

2019

Snowmobile Economic Impact Study



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Executive Summary

Introduction

The **New Brunswick Federation of Snowmobile Clubs** (NBFSC) oversees the securement, development, winter maintenance, and management of snowmobile trails in New Brunswick. The extent and quality of the snowmobile network has grown substantially over the years. This report shows the activities, choices and spending of snowmobilers so the report can be used in future years to measure changes in activity, economic impacts, and to support specific investments in New Brunswick’s winter tourism.



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In 2019, the NBFSC utilized a combination of on-line surveys, provincial trail counters and the individual data from the purchasers of the 2018 NBFSC Trail Permit sales to residents and tourists. The real, unquestionable and verifiable results will allow us to produce accurate return on investment ratios not previously available from the provincial Government at Tourism, Heritage and Culture.

Results

The annual \$90 million worth of economic and volunteer value of snowmobile development includes:

GDP: \$27.7 million in added-value GDP from snowmobile tourism¹.

\$33.4 million in added-value GDP from resident snowmobiling

Sub-total: **\$61.1 million**

\$21.7 million in volunteer contributions

Total: **\$82.8 million**

SPENDING: \$29.4 million spending from snowmobile tourism

\$39.4 million spending for snowmobile gear

Sub-total: **\$68.8 million**

\$21.7 million in volunteer contributions

Total: **\$90.5 million**

¹ *Intra- and inter-provincial tourism is included; added-value is gross-domestic product (GDP).*

Approach

This report is based on information for 1,137 snowmobilers of 2,062 invited to participate in an online survey (55% response rate). The results provide estimates of participation, volunteering, spending, and trail preferences for the total population of New Brunswick snowmobile permit holders (19,100) during the December 15th, 2017 to April 15th, 2018 season. Results are divided according to New Brunswick residents and visitors (out-of-province), while resident results are further divided between “local” and “distant” trail users to help assess the tourism-related value.

Outcomes

- ❄️ **Snowmobiler origin** – Over half (53%) are New Brunswick residents using nearby trails as their main destination, followed by residents travelling about 144 kms (35%) to reach trails, and 14% are out-of-province visitors.
- ❄️ **Trip planning** – A clear majority (82%) of out-of-province visitors plan their snowmobiling activities before they come to New Brunswick. Amongst all snowmobilers, the website most frequently used (88%) is the NBFSC site, followed by the provincial tourism website (8%).
- ❄️ **Trip days** – The total estimated trip days for all snowmobilers is 219,200. About 23% are in Zone 3 (Bathurst – Caraquet), followed by 15% in Zone 5 (Doaktown – Miramichi) and 14% in Zone 4 Southern Victoria and Carleton Counties.
- ❄️ **Trip spending** – The total spending is **\$29.4 million** and the majority is for transportation (41%), followed by food (26%), and accommodation (19%). Visitors to the province account for 12% (\$3.5 million).
- ❄️ **Equipment and gear spending** – About **\$143 million** in total includes (70%) spent on snowmobiles, followed by trailers (11%), and the average spending per snowmobiler is about \$7,500 per year.
- ❄️ **Volunteering** – A total of **1.2 million volunteer hours** by all snowmobilers includes 53% for trail maintenance and 13% for administration. At a rate of \$18 per hour this represents over \$21 million in value.
- ❄️ **In-kind donations** – One-third (33%) of all snowmobilers make at least one in-kind personal or business contribution to snowmobile trail development.
- ❄️ **Trail satisfaction** – The overall satisfaction is very high with 80% giving a rating from 8 to 10 on a 10-point scale. Groomed trails for snowmobiles earned the highest satisfaction (86% rate this 8 to 10), while 46% give a high rating (8 to 10) for wilderness trails.
- ❄️ **Trail counters** – Counters on twelve trails captured about 19% of the trips reported in the survey, and the highest counts were on Trail 17 Moose Valley (7,446), Trail 22 Island Lake (5,689), and Trail 19 Bathurst (5,316).

Economic Impacts

Trip Spending

The spending on snowmobile rentals, accommodation, transport, food, recreation, and retail items produces the following economic impacts in New Brunswick:

- ❄ The added-value GDP: gross domestic product) to the New Brunswick economy is about \$24.7 million;
- ❄ The income (wages and salaries) earned in the province totals \$14.5 million;
- ❄ About 598 full-time equivalent (FTE) jobs are gained in the province; and
- ❄ The federal and provincial taxes generated within New Brunswick are \$2.4 and \$2.9 million respectively.



Economic impacts of snowmobile trip spending

(\$000s)	Direct	Indirect	Induced	Total NB	Total Canada
Output	29,368	8,794	6,272	44,434	60,424
GDP	16,122	4,762	3,833	24,717	32,431
Income	10,328	2,668	1,512	14,508	18,883
Employment¹	491	63	44	598	688
Federal Tax²	1,204	302	1,081	2,407	2,846
Provincial Tax²	1,506	389	977	2,873	3,477
Municipal tax	103	13	49	165	387

Source: Statistics Canada interprovincial economic impact model, 2014.

1. Employment is full-time equivalents. 2. Taxes exclude personal income taxes and corporate taxes.



Equipment and gear spending

The spending on snowmobiles, trailers, clothing, accessories, and buildings results in:

- ❄ Added-value (GDP) to the New Brunswick economy of about \$36.4 million;
- ❄ Income (wages and salaries) earned in the province totaling \$22.8 million;
- ❄ About 579 full-time equivalent (FTE) jobs are gained in the province; and
- ❄ The federal and provincial taxes generated within New Brunswick are \$3.5 and \$4.1 million respectively.

Economic impacts of snowmobile equipment and gear spending

(\$000s)	Direct	Indirect	Induced	Total NB	Total Canada
Output	39,368	11,447	9,800	60,615	79,012
GDP	24,046	6,356	5,990	36,392	46,136
Income	16,900	3,550	2,363	22,813	28,454
Employment¹	427	82	69	579	693
Federal Tax²	1,404	371	11,720	3,495	4,066
Provincial Tax²	2,099	441	1,514	4,053	4,809
Municipal tax	130	25	66	221	519

Source: Statistics Canada interprovincial economic impact model, 2014.

1. Employment is full-time equivalents. 2. Taxes exclude personal income taxes and corporate taxes.

Summary impacts

The economic impacts can be expressed in terms of contributions from New Brunswick resident, visitors to the province, and volunteers:

- ❄ **New Brunswick residents** - spend \$98 million that adds \$57 million in value (GDP) to the economy including \$35 million in wages and salaries for 1,084 full-time equivalent employees.
- ❄ **Visitors to the province** - spend \$7.5 million that adds \$4.3 million in value (GDP) to the economy including \$2.6 million in wages and salaries for 92 full-time equivalent employees.
- ❄ **Volunteer contributions** - the network of NBFSC affiliated snowmobile clubs contribute 1.2 million hours of their time that is worth over \$21 million, as well as in-kind donations of equipment, vehicles, land and buildings that are not valued here. The economic impacts totaling \$61 million in added-value (GDP) to the New Brunswick economy would not be possible without this volunteer base.



