of Districts in northern Ontario could explain low numbers in this region.

Table 13: Districts Where Survey Respondents Most Commonly Ride

Districts	Primarily Ride	2nd Most Likely to Ride	3rd Most Likely to Ride	Total	%
1	462	87	80	629	5.9
2	404	304	231	939	8.8
3	180	103	114	397	3.7
4	101	112	136	349	3.3
5	322	196	92	610	5.7
6	431	604	355	1,390	13.0
7	417	430	405	1,252	11.7
8	329	258	217	804	7.5
9	557	312	129	998	9.4
10	227	226	244	697	6.5
11	272	376	394	1,042	9.8
12	220	89	85	394	3.7
13	107	59	38	204	1.9
14	100	178	181	459	4.3
15	51	93	118	262	2.4
17	80	12	7	99	0.9
OFSC District	13	14	18	45	0.4
Outside Ontario	21	41	41	103	1.0
Total	4,294	3,494	2,885	10,673	100.00

Snowmobiles

The year in which survey respondents reported purchasing a snowmobile, new or used, varied considerably. Approximately 7.5% of all snowmobiles reported in the survey were purchased in 2014, another 17.47% were purchased in 2013. More than a quarter of snowmobiles were purchased between 2005 and 2009. Just slightly less than 4.66% of snowmobiles reported in the survey were purchased in 1999 or later.

Table 14: Year of Purchase, Snowmobile, as Reported by Survey Respondents

Year Purchased	#	%
2014	697	7.5
2013	1,625	17.5
2012	1,186	12.8
2011	1,055	11.3
2010	1,068	11.5
2005-09	2,389	25.7
2000-06	848	9.1
1999 and later	433	4.6
Total	9,301	100.0

The model year survey respondents reported for their snowmobiles varied considerably. Almost 5% of all snowmobiles reported in the survey were model year 2014, another 5.69% in 2013.

Almost one third of snowmobiles had a model year between 2005 and 2009. Almost 20% had a model year of 1999 or later.

Table 15: Model Year, Snowmobile, as Reported by Survey Respondents

Model Year	#	%
2014	441	4.7
2013	534	5.7
2012	604	6.4
2011	596	6.4
2010	605	6.4
2005-2009	2,901	30.9
2000-2004	1,844	19.6
1999 and older	1,864	19.9
Total	9,389	100.0

The Province of Ontario requires a valid trail permit on every machine that is active on Ontario trails, and as such there are various types of permits available to riders for their machines, as listed below. In total there were 8,677 snowmobiles reported among the survey respondents as having a trail permit. The survey respondents as a whole had 676 machines without a permit of any kind. A Seasonal Permit is the most common with 74.5% of reported snowmobiles attached to this permit type. The province offers season permits, though OFSC, for discounted prices depending on time of purchase (i.e. early bird pricing), 60.4% of permits were purchased at $180. Another 12.14% of snowmobiles had the Classic Permit. Almost 5% of the snowmobiles listed by survey respondents had a “Try Our Trails” Permit.

Table 16: Permit Type as reported by Survey Respondents

OFSC Permit Type	#	%
Seasonal Permit	6,968	74.5
$260	437	4.7
$210	882	9.4
$180	5,649	60.4
Classic Permit	1,135	12.1
$170	187	2.0
$140	948	10.1
7 Day Permit	28	0.3
3 Day Permit	103	1.1
Special Event	7	0.1
Try Our Trails	436	4.7
No Permit	676	7.2
Total	9,353	100.0

Annual Spending

Those who participate in snowmobiling are subject to spending on a variety of items on an annual basis including insurance and trail permits, occasionally the purchase of a snowmobile, repairs and maintenance and smaller ticket items such as clothing.

For the purpose of this assessment only the snowmobiles purchased in 2013-2014 were reviewed. There were 1,805 households that indicated they purchased one or more snowmobile, new or used, in 2013-2014. The average amount spent on the purchase of one or more snowmobile in 2013-2014 was $9,754.22.

Table 17: Cost of Snowmobile Purchases in 2013-2014 Reported by Survey Respondents

Cost of Snowmobile(s) Purchased in 2013-2014	#	%
$1-1,000	86	4.8
$1,001-2,000	144	8.0
$2,001-3,000	100	5.5
$3,001-4,000	121	6.7
$4,001-5,000	121	6.7
$5,001-7,500	222	12.3
$7,501-10,000	244	13.5
$10,001-15,000	498	27.6
$15,001-20,000	131	7.3
$20,001-25,000	70	3.9
$25,001-30,000	47	2.6
More than $30,000	21	1.2
# of Households that Purchased at Least One Snowmobile in 2013-2014	1,805	
Average Amount Spent on Purchase in 2013-2014	$9754.44	

From Table 18, 4,883 survey respondents reported they purchased insurance for one or more snowmobile in the 2013-2014 season. The average household spent $559.10 on insurance annually.

Table 18: Annual Insurance Cost per Household

Insurance Cost	#	%
$1-100	89	1.8
$101-200	512	10.5
$201-300	770	15.8
$301-400	771	15.8
$401-500	688	14.1
$501-750	1,019	20.9
$751-1,000	613	12.5
$1,001-1,500	315	6.5
$1,501-2,000	70	1.4
More than $2,000	36	0.7
Total	4,883	100.0
No Response	47	
Average	559.1	

The annual repairs and maintenance, as well as emergency repairs while on a trip were examined to get a better understanding of costs associated with cost regular maintenance per household. Households spent, on average $1,596.58 per year repairing and maintaining their snowmobile or snowmobiles.

Table 19: Repairs and Maintenance Spending, as Reported by Survey Respondents

Repairs and Maintenance Costs	#	%
$1-100	306	6.2
$101-200	466	9.4
$201-300	428	8.7
$301-400	283	5.7
$401-500	485	9.8
$501-750	369	7.5
$751-1,000	457	9.3
$1,001-1,250	207	4.2
$1,251-1,500	217	4.4
$1,501-1,750	72	1.5
$1,751-2,000	203	4.1
More than $2000	849	17.2
0	590	12.0
Total	4,932	100.0
Average	$1,596.58	

Survey respondents were asked to report how much they spent on snowmobile related clothing for the 2013-2014 season. This clothing could include items such as helmets, suits, gloves and boots. One third of the respondents reported that they did not spend any money on snowmobiling

clothing for the 2013-2014. Approximately 12% spent between $1 and $100, another 12.29% spent between $101 and $200 for the 2013-2014 season. Some households spent considerable amounts of money on clothing, almost 20% of respondents spent over $500 in a typical year. On average snowmobilers who purchased clothing spent $322.44.

