

The Economic Impact of ATV Tourism in New Brunswick by NBATVF Trail Permit Holders

2010 – 2011

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Executive Summary

The New Brunswick All Terrain Vehicle Federation (NBATVF) is the trail manager for the province's recreational ATV trail network, under the authority of a trail management agreement with the Department of Natural Resources. The NBATVF is attempting to develop a province-wide ATV trail network linked to local trails, to provide for a safe recreational ATV travel experience in New Brunswick.

This report presents the findings of a New Brunswick All Terrain Vehicle Tourism Economic Impact Study. It was prepared by the Department of Culture, Tourism and Healthy Living (CTHL) in consultation with the NBATVF. The NBATVF requested this study in the interest of establishing a baseline economic impact for ATV tourism in New Brunswick at the early stage of ATV tourism product development.

The study focused solely on ATV tourism in New Brunswick, by provincial residents who held trail permits from the NBATVF and took out-of-town ATV trips in the 12 months prior to June 2011. The study was based on methodology used in other Canadian economic impact studies of ATV and snowmobile tourism, including the Snowmobile Tourism Economic Impact Study prepared by CTHL (then Tourism and Parks) for the New Brunswick Federation of Snowmobile Clubs in 2010.

As of 2010, there were 35,825 ATVs registered in New Brunswick and there were a total of 9,122 trail permit holders. 8,057 of these trail permit holders were from New Brunswick. A telephone survey was conducted with 400 New Brunswick resident trail permit holders in June 2011.

The survey indicated that 26.5% of New Brunswick resident trail permit holders had participated in ATV tourism trips in the year prior to June 2011. It was estimated that, in this period, 2,135 New Brunswick resident trail permit holders took 34,000 same-day trips, which covered 3.6 million kilometers in the province on out-of-town recreational ATV trips. Further, an estimated 544 New Brunswick resident trail permit holders spent 2,373 nights on overnight ATV tourism trips in the province.

The majority of these trips by permit holders were taken during the winter (an average of 6 trips), followed by summer and fall (an average of 4 trips) and spring (an average of 2 trips). The most frequently visited destinations (43%) were in the northern New Brunswick counties of Gloucester, Restigouche, Madawaska and Victoria.

This level of ATV tourism activity is likely to be sustained as 77% of those surveyed indicated that they planned to maintain or increase their level of ATV activity in the next five years. The same percentage (77%) indicated that they would increase their level of ATV activity if they had greater access to club or ATV federation trails. Other reasons given for increased ATV activity included retirement, recreation in the outdoors, social activity, more time with friends and family, visiting specific destinations, hunting and fishing. Participants who anticipated a reduction in ATV activity cited such factors as lack of access to trails, age, health, family reasons, cost of gas and sale of ATVs.

Trail permit holders spent an average of \$51.88 per person on same-day out-of-town ATV tourism trips, while trail permit holder's travel parties spent an average of \$1,653 on same-day out-of-town trips in New Brunswick annually.

Total ATV tourism visitor spending of \$3.96 million (including trail permit sales) generated a total sales volume of 7.2 million dollars, and the value added to the provincial economy from this visitor spending was estimated at 2.5 million dollars. Provincial tax revenues were estimated at \$331,000, while municipal tax revenues (through property taxes) were estimated at \$53,000. This level of economic activity was estimated to sustain approximately 54 jobs (full-time equivalent person-years of employment).

In addition to ATV visitor spending, this analysis included expenditures by the NBATVF for trail development and operations in 2010, to provide infrastructure and services for the 2010-2011 ATV tourism season. These expenditures totaled \$2.5 million, including \$2.1 million in trail development projects.

NBATVF trail development and operational expenditures in 2010, combined with annual New Brunswick resident trail permit holder visitor spending generated a total sales volume of \$12.2 million dollars, and the value added to the provincial economy from this ATV tourism visitor spending was estimated at \$4.9 million dollars. Provincial tax revenues were estimated at \$670,000.