Final Report

New Brunswick Snowmobile Trails Economic Impact Report

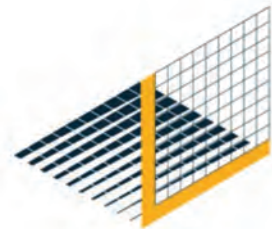
Submitted to:



**New Brunswick Federation
of Snowmobile Clubs**

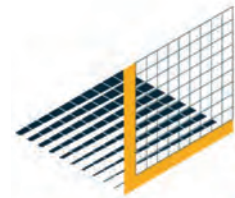
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1. Introduction

1.1 Background

The New Brunswick Federation of Snowmobile Clubs (NBFSC) oversees the development and management of trails used for snowmobiling across the province. The extent and quality of the snowmobile network has grown substantially over the years. Snowmobiling has generated tourism activity within the province as well as tourist visitation from outside the province.

This report provides economic impact results for NBFSC that are consistent with the methods and expectations of New Brunswick Tourism, Heritage and Culture (NBTHC). The report contains data of interest to snowmobile clubs, snowmobile and equipment dealers, tourism operators, local and provincial government, and the public.

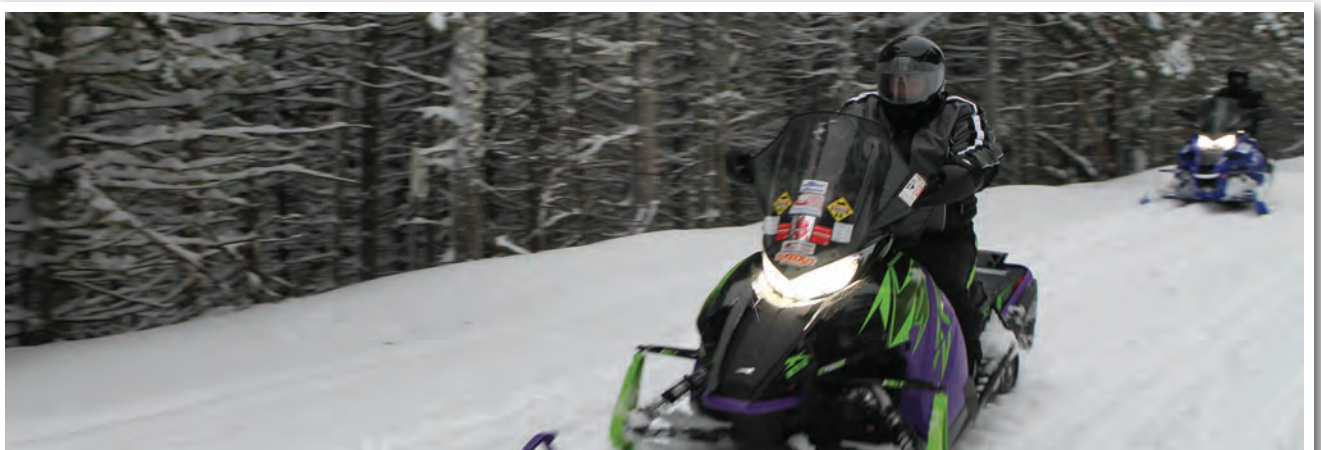


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1.2 Goal and Objectives

The goal is to complete an economic impact report of snowmobilers using the trail network in New Brunswick. The study will be usable in future years to measure changes in activity and economic impact, and to examine “signature” trails as specific investments and promotions are undertaken. More specifically, the study must include the following:

- ❄️ **Design and implement** surveys to gather snowmobile trail user information;
- ❄️ **Provide conventional economic measures** of direct, indirect, and induced impacts including: output, gross domestic product (added-value), jobs, incomes, and tax revenues generated to governments; and
- ❄️ **Show provincial impacts** for each economic measure.



2. Approach

2.1 Scope

This report examines the total population of New Brunswick snowmobile permit holders (19,100) during the 2018 season. The results only include their activities in New Brunswick and their spending in the province. Results are divided according to New Brunswick residents and visitors (out-of province), and resident results are further divided between “local” and “distant” trail users to help assess the tourism-related value of snowmobile activities.

2.2 Survey design and implementation

The approach to survey design and selection of questions is based on previous surveys conducted by Gardner Pinfold, by Parks Canada Agency, and Statistics Canada. The approach is also informed by input from the NBFSC. The core survey questions regarding trip characteristics and spending categories adhere to Statistics Canada travel survey questions and methods (i.e. National Travel Survey and International Travel Survey). Additional questions of interest to NBFSC regarding snowmobiler views and preferences for trail experiences were included. The survey questions are shown in the Appendix.

The NBFSC maintains a database of all 2017-2018 permit holders (19,100) that includes individuals willing to be contacted (5,050) by the Federation for trail development purposes. There were 2,747 with emails provided, but some were no longer valid and 2,062 emails became the list used for the survey. The survey was delivered entirely online and was secured so that only those invited were able to complete the survey once.



The survey was delivered in the winter of 2019 with the survey remaining open for at least two months to allow as many people to participate as possible. Initial invitations were followed-up with three reminders to improve response rates.

The survey did not require answers to be filled in for all questions, and participants could opt-out of any question they did not want to answer. The survey was long so some respondent fatigue was evident in the last group of questions regarding trail improvement preferences (64% of all survey respondents completed the full survey).

2.3 Economic analysis

The approach to economic impact analysis is expenditure-driven and relies on NBFSC information, input from representatives of snowmobile clubs, and surveys of snowmobile permit holders in 2018.

The next step is to flow the measures of output through an economic input-output model. The Statistics Canada 2015 input-output model is the basis for all economic impact calculations. Economic impacts within each province as well as impacts to Canada as a whole are produced from the Statistics Canada model. The output estimates are flowed through the appropriate industries and commodities.

Impacts are quantified using conventional economic indicators consistent with the national income accounting framework. Economic impact is measured with these key indicators:

- ❄️ **Gross value of output:** Economic impact arises as industry expenditures work their way through the economy. Company spending on inputs becomes the revenue of many another companies, which they in turn spend on inputs for the goods and services they produce, and so on. Gross value of output, then, is the cumulative sum of these sales and purchases of intermediate and final goods and services. These transactions occur in the province, and also spill over to other provinces where supply and service industries may be located.
- ❄️ **GDP:** An industry's contribution to Gross Domestic Product represents its broadest measure of economic impact. The domestic product of an industry captures the value it adds to purchased inputs through the application of labour and capital. GDP represents the sum of the value added by each industry. Value added should not be confused with sales value, since the latter would include the value of purchased inputs.
- ❄️ **Employment:** Industry employment is important politically because of the significance generally attached to jobs, but from an economic impact perspective, the significance lies in the economic impact generated through the spending of employment income. The greater the employment and higher the average income, the more significant the industry in terms of economic impact.
- ❄️ **Income:** This captures the payments to households in the form of wages and salaries earned in the impacted industries. Returns to labour in the form of wages and salaries form a key component of GDP. Industries paying relatively high average wages and salaries generate a correspondingly higher economic impact than industries paying lower average incomes.
- ❄️ **Taxes:** The model captures federal and provincial taxes on products and production, but not personal income taxes. Corporate taxes are also not included.