Table 20: Amount Spent on Clothing Annually, Reported by Survey Respondents

Amount Spent on Clothing	#	%
$1-100	608	12.3
$101-200	606	12.3
$201-300	495	10.0
$301-400	262	5.3
$401-500	451	9.2
$501-750	258	5.2
$751-1,000	337	6.8
$1,001-2,000	239	4.9
$2,001-3,000	30	0.6
$3,001-4,000	4	0.1
$4,001-5,000	3	0.1
More than $5,000	2	0.1
0	1,636	33.2
Total	4,931	
Average	$322.44	

Day Trip Spending

Spending on food and beverage and fuel/oil for day trips was examined to get a sense of how much money households spend on short trips. As found above, 4,847 survey respondents indicated they went on at least one day trip during the 2013-2014 season. Under the conservative assumption that there were 14 weeks or 3 months in the 2013-2014 season the average survey respondent went on 24 day trips in the season.

Food and beverage expenditures at restaurants and stores were examined for the purpose of the study. More households spend money on food and beverage at a restaurant than at stores while on day trips. Households most commonly spend between $1 and $50 on food and beverage, whether at a store or restaurant, while on a snowmobiling day trip. Almost 25% of respondents reported that their household spends more than $100 at a restaurant per day trip. On average, households spent $110.53 at a restaurant and $44.47 at a store on food and beverage.

Table 21: Spending on Food and Beverage, Day Trips, as Reported by Survey Respondents

Amount Spent on Food and Beverage	Restaurant #	Restaurant %	Store #	Store %
$1-50	1,904	47.2	1,565	58.7
$51-100	980	24.3	286	10.7
$101-150	174	4.3	52	2.0
$151-200	241	6.0	128	4.8
$201-250	51	1.3	24	0.9
$251-500	526	13.0	62	2.3
$0	158	3.9	550	20.6
Total	4,034	100.0	2,667	100.0
Average	$110.53		$44.47	

The cost of fuel and oil for day trips is a major expense. 3,126 survey respondents reported spending on fuel for the snowmobile for day trips and 1,937 survey respondents reported spending on fuel for a towing vehicle used for a day trip. On average, households spend $82.88 per day trip of fuel and oil for snowmobiles and $64.81 for a towing vehicle.

Table 22: Spending on Fuel/Oil, Day Trips, as Reported by Survey Respondents

Amount Spent Fuel/Oil	# Snowmobile	% Snowmobile	# Towing	% Towing
$1-50	1,064	33.7	746	29.6
$51-100	1,411	44.7	796	31.6
$101-150	387	12.3	171	6.8
$151-200	264	8.4	224	8.9
$0	29	0.9	585	23.2
Total	3,155	100.0	2,522	100.0
Average	$82.88		$64.81	

Overnight Trips

Spending on accommodation, food and beverage and fuel/oil for overnight trips of one to three nights away were examined to get a sense of how much money households spend on overnight trips. As found above, 2,974 survey respondents indicated they went on at least one overnight trip of one to three nights away from home during the 2013-2014 season. On average, survey respondents went on between 2 and 3 overnight trips away from home during the 2013-2014 season.

For trips of one to three nights away from home both food and beverage purchases at restaurants and stores were examined. On average, households spent $174.80 in restaurants and $68.45 in stores on a typical overnight trip away from home. Approximately 35% of households spend $100 or less during a typical overnight trip in a restaurant. There is a small proportion who spend more than $500 on food and beverage on an overnight trip in a restaurant.

Table 23: Spending on Food and Beverage, Overnight Trips, as Reported by Survey Respondents

Amount Spent on Food and Beverage	Restaurant #	Restaurant %	Store	Store %
$1-50	299	10.3	983	43.2
$51-100	725	24.9	411	18.1
$101-150	340	11.7	77	3.4
$151-200	417	14.3	122	5.4
$201-250	120	4.1	16	0.7
$251-500	455	15.6	85	3.7
$501-750	62	2.1	11	0.5
$751-1,000	48	1.7	10	0.4
More than $1,000	16	0.6	0	0.0
$0	434	14.9	559	24.6
Total	2,916	100.0	2,274	100.0
Average	$174.80		$68.45	

The fuel and oil costs for snowmobiles are an obvious and necessary expense for snowmobiling. From Table 24, 2,405 survey respondents reported spending on fuel or oil for their sled, while 1,824 reported spending on fuel or oil for a towing vehicle. More than half of respondents reported spending between $1 and $200, with an average household spending $177.77 on fuel for their sled. The average household spent $128.73 for a towing vehicle.

Table 24: Spending on Fuel/Oil, Overnight Trips, as Reported by Survey Respondents

Amount Spent Fuel/Oil	# Snowmobiles	% Snowmobiles	# Towing	% Towing
$1-50	146	5.2	179	7.5
$51-100	557	19.9	608	25.4
$101-150	431	15.4	307	12.8
$151-200	438	15.6	346	14.4
$201-250	169	6.0	87	3.6
$251-300	278	9.9	135	5.6
$301-350	57	2.0	17	0.7
$351-400	130	4.6	67	2.8
$401-450	28	1.0	7	0.3
$451-500	107	3.8	4	0.2
More than $500	65	2.3	28	1.2
$0	397	14.2	572	23.9
Total	2,802	100.0	2,396	100.0
Average	$177.77		$128.73	

When participating in overnight trips of one to three nights away from home snowmobilers have options for accommodations including private cottages or vacation homes, hotels or motels, lodges, or bed and breakfasts. Of the 2,725 survey respondents 22.9% reported they do not spend any money on accommodations on overnight trips. Approximately 27% reported spending

between $101 and $200 on accommodations while another 15.41% reported between $201 and $300. Less than 10% reported they spent more than $500 for accommodations for an overnight trip of one to three nights away from home.

Table 25: Accommodation Spending, Overnight Trips, as Reported by Survey Respondents

Amount Spent on Accommodation	#	%
$1-50	48	1.8
$51-100	324	11.9
$101-200	722	26.5
$201-300	420	15.4
$301-400	183	6.7
$401-500	174	6.4
More than $500	230	8.4
$0	624	22.9
Total	2,725	100.0
Average	$225.22	

Tours

Spending on accommodation, food and beverage, fuel/oil, repairs and any rental fees for tours of more than three nights away were examined to get a sense of how much money households spend on these extended trips. From above, 1,744 survey respondents indicated they went on at least one tour during the 2013-2014 season. On average, survey respondents went on less than 1 tour during the 2013-2014 season.