This study of the economic impact of ATV tourism in New Brunswick is not intended to be comparable to studies concerned with all economic activity related to ATV sales, service, insurance and operation by household and businesses. Such studies do not examine tourism specifically and should not be compared to tourism economic impact analyses.

Introduction

The New Brunswick All Terrain Vehicle Federation (NBATVF) is a non-profit organization with nearly 9,000 members in 57 member clubs throughout the province. The NBATVF is the designated trail manager for New Brunswick's ATV trail network by authority of a trail management agreement with the Department of Natural Resources. The NBATVF vision is for the development of a province-wide ATV trail network linked to local member trails, to facilitate safe ATV travel experiences within New Brunswick. The NBATVF is also interested in exploring the potential of ATV tourism product development.

The New Brunswick Federation of Snowmobile Clubs (NBFSC) is a partner in the development of New Brunswick's overall Trail Management Strategy along with the NBATVF. The NBFSC has been actively developing snowmobile trail networks and a snowmobile tourism product since the early 1990s. The New Brunswick Department of Tourism and Parks has assisted the NBFSC in promoting the 7,000 kilometers of "White Gold" snowmobile trails, through a marketing partnership including the four Northern New Brunswick cities of Edmundston, Campbellton, Bathurst, and Miramichi. The New Brunswick Department of Tourism and Parks has also undertaken studies to quantify the economic benefits attributable to snowmobile tourism.

In 2006, the Canadian All Terrain Vehicle Distributors Council (CATV) commissioned an economic impact study of ATV sales, service, commercial and recreational use, and all related economic activities¹. That study was based for the most part on gross sales and various administrative data. The CATV study estimated an economic impact of \$2 billion on the Canadian GDP (direct and indirect), and \$50 million on New Brunswick's provincial GDP.

The NBATVF was interested in establishing a baseline economic impact of ATV tourism in New Brunswick, at the nascent stage of ATV tourism product development in 2010-2011. The New Brunswick Department of Tourism and Parks undertook this study on behalf of the NBATVF, to examine ATV tourism economic impacts specifically. International and national tourism concepts and definitions were followed, and this study adapted a survey methodology developed by the Québec Ministry of Tourism to assess ATV and snowmobile tourism. This was the same methodology used for the most recent NBFSC snowmobile tourism economic impact study. This NBATVF study was consistent with the NBFSC study in its focus on tourism trip characteristics and spending by trail permit holders during tourism trips.

¹ Canadian All Terrain Vehicle Distributors Council (December, 2006). The Economic Impact of All Terrain Vehicle Recreation in Canada: National, Provincial, and Territorial. Retrieved February 23, 2012, from <http://www.cohv.ca/impact.pdf>

Method

Participants

This study involved New Brunswick residents who registered for NBATVF ATV trail permits in 2010 and provided consent in the permit application form to be contacted by the NBATVF for purposes including this study.

Of 9,122 NBATVF trail permit holders, there were 8,057 New Brunswick resident trail permit holders from distinct households with valid contact information. Of those, 1,817 provided permission to be contacted. Surveys were conducted with 400 New Brunswick resident NBATVF trail permit holders drawn from a randomized list of the 1,817 contacts. The county of residence and the NBATVF club of membership for the 400 trail permit holders contacted is listed in Appendix 1.

Non-resident NBATVF trail permit holders numbered 81 in 2010, and considering survey response and completion rates, this was deemed to be an insufficient sample to assess non-resident ATV tourism trips in New Brunswick at the time of this study.

Participants were screened through an initial set of four questions to ensure consistency with Statistics Canada and World Tourism Organization definitions of travellers and tourism trips². Participants included in this study were at least 18 years of age, took recreational ATV trips in New Brunswick within the past 12 months, and took at least one of these recreational ATV trips outside of their local area. Following Statistics Canada travel survey interview guidelines, a 40 kilometer (25 mile) one-way trip distance and the example of a recreational ATV trip to the Fundy Park area from Moncton was used to help participants determine whether any of their ATV trips represented tourism trips. This screening excluded three participants under the age of 18, 78 participants who had not taken any recreational ATV trips within the last year, and 211 participants who had not taken any recreational ATV trips outside of their local area. The 106 NBATVF trail permit holders who took recreational ATV trips outside of their local area within the past 12 months indicated an ATV tourism incidence rate among New Brunswick resident trail permit holders of 26.5% (± 4 percentage points at the 95% confidence level).