Economic impacts are generated through direct, indirect and induced demand in the economy expressed in terms of industry and consumer purchases of goods and services. The sum of indirect and induced impacts is often referred to as the “spin-off” impact.

❄️ **Direct impact:** refers to impact arising from the expenditures made by firms in the subject industries on the goods and services needed to produce industry outputs. For example, the accommodation sector operators buy furnishings from manufacturers; retail service stations buy fuel from refineries; the food services sector buy foods from wholesalers.

❄️ **Spin-off impact:** the sum of indirect and induced impacts. Indirect impact refers to the impacts generated as direct demand triggers a range of inter-industry purchases. For example, boat builders buy components from manufacturers; refineries buy services from maintenance contractors; catering companies buy basic food products. These industries in turn buy more basic goods and services, and so on. Induced impact refers to the demand created in the broader economy through consumer spending of incomes earned by those employed in direct and indirect activities.

3. Results

3.1 Survey respondents

In 2018 there were 19,100 snowmobile permit holders of which 5,050 agreed to receive correspondence from NBFSC. To conduct the online survey, 2,747 email addresses provided by these permit holders were checked for duplicates and bounce-backs, and 2,062 email addresses were confirmed as valid contacts. The survey was distributed to these contacts and the following table shows the number of respondents (569) to the survey.

The respondents answered the survey on behalf of the permit holders in their household so respondent counts are broken down according to the number of permit holders in their household. The majority of households have one permit holder (55%), then 35% have two permit holders, and 10% have 3 or more permit holders in their household.



Table 1. Number of households with 1 to 5 or more permit holders, 2018

	1 permit	2	3	4	5+	Total
NB over 30 km	89	74	13	5	3	184
NB under 30 km	168	109	19	3	10	309
NS	28	9	-	-	2	39
PEI	14	3	-	-	1	18
CAN Other	5	4	-	-	-	9
USA	7	2	-	-	1	10
Total	311	201	32	8	17	569
Percent	55%	35%	6%	1%	3%	100%

The total number of permit holders represented in the survey is 1,137 and this is the basis for determining the response rate. Using the 2,062 as the potential respondents, the survey reached 55% of this total. This is considered an excellent level of participation in the survey. The 1,137 permit holders are broken down by age group in the table below, and the largest group (38%) is 50-69, followed by the 35-49 age group (34%), then the 19-34 age group (16%).

Table 2. Number of permit holders by age group, 2018

	Under 19	19-34	35-49	50-69	Over 69	Total
NB over 30 km	-	2	3	13	-	18
NB under 30 km	33	77	126	153	5	394
NS	60	94	221	204	27	606
PEI	5	9	20	38	1	73
CAN Other	1	4	16	11	-	32
USA	-	-	3	8	3	14
Total	99	186	389	427	36	1137
Percent	9%	16%	34%	38%	3%	100%

Provincial tourism efforts aim to attract snowmobilers from outside the province as well as promoting snowmobile tourism within the province. Historically the distance of travel from home (over 30 kms) was used to identify within-province tourism and this is used here even though modern definitions of tourism are more flexible (e.g. travel outside normal environment).

The majority of snowmobilers (55%) use nearby trails as their main snowmobile destination, followed by New Brunswick residents travelling an average of 144 kms (33%), and 12% are visitors from other provinces. A comparison with the snowmobile permit database shows that the survey slightly over-sampled New Brunswick residents (3% more), while the survey under-sampled Nova Scotians (3% less), and this would likely lead to conservative spending estimates.

Table 3. Snowmobiler statistics by origin, 2018

	Snowmobilers	Distance ¹	Snowmobiles ²	Days ³	Nights ³
NB over 30 km	33%	144	1.9	18.6	5.0
NB under 30 km	55%	6	2.0	15.5	3.4
NS	6%	452	2.1	9.3	7.8
PEI	3%	334	2.1	9.2	5.4
CAN Other	1%	794	2.8	19.2	4.1
USA	2%	513	2.2	5.9	1.6
Average	100%	119	2.0	19.4	4.3

1. New Brunswick residents were asked how far they travel to their main snowmobile destination in the province; 2. Average number of snowmobiles per household of respondents; 3. Number of days and nights are per snowmobile permit holder.

3.2 Visitor statistics

According to Statistics Canada trip purpose categories for tourism, nearly all (94%) of visiting snowmobilers from other provinces are in New Brunswick for a pleasure holiday, and a few (6%) are visiting friends and family while on a trip that involves snowmobiling.

Table 4. Out-of-province visitors main purpose of trip, 2018

	Pleasure holiday	Visiting friends or relatives	Business or work related	Other	Total
NS	48%	5%	-	-	-
PEI	22%	-	-	-	22%
CAN Other	12%	-	-	-	12%
USA	12%	1%	-	-	13%
Total	94%	6%	-	-	100%

A clear majority (82%) of out-of-province visitors plan their snowmobiling activities before they come to New Brunswick. Some chose their snowmobiling destinations “by chance” (12%), and the remaining 6% make plans once they are in New Brunswick.

Table 5. Out-of-province visitors trip planning, 2018

	Before NB	After NB	Tour	Chance	Total
NS	46%	3%	-	5%	54%
PEI	18%	-	-	5%	23%
CAN Other	9%	2%	-	-	11%
USA	9%	2%	-	3%	14%
Total	82%	6%	-	12%	100%

3.3 Trip planning resources

Amongst all snowmobilers, the website most frequently used (88%) is the NBFSC site, followed by the provincial tourism website (8%).

Table 6. All snowmobilers use of websites for trip planning, 2018

	NBFSC	Province of NB Tourism	Northern Odyssey	Sledmagazine.com	Total
NB Distant	30%	4%	1%	1%	36%
NB Local	47%	4%	1%	1%	53%
NS	7%	-	-	-	7%
PEI	2%	-	-	-	2%
CAN Other	1%	-	-	-	1%
USA	1%	-	-	-	1%
Total	88%	8%	2%	2%	100%

The largest share of all snowmobilers (34%) use the NBFSC paper map, followed by 23% for both the NBFSC interactive map (online) and the Iphone App.