The amount spent on food and beverage in restaurants on tours ranged between $1 to more than $2,000. On average, survey respondents reported spending $233.62 on food and beverages from a restaurant while on a tour. This number is quite a bit lower, at $79.98 for spending in stores for food and beverage.

Table 26: Food and Beverage Spending, Tours, as Reported by Survey Respondents

Amount Spent on Food and Beverage	# Restaurant	% Restaurant	# Store	% Store
$1-50	47	2.6	327	20.7
$51-100	117	6.6	243	15.4
$101-150	90	5.1	105	6.7
$151-200	195	11.0	113	7.2
$201-250	105	5.9	23	1.5
$251-500	447	25.1	105	6.7
$501-750	89	5.0	8	0.5
$751-1,000	48	2.7	2	0.1
$1,001-1,250	12	0.7	1	0.1
$1,251-1,500	10	0.6	1	0.1
$1,501-1,750	3	0.2	0	0.0
$1,751-2,000	7	0.4	0	0.0
More than $2,000	3	0.2	0	0.0
$0	608	34.1	650	41.2
Total	1,781	100.0	1,578	100.0
Average	$233.62		$79.89	

There were 1,139 survey respondents who reported spending money on fuel or oil for their snowmobile and 963 respondents reported spending money on fuel or oil for a towing vehicle on a tour. On average, survey respondents spend $239.51 on fuel or oil for their snowmobile while on a tour of four nights or more away from home, while they spend on average $150.37 on fuel or oil for their towing vehicle.

Table 27: Fuel/Oil Spending, Tours, as Reported by Survey Respondents

Amount Spent on Fuel/Oil	# Snowmobile	% Snowmobile	# Towing	% Towing
$1-50	28	1.6	39	2.4
$51-100	68	3.9	167	10.3
$101-150	85	4.9	120	7.4
$151-200	152	8.7	189	11.7
$201-250	97	5.6	86	5.3
$251-300	169	9.7	148	9.2
$301-350	51	2.9	25	1.6
$351-400	122	7.0	77	4.8
$401-450	35	2.0	11	0.7
$451-500	135	7.7	42	2.6
More than $500	197	11.3	59	3.7
$0	606	34.7	653	40.4
Total	1,745	100.0	1,616	100.0
Average	$239.51		$150.37	

When participating in tours of more than three nights away from home snowmobilers have accommodation options including private cottages or vacation homes, hotels or motels, lodges, or bed and breakfasts. Of the 1,753 survey respondents 38.16% reported they do not spend any money on accommodations on overnight trips. The average household spends $349.78 on accommodations per tour.

Table 28: Accommodation Spending, Tours, as Reported by Survey Respondents

Amount Spent on Accommodation	#	%
$1-100	45	2.6
$101-200	98	5.6
$201-300	173	9.9
$301-400	176	10.0
$401-500	184	10.5
$501-600	111	6.3
$601-700	57	3.4
$701-800	62	3.5
$801-900	18	1.0
$901-1,000	70	4.0
More than $1,000	90	5.1
$0	669	38.2
Total	1,753	100.0
Average	349.8	

Summary of Findings

The majority of respondents were males who were active snowmobilers. From the survey and interviews completed there has been evidence of more females and more children becoming active in snowmobiling. The average household had 2.95 individuals and most snowmobilers are married or in a common law relationship. In comparison to the province as a whole, there is a greater proportion of those 40-59 years active in snowmobiling. There is a smaller proportion of those participating in snowmobiling 65 years and older than the province overall. In comparison to the province, a greater proportion of snowmobilers have completed a college or apprenticeship program. The household income of those engaged in snowmobiling was relatively high compared to the province. Almost 60% of respondents reported an average household income greater than $100,000 per year.

Almost two thirds of snowmobilers were more active during the 2013-2014 season than previous seasons. It was found that 4,847 survey respondents indicated they went on at least one day trip during the 2013-2014 season, under the assumption that there were 14 weeks or 3 months in the 2013-2014 season the average snowmobiler went on 24 day trips during the 2013-2014 season. Another 2,974 survey respondents indicated they went on at least one overnight trip of one to three nights away from home during the 2013-2014 season, on average snowmobilers went on between 2.61 overnight trips away from home during the 2013-2014 season. Finally, 1,744 survey respondents indicated they went on at least one tour during the 2013-2014 season. On average, snowmobilers went on less than one tour during the 2013-2014 season.

There are snowmobilers across the province and non-Ontario residents using Ontario trails. From the survey, there is a concentration of snowmobilers with homes in Southwestern Ontario, the Greater Toronto Area (GTA) and Eastern Ontario. There is also a concentrations of vacation homes in the Ontario cottage county- Kawartha Lakes, Haliburton and Bracebridge.

It was found that Southwestern Ontario, in the Hanover and Owen Sound areas, were the most popular among snowmobilers followed by Eastern Ontario.

Those active in snowmobiling in Ontario own snowmobiles of all ages. Almost 5% of all snowmobiles were had a model year of 2014, another 5.69% in 2013. Almost one third of snowmobiles had a model year between 2005 and 2009. Almost 20% had a model year of 1999 or later.

There were 1,805 households that indicated they purchased one or more snowmobile, new or used, in 2013-2014. The average amount spent on the purchase of one or more snowmobile in 2013-2014 was $9,754.22.

Other annual expenses include insurance and permits. The average household spent $559.10 on insurance annually. The Province of Ontario requires a trail permit on every machine that is active on the OFSC trails, as such there are various types of Ontario snowmobile trail permits available to riders for their machines, as listed below. In total there were 8,677 snowmobiles reported as

having a trail permit. The survey respondents as a whole had 676 machines without a permit of any kind.

More households spend money on food and beverage at a restaurant than store while on any kind of trip (day trip, overnight or tour). Households most commonly spend between $1 and $50 on food and beverage, whether at a store or restaurant, while on a snowmobiling day trip. On average, households spend $110.53 at a restaurant and $44.47 at a store on food and beverage. On average, households spend $174.80 in restaurants and $68.45 in stores on a typical overnight trip away from home of one to three nights. On average, survey respondents reported spending $233.62 on food and beverages from a restaurant while on a tour. This number is quite a bit lower, at $79.98 for spending in stores for food and beverage.