The basic demographic and ATV usage characteristics of the NBATVF trail permit holders who reported out-of-town ATV tourism trips in New Brunswick within the past 12 months are listed in the following table. The majority were men (77%), in the labour force (69%), between the ages of 35 and 64. More of the New Brunswick resident NBATVF trail permit holders were French speaking than English speaking (56% versus 44%). Reported education levels were split between high school (51%) and higher education including community college / trades and university (49%).

These demographics among the survey sample were consistent with the entire survey population of NBATVF trail permit holders, based on demographic estimates derived from a postal code analysis of the 2010 NBATVF trail permit holder list³. Within the 2010 NBATVF trail permit holder neighbourhoods, 64% of the population was in the labour force, and the majority were between the ages of 35 and 64. The mother tongue was French for 58% of this population, and 40% had English as their mother tongue. Reported education levels were split between high

² Statistics Canada (2011, March). Travel Survey of Residents of Canada (TSRC). Retrieved February 21, 2012, from <http://www.statcan.gc.ca/imdb-bmdi/3810-eng.htm>

³ Environics Analytics (2012). Demographic Estimates and Projections

school (56%) and higher education including community college / trades (44%).

All of these New Brunswick resident NBATVF trail permit holders owned ATVs, and 76% usually drove on their ATV trips. Other uses for their ATVs included work (18%), and hunting or fishing (61%). Snowmobiles were also used at least occasionally by 18% of New Brunswick resident NBATVF trail permit holders who reported out-of-town ATV tourism trips in New Brunswick within the past 12 months.

Demographic Characteristic	Number of participants	Percentage of Participants⁴
Gender		
Men	82	77%
Women	24	23%
Language		
French	59	56%
English	47	44%
Education Level		
High school	53	51%
Community College	33	32%
University	17	17%
Employment Status		
Working	70	69%
Retired	25	24%
Stay-at-home Parent	2	2%
Other	5	5%
Age Category		
18-24	3	3%
25-34	8	8%
35-44	29	27%
45-54	21	20%
55-64	28	27%
65-74	13	12.5%
74+	2	2%
ATV Usage Characteristic		
Own ATV	104	100%
Usually ATV Driver or Passenger		
Driver	79	76%
Passenger	20	19%
Both Equally	4	4%
Also Use ATVs for		
Work / Employment	19	18%
Hunting / Fishing	65	61%
Also Use Snowmobiles	19	18%

Table 1: Demographic and ATV usage characteristics of NBATVF trail permit holders who reported out-of-town ATV tourism trips in New Brunswick in 2010-2011

⁴ Note that non-responses to questions are not listed in this table, and percentages are calculated on the basis of total responses rather than total number of participants.

Of the demographic and ATV usage questions asked of all New Brunswick resident NBATVF trail permit holders contacted, some differences were apparent between the overall sample and those participants who did report out-of-town ATV tourism trips in New Brunswick within the past 12 months. In the overall sample of New Brunswick resident NBATVF trail permit holders, 30% of those contacted were women. This was a higher percentage, although not significantly higher, than the 23% of women among those participants that did report ATV tourism trips. All of the New Brunswick resident NBATVF trail permit holders that used their ATVs for work, hunting, or fishing were among those participants that reported ATV tourism trips. Similarly, all 19 respondents who reported recreational snowmobile use were among those reporting ATV tourism trips, raising snowmobile usage incidence from 5% in the overall group to 18% among the participants that reported ATV tourism trips.

Survey Instrument

The survey instrument for this study was adapted from that developed for the Québec Ministry of Tourism's 2005 study of recreational snowmobiling and ATVing in Québec⁵. The survey instrument may be found in the Appendix.