Table 7. All snowmobilers use of NBFSC resources for trip planning, 2018

	NBFSC Interactive Map	NBFSC Provincial (paper) Map	NBFSC TrakMaps (GPS)	NBFSC Android App	NBFSC iPhone App	Total
NB Distant	8%	12%	4%	4%	8%	36%
NB Local	10%	16%	4%	5%	13%	48%
NS	2%	4%	1%	-	1%	8%
PEI	1%	1%	1%	-	1%	4%
CAN Other	1%	1%	-	-	-	2%
USA	1%	1%	-	-	-	2%
Total	23%	34%	10%	10%	23%	100%

All percentages are rounded.

3.4 Provincial snowmobile zones

NBFSC identifies eight (8) zones for snowmobiling in the province (below). Snowmobilers were asked how many days they snowmobile in the province and what portion is spent in each of these zones.

- **Zone 1:** Edmundston – Perth-Andover (Madawaska & Northern Victoria Counties)
- **Zone 2:** Saint-Quentin - Campbellton - Charlo (Restigouche County)
- **Zone 3:** Bathurst - Caraquet - Acadian Peninsula (Gloucester County)
- **Zone 4:** Florenceville-Bristol - Woodstock - Fredericton (Southern Victoria and Carleton Counties)
- **Zone 5:** Doaktown - Miramichi area (Northumberland County)
- **Zone 6:** Saint-Louis de Kent - Sackville (Kent and Westmorland Counties)
- **Zone 7:** Fredericton - Saint John (Charlotte County)
- **Zone 8:** Sussex - Alma - Riverview (Fundy Coast)

The total estimated trip days for all snowmobilers in New Brunswick is 219,200. Almost one quarter (24%) are in Zone 3, followed by 15% in Zone 5 and 14% in Zone 4.

Table 8. Snowmobiling days in each zone by origin of snowmobiler, 2018.

(000s)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
NB Distant	10.9	9.9	21.8	7.6	11.9	3.4	10.7	7.4	83.7
NB Local	10.4	8.9	21.0	21.3	17.9	9.9	16.8	12.4	118.8
NS	0.5	1.0	3.0	1.1	1.4	0.1	0.3	0.7	8.1
PEI	0.2	0.7	2.0	0.1	0.5	-	-	-	3.5
Can Other	0.2	-	0.9	0.5	0.8	-	0.7	-	3.2
USA	0.5	0.1	1.2	-	0.1	-	0.1	0.1	2.0
Total	22.8	20.7	49.9	30.5	32.6	13.5	28.6	20.6	219.2
Percent	10%	9%	24%	14%	15%	6%	13%	9%	100%

3.5 Snowmobile trip spending

Survey respondents indicated their snowmobile trip spending according to Statistics Canada travel survey spending categories and one added category for snowmobile rental. The spending totals for survey respondents were applied to the total number of permit holders to estimate total spending for 2018 (table below). The total spending is \$29.4 million and the majority is for transportation (41%), followed by food (26%), and accommodation (19%). Visitors to the province account for 12%; a total of \$3.5 million.

Table 9. Snowmobiling trip spending by category and origin of snowmobiler, 2018

	Rental	Accomm.	Transport	Food	Recreation	Other	Total
NB Distant	86	2,072	4,655	2,916	896	2165	10,841
NB Local	1,408	2,390	6,189	3,788	1,225	375	15,015
NS	14	681	766	521	143	49	15,015
PEI	-	313	238	225	38	28	841
Can Other	-	100	56	53	7	3	220
USA	14	95	72	86	8	5	279
Total	1,161	5,651	11,975	7,590	2,316	674	29,368
Percent	4%	19%	41%	26%	8%	2%	100%
\$ per day	5.30	25.78	54.64	34.63	10.57	3.08	134.00

Using the number of days spent in each provincial snowmobile zone as a basis for distributing the spending of each snowmobiler, the following table shows spending and daily spending rates by zone. The largest share of spending (26%) is in Zone 3, followed by 16% in Zone 5, and 13% in Zone 7. The provincial average daily spending rate is \$134 per day, and the spending rate ranges from a low of \$112 in Zone 4 to a high of \$144 in Zone 3.

Table 10. Snowmobiling trip spending in each zone by origin of snowmobiler, 2018.

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
NB Distant	1,407	1,301	2,945	646	1,611	558	1,326	1,047	10,841
NB Local	1,330	1,157	2,577	2,652	2,507	967	2,239	1,586	15,015
NS	151	242	1,118	84	438	54	50	34	2,173
PEI	65	158	461	33	112	11	-	-	841
Can Other	54	-	66	-	11	-	89	-	220
USA	196	70	14	-	-	-	-	-	279
Total	3,204	2,928	7,181	3,416	4,679	1,590	3,704	2,667	29,368
Percent	11%	10%	24%	12%	16%	5%	13%	9%	100%
\$ per day	141	142	144	112	143	118	129	129	134

3.6 Snowmobiler spending on equipment and gear

Survey respondents estimated their annual spending in New Brunswick on gear according to six (6) spending categories including “other” snowmobile related purchases. The main findings are as follows:

- ❄ The total spending amounts to \$143 million;
- ❄ Snowmobilers using local trails account for 57% of the total, 39% is by those travelling to more distant trails in the province, and 4% is purchases made in New Brunswick by visitors from outside the province;
- ❄ The clear majority (70%) is spent on snowmobiles, then trailers are the next biggest item (11%); and
- ❄ The average spending per person is \$7,500 per year.



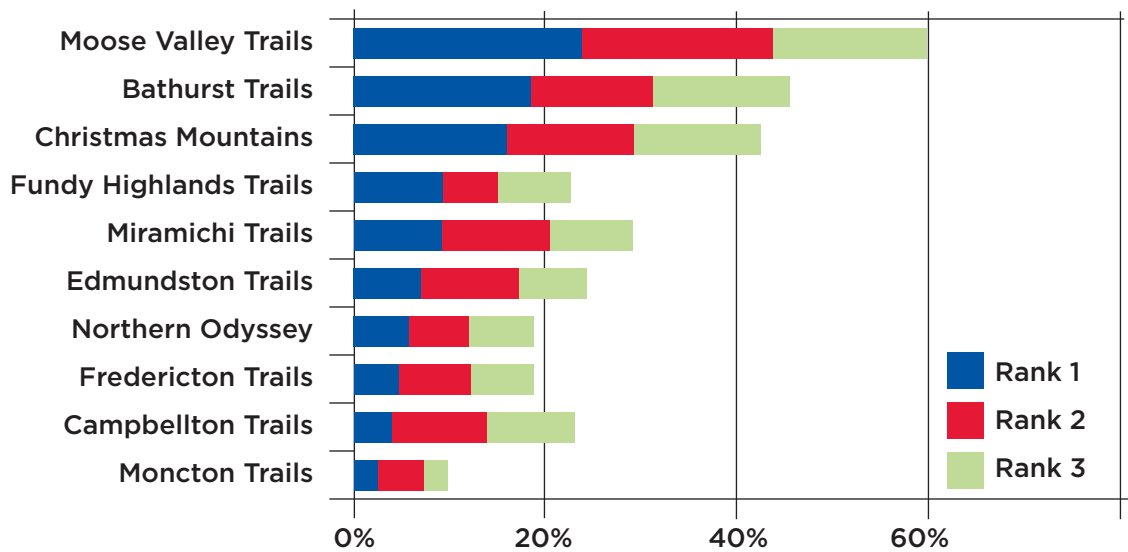
Table 11. Snowmobiling spending on equipment and gear, by origin of snowmobiler