The cost of fuel and oil for day trips is a major expense. On average, households spend $82.88 per day trip on fuel and oil for snowmobiles and $64.81 for a towing vehicle. For overnight trips more than half of respondents reported spending between $1 and $200, with an average household spending $177.77 on fuel for their sled and $128.73 for a towing vehicle. On average, survey respondents spend $239.51 on fuel or oil for their snowmobile while on a tour of four nights or more away from home, while they spend on average $150.37 on fuel or oil for their towing vehicle.

When participating in trips away from home snowmobilers have options for accommodations including private cottages or vacation homes, hotels or motels, lodges, or bed and breakfasts. Of the 2,725 survey respondents 22.9% reported they do not spend any money on accommodations on overnight trips. On average, snowmobilers spend $225.22 per overnight trip of one to three nights away from home. Of the 1,753 survey respondents 38.16% reported they do not spend any money on accommodations on overnight trips. The average household spends $349.78 on accommodations for tours.

The Economic Impact of Snowmobiling

The survey results were used to generate estimates of spending by snowmobilers on day trips, overnight trips and tours. For each of these types of trips estimates of spending on fuel/oil, food and beverage, accommodations, repairs, clothing, souvenirs and other items were calculated. In addition, respondents were asked to estimate household expenditures on snowmobiling during a typical year. For more details on the survey please refer to the Appendices.

Assumptions

During both the process of assembling the necessary snowmobile related input data and in conducting the economic impact analysis based on the resulting input data, several assumptions were made that affected the overall results.

- The survey was sent to a list of contacts provided by the OFSC, this list includes those who purchased at least one permit over the last five years. As such, some survey respondents may no longer be active in snowmobiling.
- The OFSC sold approximately 100,000 permits for Ontario trails in 2013-2014.
- The Insurance Bureau of Canada confirmed that 141,600 snow vehicles were insured in 2012, this is a decrease from 146,402 snow vehicles insured in 2004-2005.
- In consultation with the OFSC, the 2013-2014 season was conservatively defined as 3 months or 14 weeks long.
- No economic impacts were attributed to the purchase of snowmobiles beyond those purchased in 2013 or 2014.
- In consultation with the Ministry of Tourism, the following expenditures were attributed to the various Visitor Spending categories of the TRIEM model, as shown in the table below.

In addition to the approximately 100,000 permits issued to individual sleds in 2013-2014 an estimated 50,000 snowmobiles were used without permits for a total of 150,000 active sleds in Ontario in 2013-14. The survey showed an average of 1.9 sleds per household. From this it was estimated that for Ontario 78,000 households were involved in snowmobiling and average expenditures per household in the 2013-2014 from the survey were multiplied by 78,000 to get provincial estimates. In addition, Districts 9 and 6 were reviewed as it was estimated from the survey that 10% of trips took place in District 6 and 13% of trips took place in District 9. These percentages were used to estimate that 7,800 households visited District 6 and 10,140 households in visited District 9.

The survey produced an estimate of average expenditure by household. Some adjustments to results were made based on reasonable assumptions about expenditures per day and per category. In the case of fuel/oil and retail expenditures, median values were used instead of averages, to reflect a more conservative and probable estimate.

Economic Impact using TREIMS

The $853,263,840 in expenditure by snowmobilers in Ontario was allocated to the TREIMS input-output model[4] in the following manner, as shown in Table 29.

Table 29: Inputs of Expenditures by Snowmobilers in Ontario by TREIMS model category, 2013-2014 Season

Visitor Spending	Expenditure(s)
Travel Service	$43,229,940
Private Transportation- Operation	$241,800,000
Accommodation	$48,250,020
Food and Beverage- At Stores	$58,711,380
Food and Beverage- At Restaurants	$212,592,120
Recreation and Entertainment	$44,130,060
Retail- Clothing	$25,150,320
Retail- Other	$179,400,000
Total	**$853,263,840**

Using the above spending, the TREIM model produces estimates of impact on direct, indirect and induced GDP and employment, as well as total taxes. These results can be found in Table 30. The impact of snowmobiling in Ontario includes:

- GDP: $731,335,276
- Employment: 11,307 jobs
- Taxes: $332,781,171

The GDP refers to the value of goods and services produced by labour and capital located within the province. This GDP is measured at market prices. Tourism GDP refers to the GDP generated in those businesses that directly produce or provide goods and services for travelers. Employment refers to the number of jobs, including full-time, part-time, seasonal employment, as well as both employed and self-employed.

Direct impact refers to the impact generated in businesses or sectors that produce or provide goods and services directly to snowmobilers (accommodations, restaurants, recreations, etc.) Indirect impact refers to the impact resulting from the expansion of demand from businesses or sectors directly produce or provide goods and services to those active in snowmobiling in the province, to other businesses or sectors. Finally, induced impact refers to the impact associated with the re-spending of labour income and /or profits earned in the industries that serve the snowmobilers directly and indirectly.

[4] Available at: http://www.mtc.gov.on.ca/en/research/treim/treim.shtml

Table 30: Total Visitor Spending, GDP, Employment and Total Taxes

	2013-2014
GDP	
Direct	$369,416,786
Indirect	$190,294,197
Induced	$171,624,294
Total	$731,335,276
Employment (jobs)	
Direct	7,292
Indirect	2,157
Induced	1,859
Total	11,307
Total Taxes	
Federal	$185,482,693
Provincial	$144,991,055
Municipal	2,307,423
Total	$332,781,171

As shown in Table 31, snowmobiling in Ontario directly impacts a variety of industries. The direct GDP impact was found to be $369,416,786. The top four industries impacted by snowmobiling in Ontario, by direct GDP, in 2013-2014 were:

1. Other Transportation and Warehousing: $93,809,010
2. Food and Beverage Services: $64,907,262
3. Accommodation Services: $48,579,693
4. Retail Trade: $44,273,364