The survey was comprised of five sections, as follows:

Section 1

The first section included four screener questions to determine that participants were 18 years of age or older, had gone on ATV trips in New Brunswick in the past 12 months, had gone on recreational ATV trips, and had taken at least some of these recreational ATV trips outside of their local area (for example, a Moncton resident trail permit holder took a recreational ATV trip in the Fundy National Park area).

Section 2

The second section inquired about same-day out-of-town recreational ATV trips in New Brunswick. Participants were asked about the number of trips taken in the past 12 months by season – Spring 2011 (April and May 2011), Winter 2010-2011 (November 2010 to March 2011), Fall 2010 (September and October 2010), and Summer 2010 (June to August 2010).

If participants had taken at least one qualifying trip in any of those seasons in the past 12 months, they were asked about their same-day ATV trip destinations in New Brunswick and typical trip distance. Testing of the survey instrument had indicated that some participants might have difficulties in reporting ATV trip distances in terms of kilometers or miles, and so an option to report trip duration in terms of hours was also included. Distance questions were split into distance travelled on the ATV itself, versus the total distance travelled in a vehicle hauling an ATV to a trail or other ATV tourism destination.

Finally in this section, participants were asked how much they spent on vehicle operation and fuel, food and beverages at restaurants, grocery, or convenience stores, and any other retail expenses while on typical ATV trips. Participants were asked if there was a season when they took more extensive and/or expensive same-day ATV tourism trips in New Brunswick, and if so, the distance and categorized spending questions were repeated for their peak season.

⁵ Québec ministère du Tourisme (2005). La pratique récréotouristique de la motoneige et du quad au Québec. Retrieved on February 23, 2012, from <http://www.tourisme.gouv.qc.ca/publications/publication.php?id=23&categorie=66>

Section 3

The third section of the survey instrument presented the same ATV tourism destination, distance, and spending questions as Section 2, to those participants who reported taking any out-of-town recreational ATV trips of one or more nights in New Brunswick in the past 12 months. Distance questions were split into distance travelled on the ATV itself, versus the total distance travelled in a vehicle hauling an ATV to a trail or other ATV tourism destination. In addition, participants were asked how many nights they spent on ATV trips in New Brunswick in the past 12 months, and how many nights they spent in what types of paid and/or unpaid accommodations.

Section 4

Section four asked participants about their ATV usage, their ATV trip motivations, and their anticipated level of ATV travel activity over the next five years. From a product development perspective, participants were asked about the facilities or services they expected from a managed ATV trail.

Section 5

The final section of the survey asked about basic demographic characteristics including participants' age category, education level, and labour force status.

Procedure

The New Brunswick Department of Tourism and Parks' Tourism Communication Centre called telephone numbers provided in randomly selected New Brunswick resident NBATVF 2010 trail permit applications where the applicants had clearly provided permission for the NBATVF and its partners to contact them for information and research purposes. Four hundred computer-assisted telephone interviews (CATI) were conducted between June 10th and June 29th, 2011, between the hours of 8 AM and 7 PM.

When a trail permit holder was reached, they were told that they were being contacted on behalf of the New Brunswick All Terrain Vehicle Federation, and they were asked if they would be willing to participate in the survey about their recreational ATV travel within New Brunswick. Those who were willing to participate were asked the screening questions described in the survey instrument section above. Those who qualified for this study of ATV tourism in New Brunswick were asked about their ATV usage and their same-day and/or overnight ATV trips as described in the survey section above. Responses were recorded in a Microsoft Visual Basic for Applications (VBA) database application implemented in Microsoft Access 2007, with automated forms consistently guiding the interviewers through the survey instrument questions, prompts, and valid responses for each question. Interviews took between 2 to 20 minutes, with an average interview for a qualified participant taking approximately 15 minutes.

Data preparation and weighting

Survey responses from the 400 New Brunswick resident NBATVF trail permit holders were transferred into the SPSS statistics package for analysis⁶.