(\$000s)	Snowmobiles	Trailers	Clothing	Accessories	Buildings	Other	Total
NB Distant	30,098	8,097	3,042	2,337	3,628	287	56,490
NB Local	58,752	6,666	3,854	2,438	9,703	433	81,846
NS	2,669	1,480	252	282	-	15	4,698
PEI	284	-	19	22	-	39	364
Can Other	-	-	33	13	-	-	46
USA	-	-	14	17	-	-	31
Total	100,803	16,243	7,215	5,108	13,331	774	143,474
Percent	70%	11%	5%	4%	9%	1%	100%

3.7 Ranking of trails for an “all expenses paid trip”

Survey respondents were asked to rank their top three picks from ten trails where they could enjoy an all expenses paid three-day guided trip with another guest snowmobiler (Figure 1 below). The top three are the Moose Valley, Bathurst, and Christmas Mountain trails for attracting the most number one rankings (first choice), as well as the highest combined first, second, and third rankings. Miramichi, Edmundston, and Campbellton trails attracted strong second and third rank choices despite lower first rankings.

Figure 1. Ranking of trails for an “all expenses paid trip”



3.8 Information sources used for trip planning

Survey respondents were asked which information sources they use to plan their snowmobile trips in New Brunswick and the list included:

- Four (4) snowmobile shows;
- Seven (7) magazines;
- Four (4) social media platforms;
- Six (6) accommodations sources; and
- Four (4) traditional media sources.

The first observation is that most individuals use more than one source (see table below). For instance, 12% use two sources, 15% use three sources and so on. Nearly one-third (31%) use at least five sources, and nearly two-thirds (62%) use at least three sources. Some snowmobilers don’t use any information sources (17%).

Table 12. The percentage of individuals according to the number of information sources they use for trip planning.

No. of sources	0	1	2	3	4	5	>5	TOTAL
CAN Other	-	-	-	-	1%	-	-	1%
NB Distant	3%	2%	5%	6%	4%	5%	9%	33%
NB Local	12%	5%	6%	8%	9%	6%	8%	54%
NS	1%	1%	1%	1%	1%	1%	1%	7%
PEI	1%	1%	-	-	1%	-	-	3%
USA	-	-	-	-	1%	-	-	2%
Total	17%	8%	12%	15%	16%	13%	19%	100%

All percentages are rounded.

The next series of tables (Tables 12-16) breaks down the responses for each information type. The following information sources are the most common for snowmobilers to use for trip planning:

- Word of mouth (62%);
- N.B. Sledders (50%);
- Facebook (50%);
- On Snow Magazine (33%); and
- Bathurst accommodations (28%).

Table 13. The percentage of snowmobilers using snowmobile shows

Respondents	Toronto	Drummondville	Maine	Quebec City
CAN Other	2%	1%	2%	3%
NB Distant	2%	2%	2%	4%
NB Local	1%	-	-	-
NS	-	-	-	-
PEI	-	-	1%	-
USA	-	-	-	-
Total	5%	3%	5%	7%

Note: Each location is where a snowmobile show features New Brunswick information.

Table 14. The percentage of snowmobilers using magazines

Respondents	On Snow Magazine	Motoneiges Québec	Intrepid Snowmobiler	Motoneiges.ca Sledmagazine.com	American Snowmobiler	Snow Tech	Sledworthy
CAN Other	12%	1%	5%	3%	1%	3%	1%
NB Distant	19%	1%	7%	3%	2%	5%	2%
NB Local	2%	-	-	1%	-	1%	-
NS	1%	-	-	-	-	-	-
PEI	-	-	-	-	1%	-	-
USA	-	-	-	-	-	-	-
Percent	34%	2%	12%	7%	4%	9%	3%

Table 15. The percentage of snowmobilers using social media

Respondents	Facebook	Twitter	Instagram	NB Sledders
CAN Other	20%	-	2%	21%
NB Distant	26%	1%	2%	24%
NB Local	3%	-	-	3%
NS	1%	-	-	2%
PEI	1%	-	-	1%
USA	-	-	-	-
Percent	51%	1%	4%	51%

Table 16. The percentage of snowmobilers using accommodation sources

Respondents	Edmundston	Campbellton	Bathurst	Miramichi	Moncton	Fredericton
CAN Other	5%	4%	9%	4%	1%	3%
NB Distant	5%	4%	13%	7%	1%	4%
NB Local	1%	1%	4%	2%	-	-
NS	-	1%	1%	1%	-	-
PEI	-	-	-	-	-	-
USA	-	-	-	-	-	-
Percent	11%	10%	27%	14%	2%	7%

Table 17. The percentage of snowmobilers using traditional sources

Respondents	Word of Mouth	Newspapers	Television	Radio
CAN Other	24%	1%	4%	2%
NB Distant	30%	1%	3%	3%
NB Local	5%	-	1%	-
NS	2%	-	-	-
PEI	1%	-	-	1%
USA	-	-	-	-
Percent	62%	2%	8%	5%

3.9 Volunteering for snowmobile trail development

Volunteers contribute their time and resources to help develop snowmobile trails and experiences in New Brunswick. We asked questions about volunteering through the general survey as well as a specific PEI survey for snowmobile club representatives. The main observations related to the table below are:

- ❄️ A total of 1.2 million volunteer hours are contributed by all snowmobilers;
- ❄️ About half (53%) of the hours are for trail maintenance and development, including 33,553 hours for grooming which is recorded from each machine;
- ❄️ Administrative activities amount to 42% of volunteer hours;
- ❄️ About 13% of all snowmobilers volunteer, including 2,200 that volunteer for trail maintenance activities, and 840 contribute to administrative activities;
- ❄️ Over half the year (26) weeks, a weekly average of 13 hours is contributed by those involved in administration, and 7 hours by those doing trail maintenance;
- ❄️ Applying a rate of \$18 per hour to volunteer time, the total hours represents almost \$21 million in value.

Table 18. Volunteer hours by trail development activity

	Administration	Trail Maintenance	Other	Total
NB Distant	92	95	16	202
NB Local	176	271	16	464
NS	9	3	1	13
PEI	-	-	-	-
CAN Other	-	-	-	-
USA	-	1	1	2
Clubs	201	243	2	472
Total	478	614	60	1,152
Percent	42%	53%	5%	100%

All figures are rounded.