Table 31: Economic Impacts of Snowmobiling by Industry

Industry	Impact on Ontario 2014-2015	
	Direct GDP	Total GDP
Crop and Animal Production	$0	$3,760,719
Forestry, Fishing and Hunting	$0	$623,334
Mining and Oil and Gas Extraction	$0	$1,368,045
Utilities	$0	$9,316,533
Construction	$0	$21,599,751
Manufacturing	$0	$43,830,121
Wholesale Trade	$0	$28,936,437
Retail Trade	$44,273,364	$69,383,189
Other Transportation and Warehousing	$93,809,010	$119,488,152
Ground Passenger Transportation (excluding Rail)	$5,604,143	$7,501,213
Information and Cultural Industries	$4,712,970	$24,074,430
Other Finance, Insurance, Real Estate and Renting and Leasing	$0	$65,308,142
Car Renting and Leasing	$0	$2,016,130
Owner Occupied Housing	$0	$22,581,060
Professional, Scientific and Technical Services	$0	$26,023,766
Other Administration and Other Support Services	$0	$13,139,253
Travel Agencies	$24,987,150	$24,987,150
Education Services	$0	$872,696
Health Care and Social Assistance	$0	$5,915,570
Arts, Entertainment and Recreation	$19,089,944	$23,273,474
Accommodation Services	$48,579,693	$50,085,045
Food and Beverage Services	$64,907,262	$71,314,313
Other Services (except Public Administration)	$1,900,735	$10,679,725
Operating, Office, Cafeteria and Laboratory Supplies	$0	$0
Travel and Entertainment, Advertising and Promotions	$0	$0
Transportation Margins	$0	$0
Non-Profit Institutions Service Households	$1,246,773	$7,418,662
Government Sector	$1,480,827	$10,391,272
Net Indirect Taxes on Production	$0	$1,095,043
Total	**$369,416,786**	**$731,335,276**

Case Study- District 9

District 9 (Grey Bruce, Owen Sound) was reviewed separately from the province as a whole as a case study as it was ranked as the most commonly visited District by the survey respondents. The $100,023,796 in expenditure (using an estimate of11.7% of all Ontario trip expenditures taking place in District 9) by snowmobilers in District 9 was allocated to the TREIMS input-output model using the closest Ontario Tourism Regions expenditure pattern in the following manner, as shown in Table 32.

Table 32: Inputs of Expenditures by Snowmobilers in District 9 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$5,619,892
Private Transportation- Operation	$31,687,500
Accommodation	$6,272,502
Food and Beverage- At Stores	$7,632,479
Food and Beverage- At Restaurants	$27,636,975
Recreation and Entertainment	$5,736,975
Retail- Clothing	$3,269,541
Retail- Other	$12,168,000
Total	**$100,023,796**

Using the above spending, the TREIM model produces estimates of impact on direct, indirect and induced GDP and employment, as well as total taxes. These results can be found in Table 33. The impact of snowmobiling in District 9 includes:

- GDP: $65,862,075
- Employment: 1,111 jobs
- Taxes: $31,908,345

Table 33: Total Visitor Spending, GDP, Employment and Total Taxes, District 9

	2013-2014
GDP	
Direct	$43,636,122
Indirect	$11,570,300
Induced	$10,655,652
Total	$65,862,075
Employment (jobs)	
Direct	865
Indirect	138
Induced	108
Total	1,111
Total Taxes	
Federal	$17,865,387
Provincial	$13,813,144
Municipal	$229,815
Total	$31,908,345

Case Study- District 6

District 6 (Haliburton, Pembroke) was also used as a case study as one of the most commonly visited District for snowmobiling in the province. The $76,941,384 in expenditure (using an estimate of 9.0% of all Ontario trip expenditures taking place in District 6) by snowmobilers in District 6 was allocated to the TREIMS input-output model using the closest Ontario Tourism Regions expenditure pattern in the following manner, as shown in Table 34.

Table 34: Inputs of Expenditures by Snowmobilers in District 6 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$4,322,994
Private Transportation- Operation	$24,375,000
Accommodation	$4,825,002
Food and Beverage- At Stores	$5,871,138
Food and Beverage- At Restaurants	$21,259,212
Recreation and Entertainment	$4,413,006
Retail- Clothing	$2,515,032
Retail- Other	$9,360,000
Total	**$76,941,384**

Using the above spending, the TREIM model produces estimates of impact on direct, indirect and induced GDP and employment, as well as total taxes. These results can be found in Table 35. The impact of snowmobiling in District 6 includes:

- GDP: $51,618,691
- Employment: 867 jobs
- Taxes: $24,912,873

Table 35: Total Visitor Spending, GDP, Employment and Total Taxes

	2013-2014
GDP	
Direct	$33,618,691
Indirect	$9,405,175
Induced	$8,688,069
Total	$51,711,935
Employment (jobs)	
Direct	667
Indirect	110
Induced	89
Total	867
Total Taxes	
Federal	$13,957,855
Provincial	$10,798,230
Municipal	$156,788
Total	$24,912,873

Summary of Impact Assessment

The 2013-2014 Ontario snowmobile season had $853,263,840 in expenditures by snowmobilers riding in the province. Direct employment from the season's snowmobile expenditures resulted in employment comprising 7,292 equivalent full-year jobs. In addition snowmobiling in Ontario supported $274.8 M in total taxes among the three levels of governments, with the federal government receiving $185.5 million, provincial government $145 million and municipal governments across the province receiving $2.3 M.

Not all industries have been impacted equally. Other Transportation and Warehousing, Food and Beverage Services, Accommodation Services and Retail Trade benefited greatly from the snowmobiling activity in Ontario while other industries such as Utilities or Manufacturing did not see any direct impact on GDP.

Some areas in Ontario are likely to receive more benefits related to snowmobile expenditures, related riding patterns of snowmobilers across the province. According to the survey response, Districts 6 and 9 are among the most active Districts in terms of riding. From Table 36, the direct expenditures related to snowmobiling in District 6 and District 9 were $76,941,384 and $100,023,796, respectively. Direct employment from the season's snowmobile expenditures resulted in employment comprising 667 and 865 equivalent full-year jobs in District 6 and District 9, respectively. In addition snowmobiling in Ontario supported between $24 million and $32 million among the three levels of governments across the province for these two Districts alone.

Table 36: Economic Impact of Snowmobiling in Districts 6 and 9

	District 6	District 9
Direct Expenditures	$76,941,384	$100,023,796
Direct GDP	$33,618,691	$43,636,122
Direct Employment	667	865
Total Taxes	$24,912,873	$31,908,345

A comparison to previous study years (2004-2005 and 1996-1997 snowmobiling seasons) was completed and found below. It must be noted that a different, though related, assessment model was used for the two previous seasons and there many survey respondents indicated they were more active in snowmobiling this season. In general, there has been an increase in direct expenditures, direct GDP, direct employment and total taxes. There has been an increase in the market value of snowmobile related expenditures from $637.2 million to $853.3 million between 2004-2005 and 2013-2014. The number of direct jobs also increased by more than 2,000 jobs. The total economic activity also increased.