Survey participants were also asked about in-kind donations for trail development. They were asked about personal donations separate from business donations (two tables below). The highlights are:

- ❄ Almost three-quarters (71%) of in-kind donations involve personal items, and over one-quarter (29%) are business items;
- ❄ The most common personal items are snowmobiles and maintenance tools, while the most common business items are trucks and maintenance tools; and
- ❄ One-third (33%) of all snowmobilers make at least one in-kind personal or business contribution to snowmobile trail development.

Table 19. Personal in-kind donations by type

	Cars	Trucks	Trailers	Snowmobiles	Tools	Land	Buildings	Heavy Equipment	Fuel
NB Distant	168	172	386	689	706	202	235	151	706
NB Local	235	1,058	571	1,344	1,260	386	269	336	1,461
NS	0	34	34	50	17	34	-	-	34
PEI	-	-	-	34	-	-	-	-	17
CAN Other	-	34	0	17	17	-	-	17	34
USA	-	34	17	34	34	-	-	-	50
Clubs	235	353	302	370	319	202	269	286	353
Total	638	2,184	1,310	2,537	2,352	823	773	790	2,654

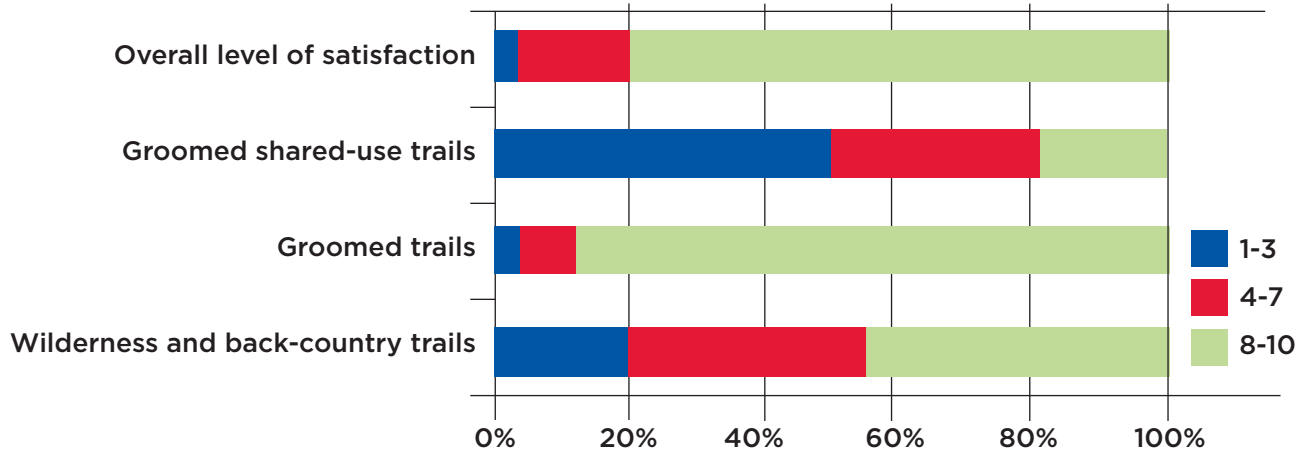
Table 20. Business in-kind donations by type

	Cars	Trucks	Trailers	Snowmobiles	Tools	Land	Buildings	Heavy Equipment	Fuel
NB Distant	67	218	101	118	118	151	185	168	269
NB Local	34	437	235	252	521	235	168	336	521
NS	-	17	-	34	-	17	17	-	34
PEI	-	-	-	-	-	-	-	-	17
CAN Other	-	-	-	-	-	-	-	-	0
USA	-	17	-	-	-	-	-	-	17
Clubs	67	202	185	118	252	202	168	286	252
Total	168	891	521	522	891	605	538	790	1,110

3.10 Trail preferences

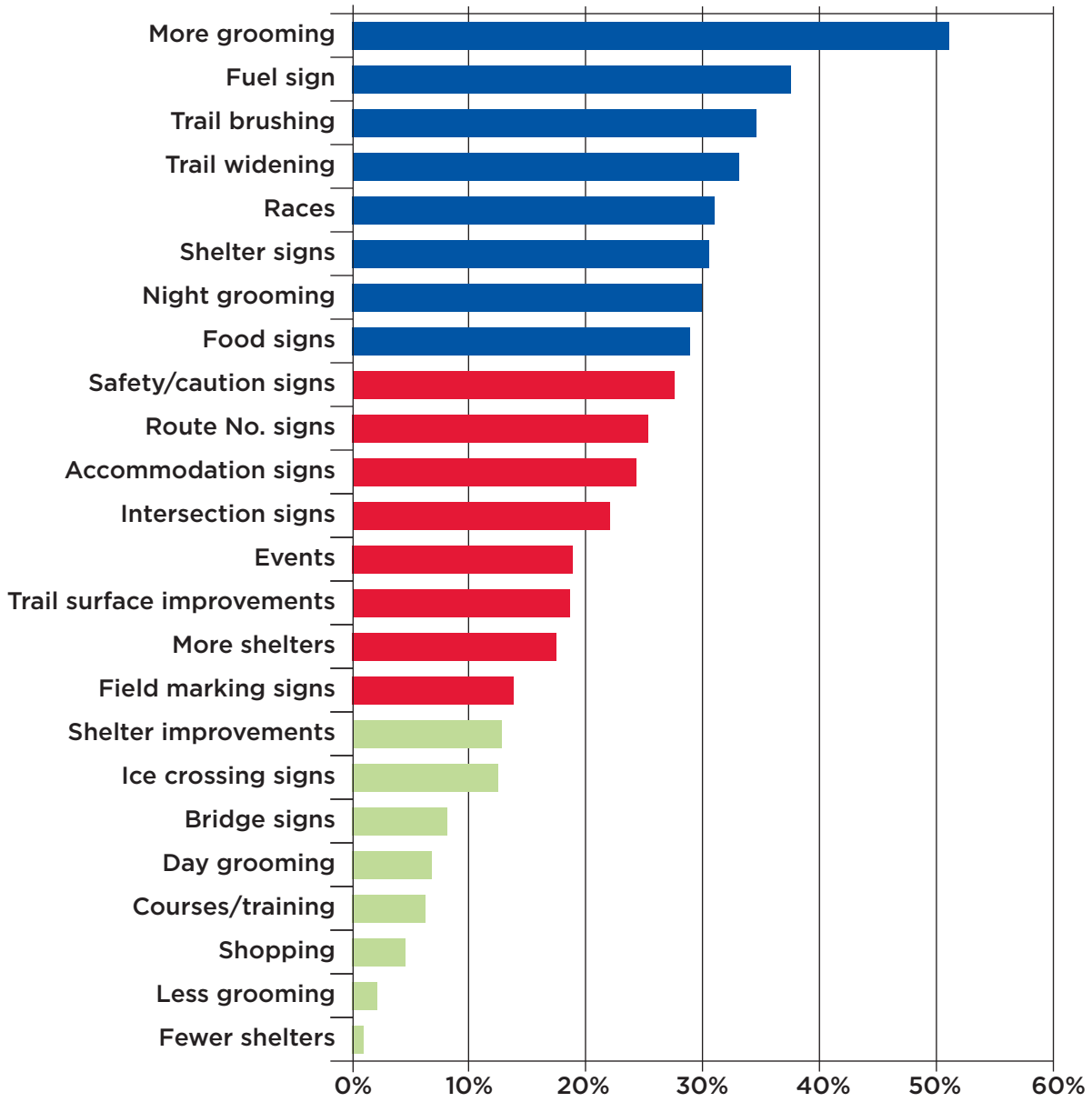
Survey respondents used a 10-point scale to rate their satisfaction of different types of trails and their overall satisfaction with New Brunswick snowmobile trails. The overall satisfaction is very high with 80% giving a rating from 8 to 10. Groomed trails for snowmobiles earned the highest satisfaction (86% rate this 8 to 10), while 46% give a high rating (8 to 10) for wilderness trails, but only 18% give a high rating for groomed shared-use trails.

Figure 2. Satisfaction ratings (1-10) for different types of trails



A list of trail improvements was presented to survey participants and they were asked to select the ones that they support. The main topics include: trail grooming, signage, shelters, trail improvements, and other interests while snowmobiling in New Brunswick. The top five items with the most snowmobiler support are: 1) more grooming, 2) more fuel signage, 3) more trail brushing, 4) trail widening, and 5) snowmobile races.

Figure 3. Percent of snowmobilers supporting different trail improvements



3.11 Trail activity counts

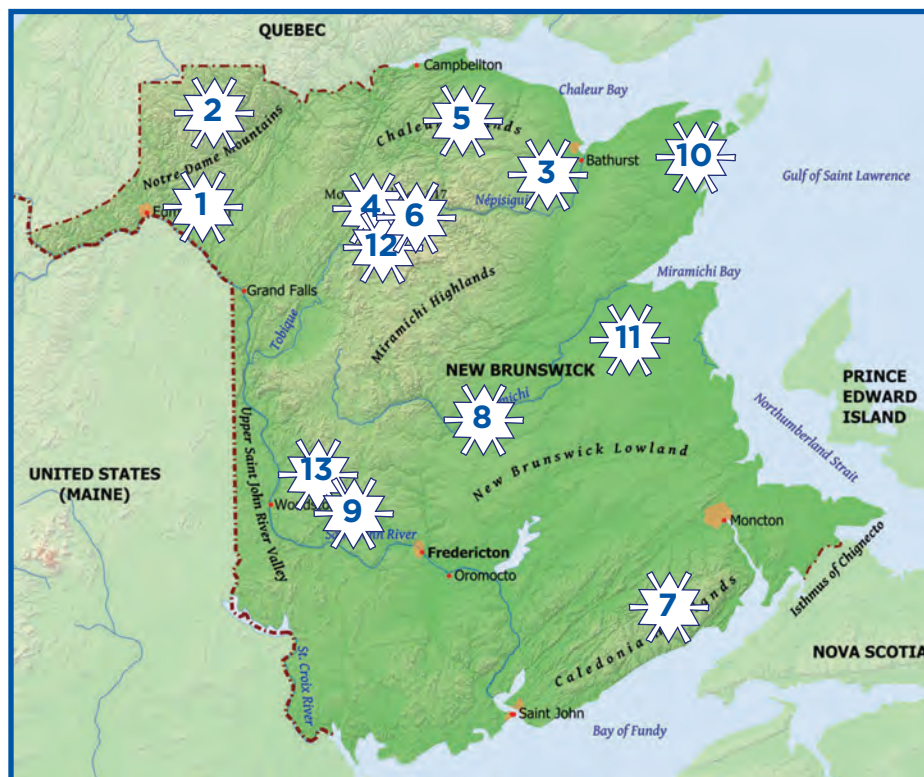
Trail counters were installed on twelve (12) trails in 2019 to track snowmobile activity throughout the season. These counts capture snowmobiles rather than people, and a snowmobile may pass by the same counter more than once on a trip or may pass by counters on more than one of these trails in a trip. There are many other trails in the New Brunswick network so the statistics shown below are an indication of snowmobile activity on certain trails.

Trails with counters installed and numbers correspond to map in Figure 4:

- | | |
|------------------------------|-------------------------------|
| 1. Trail 12 - Green River | 8. Trail 42 - McNamee |
| 2. Trail 17 - Moose Valley | 9. Trail 44 - Millville |
| 3. Trail 19 - Bathurst | 10. Trail 48 - Inkerman |
| 4. Trail 19 - Mount Carleton | 11. Trail 52 - Rogersville |
| 5. Trail 22 - Island Lake | 12. Trail 58 - Mount Carleton |
| 6. Trail 23 - Mount Carleton | 13. Trail 44 - Woodstock |
| 7. Trail 31 - Adair's | |

A total of **44,163 trips** were recorded by the trail counters and the following series of tables show some of the patterns of interest. Keep in mind 231,000 snowmobiling days were reported in the survey (Table 8) and more than one trail is likely travelled per day so **these counts represent at most 19% of all activity.**

Figure 4. Location of trails with counters in 2019



The top four trails according to highest trip counts are the most northern trails shown on the map (#2, 5, 3, 10). These four trails account for just over half (53%) of all snowmobile activity among these trails.

Table 21. Season trip counts by snowmobile trail, 2018

Trail	Season Counts	Percent
2. Trail 17 Moose Valley	7,446	17%
5. Trail 22 Island Lake	5,689	13%
3. Trail 19 Bathurst	5,316	12%
10. Trail 48 Inkerman	4,972	11%
9. Trail 44 Millville	4,414	11%
1. Trail 12 Green River	4,056	9%
8. Trail 42 McNamee	3,701	8%
11. Trail 52 Rogersville	3,069	7%
12. Trail 58 Mount Carleton	2,499	6%
4. Trail 19 Mount Carleton	1,480	3%
6. Trail 23 Mount Carleton	1,418	3%
7. Trail 31 Adair's (COUNTER STOLEN)	103	-
13. Trail 44 Woodstock (COUNTER STOLEN)	-	-
Total	44,163	100%

The counts are highest on Saturday (34%) as expected, followed by Sunday (14%) and then Friday (14%). Nearly half (47%) of snowmobile activity occurs on weekends.