Table 37: Economic Impact of Snowmobiling Study Comparisons

	2013-2014	2004-2005[a]	1996-1997[b]
Direct Expenditures	$853,263,840	$637,218,785	$586 million
Direct GDP	$369,416,786	----	$322,604,014
Direct Employment	7,292 jobs	4,817 jobs	----
Total Taxes	$332,781,171	$274,865,668	----
Total Economic Activity	1.7 Billion [c]	$1.2 Billion	

a. Paula Neice and Associates, 2005

b. Ecologistics Limited, 1998

c. Using a multiplier of 2.0, as advised by Ministry of Tourism, Culture and Sport

Economic Impact by District

The tables below provide the economic impact of snowmobiling in Ontario during the 2013-2014 season. These assessments were done using the expenditure data provided by the survey results. The visitor spending for each District was calculated dividing the total spending by the province by the proportion of snowmobiling activity in the specific District according to the survey.

The TREIM model allows assessments to be completed at the Ministry's Travel Region Level. Districts were aligned as best as possible in accordance with the corresponding RTO, as shown the in Figure

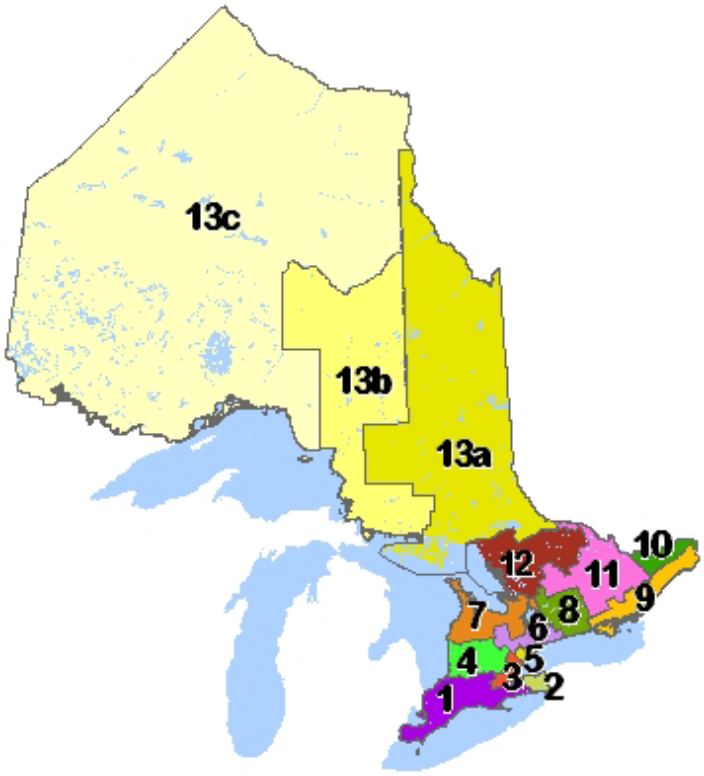

Figure 5: Ministry of Tourism, Culture and Sport Regions

District 1

Inputs of Expenditures by Snowmobilers in District 1 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$4,798,523.34
Private Transportation- Operation	$26,839,800.00
Accommodation	$5,355,752.22
Food and Beverage- At Stores	$6,516,963.18
Food and Beverage- At Restaurants	$23,597,725.32
Recreation and Entertainment	$4,898,436.66
Retail- Clothing	$2,791,685.52
Retail- Other	$19,913,400.00
Total	**$94,712,286.24**

Total Visitor Spending, GDP, Employment and Total Taxes, District 1

	2013-2014
GDP	
Direct	$33,475,310
Indirect	$11,743,931
Induced	$8,732,758
Total	$53,952,000
Employment (jobs)	
Direct	686
Indirect	127
Induced	87
Total	899
Total Taxes	
Federal	$14,920,181
Provincial	$12,289,550
Municipal	$169,968
Total	$27,379,699

District 2

Inputs of Expenditures by Snowmobilers in District 2 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$4,193,304.18
Private Transportation- Operation	$23,454,600.00
Accommodation	$4,680,251.94
Food and Beverage- At Stores	$5,695,003.86
Food and Beverage- At Restaurants	$20,621,435.64
Recreation and Entertainment	$4,280,615.82
Retail- Clothing	$2,439,581.04
Retail- Other	$17,401,800.00
Total	**$82,766,592.48**

Total Visitor Spending, GDP, Employment and Total Taxes, District 2

	2013-2014
GDP	
Direct	$29,024,851
Indirect	$8,520,625
Induced	$6,296,447
Total	$43,841,924
Employment (jobs)	
Direct	595
Indirect	95
Induced	64
Total	753
Total Taxes	
Federal	$12,380,622
Provincial	$10,208,155
Municipal	$128,335
Total	$22,717,112

District 3

Inputs of Expenditures by Snowmobilers in District 3 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$1,858,887.42
Private Transportation- Operation	$10,397,400.00
Accommodation	$2,074,750.86
Food and Beverage- At Stores	$2,524,589.34
Food and Beverage- At Restaurants	$9,141,461.16
Recreation and Entertainment	$1,897,592.58
Retail- Clothing	$1,081,463.76
Retail- Other	$7,714,200.00
Total	**$36,690,345.12**

Total Visitor Spending, GDP, Employment and Total Taxes, District 3

	2013-2014
GDP	
Direct	$12,861,992
Indirect	$4,209,885
Induced	$2,756,206
Total	$19,828,083
Employment (jobs)	
Direct	264
Indirect	46
Induced	27
Total	336
Total Taxes	
Federal	$5,561,344
Provincial	$4,582,170
Municipal	$56,325
Total	$10,199,838

District 4

Inputs of Expenditures by Snowmobilers in District 4 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$1,080,748.50
Private Transportation- Operation	$6,045,000.00
Accommodation	$1,206,250.50
Food and Beverage- At Stores	$1,467,784.50
Food and Beverage- At Restaurants	$5,314,803.00
Recreation and Entertainment	$1,103,251.50
Retail- Clothing	$628,758.00
Retail- Other	$4,485,000.00
Total	**$21,331,596.00**

Total Visitor Spending, GDP, Employment and Total Taxes, District 4

	2013-2014
GDP	
Direct	$7,516,263
Indirect	$2,951,221
Induced	$2,244,454
Total	$12,711,938
Employment (jobs)	
Direct	154
Indirect	32
Induced	23
Total	209
Total Taxes	
Federal	$3,472,496
Provincial	$2,857,820
Municipal	$39,599
Total	$6,369,915