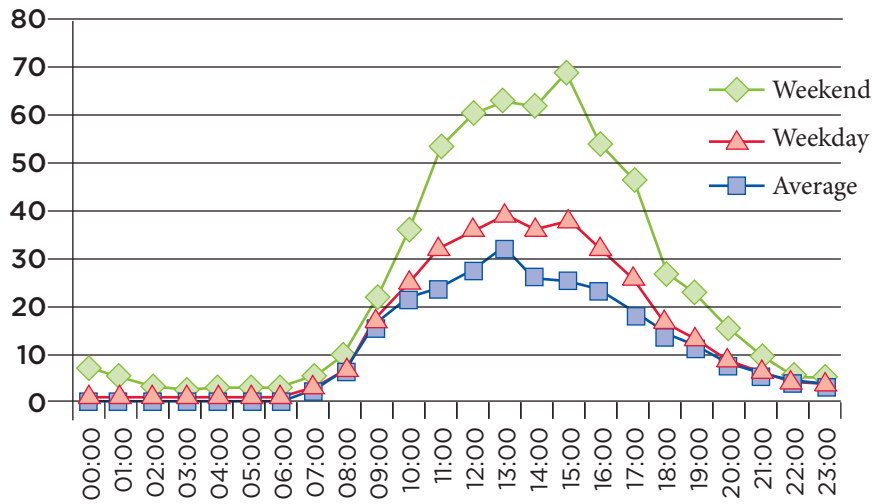
Table 22. Season trip counts by day of the week, 2018

Day	Season Count	Average Count	Percent
Monday	2,814	154	6%
Tuesday	3,753	210	9%
Wednesday	5,091	285	12%
Thursday	5,268	301	12%
Friday	5,924	332	14%
Saturday	14,847	822	34%
Sunday	6,466	356	14%
Total	44,163	2,460	100%

All percentages are rounded.

Across all measured trails, the average hourly trip counts (Figure 5) show a sharp rise in activity starting at 7 am to a peak at 3 pm, and activity that extends until after midnight. Night activity may include grooming machines on some trails. In the middle of a weekend day there are about 60 snowmobiles active on these trails, and the count is nearly 30 for the middle of weekdays. Finally, keep in mind that depending on the placement of counters on the trail (sometimes in the middle) snowmobiles may have been active for a while before and after passing the counting machine.

Figure 5. Hourly trip counts by day of the week, 2019



4. Economic Impacts

4.1 Trip spending impacts

The starting point for economic impact analysis is the \$29 million spending estimate for the 19,100 permit holders and the breakdown of this spending according to type of expenditure (i.e. accommodations, transport, food etc). Statistics Canada’s economic model uses these spending values as inputs and produces the following economic impact indicators (table below). The highlights include:

- ❄ The added-value (GDP) to the New Brunswick economy is about \$24.7 million;
- ❄ The income (wages and salaries) earned in the province totals \$14.5 million;
- ❄ About 598 full-time equivalent (FTE) jobs are gained in the province;
- ❄ The federal and provincial taxes generated within New Brunswick are \$2.4 and \$2.9 million respectively; and
- ❄ Economic impacts extend to other provinces including another \$7.7 million in added-value, \$4.4 million worth of income, and another 90 jobs

Table 23. Economic impacts of snowmobile trip spending

(\$000s)	Direct	Indirect	Induced	Total NB	Total Canada
Output	29,368	8,794	6,272	44,434	60,424
GDP	16,122	4,762	3,833	24,717	32,431
Income	10,328	2,668	1,512	14,508	18,883
Employment ¹	491	63	44	598	688
Federal tax ²	1,024	302	1,081	2,407	2,846
Provincial tax ²	1,506	389	977	2,873	3,447
Municipal tax	103	13	49	165	387

Source: Statistics Canada interprovincial economic impact model, 2014.

1. Employment is full-time equivalents. 2. Taxes exclude personal income taxes and corporate taxes.

4.2 Equipment and gear spending impacts

Equipment and gear spending is handled differently in the economic impact analysis since snowmobiles, trailers, and other specialized clothing and gear is manufactured outside the province. Based on Industry Canada financial performance data for New Brunswick recreational vehicle and sporting good retailers, we apply a retail margin of 27.4% to the spending estimate to represent the activity in the province (\$39.1 million result) and present economic impact indicators (table below). The highlights include:

- ❄ The added-value (GDP) to the New Brunswick economy is about \$36.4 million;
- ❄ The income (wages and salaries) earned in the province totals \$22.8 million;
- ❄ About 579 full-time equivalent (FTE) jobs are gained in the province;
- ❄ The federal and provincial taxes generated within New Brunswick are \$3.5 and \$4.1 million respectively; and
- ❄ Economic impacts extend to other provinces including another \$9.7 million in added-value, \$5.6 million worth of income, and another 114 jobs.

Table 24. Economic impacts of snowmobile equipment and gear spending

(\$000s)	Direct	Indirect	Induced	Total NB	Total Canada
Output	39,368	11,447	9,800	60,615	79,012
GDP	24,046	6,356	5,990	36,392	46,136
Income	16,900	3,550	2,363	22,813	28,454
Employment ¹	427	82	69	579	693
Federal tax ²	1,404	371	1,720	3,495	4,066
Provincial tax ²	2,099	441	1,514	4,053	4,809
Municipal tax	130	25	66	221	519

Source: Statistics Canada interprovincial economic impact model, 2014.

1. Employment is full-time equivalents. 2. Taxes exclude personal income taxes and corporate taxes.

4.3 Summary impacts

The economic impacts can be expressed in terms of contributions from New Brunswick resident, Visitors to the province, and volunteers:

Table 25. Total economic impacts of New Brunswick Residents and Visitors

(\$000s)	Residents	Visitors	Total NB
Output	97,563	7,486	105,049
GDP	56,849	4,260	61,109
Income	34,769	2,552	37,322
Employment ¹	1,084	92	1,177
Federal tax ²	5,489	413	5,902
Provincial tax ²	6,437	489	6,926
Municipal tax	358	28	385

Source: Statistics Canada interprovincial economic impact model, 2014.

- ❄️ **New Brunswick residents** - spend \$98 million that adds \$57 million in value (GDP) to the economy including \$35 million in wages and salaries for 1,084 full-time equivalent employees.
- ❄️ **Visitors to the province** - spend \$7.5 million that adds \$4.3 million in value (GDP) to the economy including \$2.6 million in wages and salaries for 92 full-time equivalent employees.
- ❄️ **Volunteer contributions** - the network of NBFSC affiliated snowmobile clubs contribute 1.2 million hours of their time that is worth about \$21 million, as well as in-kind donations of equipment, vehicles, land and buildings that are not valued here. The economic impacts totaling \$61 million in added-value (GDP) to the New Brunswick economy would not be possible without this volunteer base.



December, 2019

Snowmobile Economic Impact Study



A Volunteer Organization
Une organisation bénévole