District 5

Inputs of Expenditures by Snowmobilers in District 5 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$3,328,705.38
Private Transportation- Operation	$18,618,600.00
Accommodation	$3,715,251.54
Food and Beverage- At Stores	$4,520,776.26
Food and Beverage- At Restaurants	$16,369,593.24
Recreation and Entertainment	$3,398,014.62
Retail- Clothing	$1,936,574.54
Retail- Other	$13,813,800.00
Total	**$65,701,315.68**

Total Visitor Spending, GDP, Employment and Total Taxes, District 5

	2013-2014
GDP	
Direct	$23,051,866
Indirect	$7,691,357
Induced	$5,968,509
Total	$36,711,732
Employment (jobs)	
Direct	473
Indirect	86
Induced	62
Total	620
Total Taxes	
Federal	$10,208,368
Provincial	$8,407,084
Municipal	$124,362
Total	$18,739,814

District 6

Inputs of Expenditures by Snowmobilers in District 6 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$4,322,994
Private Transportation- Operation	$24,375,000
Accommodation	$4,825,002
Food and Beverage- At Stores	$5,871,138
Food and Beverage- At Restaurants	$21,259,212
Recreation and Entertainment	$4,413,006
Retail- Clothing	$2,515,032
Retail- Other	$9,360,000
Total	**$76,941,384**

Total Visitor Spending, GDP, Employment and Total Taxes, District 6

	2013-2014
GDP	
Direct	$33,618,691
Indirect	$9,405,175
Induced	$8,688,069
Total	$51,711,935
Employment (jobs)	
Direct	667
Indirect	110
Induced	89
Total	867
Total Taxes	
Federal	$13,957,855
Provincial	$10,798,230
Municipal	$156,788
Total	$24,912,873

District 7

Inputs of Expenditures by Snowmobilers in District 7 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$4,366,224
Private Transportation- Operation	$24,421,800
Accommodation	$4,873,252
Food and Beverage- At Stores	$5,929,849
Food and Beverage- At Restaurants	$21,471,804
Recreation and Entertainment	$4,457,136
Retail- Clothing	$2,540,182
Retail- Other	$18,119,400
Total	**$86,179,647**

Total Visitor Spending, GDP, Employment and Total Taxes, District 7

	2013-2014
GDP	
Direct	$30,170,041
Indirect	$8,845,829
Induced	$7,075,725
Total	$46,091,596
Employment (jobs)	
Direct	619
Indirect	100
Induced	75
Total	794
Total Taxes	
Federal	$12,990,770
Provincial	$10,704,336
Municipal	$113,789
Total	$23,808,895

District 8

Inputs of Expenditures by Snowmobilers in District 8 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$3,371,935.32
Private Transportation- Operation	$18,860,400.00
Accommodation	$3,763,501.56
Food and Beverage- At Stores	$4,579,487.64
Food and Beverage- At Restaurants	$16,582,185.36
Recreation and Entertainment	$3,442,144.68
Retail- Clothing	$1,961,724.96
Retail- Other	$13,993,200.00
Total	**$66,554,579.52**

Total Visitor Spending, GDP, Employment and Total Taxes, District 8

	2013-2014
GDP	
Direct	$23,329,437
Indirect	$7,035,670
Induced	$5,369,723
Total	$35,734,830
Employment (jobs)	
Direct	478
Indirect	79
Induced	55
Total	612
Total Taxes	
Federal	$10,051,851
Provincial	$8,286,393
Municipal	$114,119
Total	$18,452,363

District 9

Inputs of Expenditures by Snowmobilers in District 9 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$5,619,892
Private Transportation- Operation	$31,687,500
Accommodation	$6,272,502
Food and Beverage- At Stores	$7,632,479
Food and Beverage- At Restaurants	$27,636,975
Recreation and Entertainment	$5,736,975
Retail- Clothing	$3,269,541
Retail- Other	$12,168,000
Total	**$100,023,796**

Total Visitor Spending, GDP, Employment and Total Taxes, District 9

	2013-2014
GDP	
Direct	$43,636,122
Indirect	$11,570,300
Induced	$10,655,652
Total	$65,862,075
Employment (jobs)	
Direct	865
Indirect	138
Induced	108
Total	1,111
Total Taxes	
Federal	$17,865,387
Provincial	$13,813,144
Municipal	$229,815
Total	$31,908,345

District 10

Inputs of Expenditures by Snowmobilers in District 10 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$2,377,646.70
Private Transportation- Operation	$13,299,000.00
Accommodation	$2,653,751.10
Food and Beverage- At Stores	$3,229,125.90
Food and Beverage- At Restaurants	$11,692,566.60
Recreation and Entertainment	$2,427,153.30
Retail- Clothing	$1,383,267.60
Retail- Other	$9,867,000.00
Total	**$46,929,511.20**

Total Visitor Spending, GDP, Employment and Total Taxes, District 10

	2013-2014
GDP	
Direct	$16,429,229
Indirect	$4,817,035
Induced	$3,853,127
Total	$25,099,392
Employment (jobs)	
Direct	337
Indirect	55
Induced	41
Total	432
Total Taxes	
Federal	$7,074,211
Provincial	$5,829,094
Municipal	$61,964
Total	$12,965,269

District 11

Inputs of Expenditures by Snowmobilers in District 11 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$2,809,946
Private Transportation- Operation	$15,717,000.00
Accommodation	$3,136,251.30
Food and Beverage- At Stores	$3,816,239.70
Food and Beverage- At Restaurants	$13,818,487.80
Recreation and Entertainment	$2,868,453.90
Retail- Clothing	$1,634,770.80
Retail- Other	$11,661,000.00
Total	**$55,462,149.60**

Total Visitor Spending, GDP, Employment and Total Taxes, District 11

	2013-2014
GDP	
Direct	$18,875,222
Indirect	$5,838,428
Induced	$4,714,384
Total	$29,428,034
Employment (jobs)	
Direct	390
Indirect	65
Induced	49
Total	509
Total Taxes	
Federal	$8,252,239
Provincial	$6,782,532
Municipal	$91,806
Total	$15,126,577

District 12

Inputs of Expenditures by Snowmobilers in District 12 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$2,291,186.82
Private Transportation- Operation	$12,815,400.00
Accommodation	$2,557,251.06
Food and Beverage- At Stores	$3,111,703.14
Food and Beverage- At Restaurants	$11,267,382.36
Recreation and Entertainment	$2,338,893.18
Retail- Clothing	$1,332,966.96
Retail- Other	$9,508,200.00
Total	**$45,222,983,52**

Total Visitor Spending, GDP, Employment and Total Taxes, District 12

	2013-2014
GDP	
Direct	$15,816,278
Indirect	$5,123,031
Induced	$3,994,071
Total	$24,933,380
Employment (jobs)	
Direct	325
Indirect	57
Induced	42
Total	424
Total Taxes	
Federal	$6,958,055
Provincial	$5,730,764
Municipal	$78,095
Total	$12,766,914

District 13

Inputs of Expenditures by Snowmobilers in District 13 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$1,123,978.44
Private Transportation- Operation	$6,286,800.00
Accommodation	$1,254,500.52
Food and Beverage- At Stores	$1,526,495.88
Food and Beverage- At Restaurants	$5,527,395.12
Recreation and Entertainment	$1,147,381.56
Retail- Clothing	$563,908.32
Retail- Other	$4,664,400.00
Total	**$22,184,859.84**

Total Visitor Spending, GDP, Employment and Total Taxes, District 13

	2013-2014
GDP	
Direct	$7,763,243
Indirect	$2,356,050
Induced	$1,862,785
Total	$11,982,078
Employment (jobs)	
Direct	159
Indirect	27
Induced	19
Total	206
Total Taxes	
Federal	$3,367,157
Provincial	$2,773,804
Municipal	$31,139
Total	$6,172,100

District 14

Inputs of Expenditures by Snowmobilers in District 14 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$994,288.62
Private Transportation- Operation	$5,561,400.00
Accommodation	$1,109,750.46
Food and Beverage- At Stores	$1,135,361.74
Food and Beverage- At Restaurants	$4,886,618.76
Recreation and Entertainment	$1,014,991.38
Retail- Clothing	$578,457.36
Retail- Other	$4,126,200.00
Total	**$19,625,068.32**

Total Visitor Spending, GDP, Employment and Total Taxes, District 14

	2013-2014
GDP	
Direct	$6,863,625
Indirect	$2,223,159
Induced	$1,733,263
Total	$10,820,47
Employment (jobs)	
Direct	141
Indirect	25
Induced	18
Total	184
Total Taxes	
Federal	$3,019,517
Provincial	$2,486,915
Municipal	$33,890
Total	$5,540,321

District 15

Inputs of Expenditures by Snowmobilers in District 15 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$518,759.28
Private Transportation- Operation	$2,901,600.00
Accommodation	$579,00.24
Food and Beverage- At Stores	$704,536.56
Food and Beverage- At Restaurants	$2,551,105.44
Recreation and Entertainment	$529,560.72
Retail- Clothing	$301,803.84
Retail- Other	$2,152,800.00
Total	**$10,239,166.08**

Total Visitor Spending, GDP, Employment and Total Taxes, District 15

	2013-2014
GDP	
Direct	$3,574,332
Indirect	$1,106,702
Induced	$718,394
Total	$5,399,428
Employment (jobs)	
Direct	73
Indirect	12
Induced	8
Total	93
Total Taxes	
Federal	$1,526,951
Provincial	$1,256,557
Municipal	$13,642
Total	$2,797,150

District 17

Inputs of Expenditures by Snowmobilers in District 17 by TREIMS model category

Visitor Spending	Expenditure(s)
Travel Service	$821,368.86
Private Transportation- Operation	$4,567,200.00
Accommodation	$916,750.38
Food and Beverage- At Stores	$1,115,516.22
Food and Beverage- At Restaurants	$4,039,250.28
Recreation and Entertainment	$838,471.14
Retail- Clothing	$477,856.08
Retail- Other	$3,408,600.00
Total	**$16,212,012.96**

Total Visitor Spending, GDP, Employment and Total Taxes, District 17

	2013-2014
GDP	
Direct	5659360
Indirect	1752279
Induced	1138457
Total	8549096
Employment (jobs)	
Direct	116
Indirect	20
Induced	12
Total	148
Total Taxes	
Federal	241671
Provincial	1989549
Municipal	21599
Total	4428820

Appendices

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Key Informant Interview Guide

Thank you for taking time to speak with me today. As you may know the Ontario Federation of Snowmobile Clubs has hired Harry Cummings and Associates, as an independent consulting firm, to study the economic impact of snowmobiling in Ontario as an update to a study completed in 2005.

Your input is very important to us and we hope you will take some time to answer the questions. Your information remains confidential. You may choose to skip any question.

1. How long have you been snowmobiling? Who else in your household sleds with you?
2. What machines do you have (brand, series)? Do you tow and how do you do that (trailer, truck etc.)?
3. Where did you snowmobile this winter?
4. How often? About how many days were you snowmobiling this year?
5. How did this compare to other years? If your snowmobiling activity was significantly different this year compared to other years, what factors contributed to this change?
6. Do you have a cottage or particular destination away from home you visit each year for snowmobiling?
7. Any particular positive experiences this year?
8. Any particular negative experiences this year?
9. Where do you purchase your snowmobiling equipment (store, community)?
10. Where do you purchase your clothing (including boots, helmets, etc.)?
11. Typically where do you have maintenance done? Purchase parts?
12. Do you do overnight trips? If so, where do you stay? Do you eat in restaurants Or buy food and cook?
13. Which businesses do you believe benefits the most from snowmobiling in your community?
14. Accommodation and related?
15. Dealers?
16. Maintenance?
17. Other retailers?
18. How does the community as a whole benefit from snowmobiling related activities?
19. Are there any particular issues with snowmobiling we should be aware of?
20. Are there any particular trends in snowmobiling?
21. In what year were you born?
22. What is the highest level of education you have completed?
23. Are you currently working full time, part time, retired, or a student?
24. Which income category does your total household (before taxes) fall into?

    a. Under $5,000
    b. 5,000 to $9,999
    c. $10,000 to $14,999
    d. $15,000 to $19,999
    e. $20,000 to $29,999
    f. $30,000 to $39,999
    g. $40,000 to $49,999
    h. $50,000 to $59,999
    i. $60,000 to $79,999
    j. $80,000 to $99,999
    k. $100,000 to $124,999
    l. $125,000 to $149,999

m. $150,000 and over
n. Prefer not to answer

25. Gender.