The numbers of same-day out-of-town recreational ATV trips in New Brunswick reported by

⁶ Predictive Analytics Software (2009). PASW Statistics (Version 18).

NBATVF trail permit holders for each season were inspected for outliers. Responses of 20 trips in the Spring of 2011, 50 trips in the Fall of 2010, and 36 trips in the Summer of 2010 were found to be more than two standard deviations from the observed mean (average number of trips reported for each season). These outliers were excluded from the analysis.

All ATV trip distances were converted to kilometers (although only 7 respondents reported distances in miles). Eight participants provided ATV trip durations in hours (ranging from 2 to 10 hours), but since this represented a small subsample of ATV trip lengths, no further analyses on trip durations were undertaken in this study. Only the distance estimates reported by the majority of participants were examined further. Similarly, only eight participants reported same-day travel distances for transportation of their ATV to a trail or ATV tourism destination. Therefore, only trip distances covered on the ATV itself were examined further in this study.

Typical and peak ATV trip distances were examined for outliers. One participant reported a same-day ATV trip distance of 400 kilometers, which was more than two standard deviations above the mean. This was filtered out of distance analyses as an outlier.

With typical same-day ATV trip distances, peak distances for a specified season, and the number of trips per season, estimates of total distance covered on same-day ATV trips per season during the past 12 months could be calculated. Typical ATV trip distances were assigned to each season for each participant, and if a peak season was reported by a participant, the peak ATV trip distance was assigned to that peak season. As noted previously, these estimates included only the distances reported for travel on the ATV, not transportation of the ATV.

Total distances travelled including transportation of the ATV were considered for an analysis of the ratio of fuel spending to distance travelled for same-day ATV trips in New Brunswick. Participants reported spending from \$0.07 to \$1.75 per kilometer travelled on their typical same-day ATV trips in New Brunswick, with an average spend of \$0.38 per kilometer. Upon inspection of all reported ATV trip characteristics – origin, destination, travel party size, distance, and spending – the fuel spending of less than \$0.15 per kilometer observed in 11 records was deemed invalid. The fuel spending estimates for these records were replaced with a value based on the average fuel spend to distance ratio. The ratios of fuel spending to distance reported for participants' peak season same-day ATV trips in New Brunswick were normally distributed and did not exceed \$1.00 per kilometer.

Categorized same-day ATV trip spending estimates were assigned seasonally, just as distance estimates were. Participants reported their typical spending on a same-day ATV trip in New Brunswick, and if there was a particular season in which they usually spent more on such trips, they provided estimates for that season. The peak spending estimates were assigned to that season, while the participants' typical same-day ATV trip spending was assigned to the remaining three seasons. The season of peak trip spending was not necessarily the same season reported as the peak ATV season in terms of distance travelled. Total ATV tourism trip spending per season was estimated by multiplying the seasonal categorized trip spends by the number of trips reported for each season.

The inspection of same-day ATV trip spending estimates for outliers required the consideration of participants' trip distances but also the number of people in the ATV travel party that they shared their expenses with. The survey question phrasing (see Question 9 in the Appendix) attempted to have participants consider only the ATV trip spending that they were responsible for, and could reasonably account for: "We would like to determine the costs incurred by you and your household, such as your spouse or the children that accompanied you – basically, the people in your immediate travel party that you shared expenses with." However, 13 participants

reported that they typically travelled with groups of 12 to 30 on their same-day ATV trips in New Brunswick, and per-person spend estimates were unreasonably low in these cases. Upon inspection of categorized trip spending estimates against the number of persons reported in ATV trip travel parties, spending ratios appeared more consistent for travel parties of 6 or fewer. For reported ATV travel parties exceeding 6, the SPSS proximities procedure was used to match travel party sizes to categorized spending estimates based on least Euclidean distance between spending profiles. In effect, the typical trip spending on fuel, food, and retail was used to select the most likely travel party size for that spending profile.

Only 12 participants reported any spending on retail purchases while on their same-day, out-of-town ATV trips in New Brunswick. One participant reported spending \$500 on a typical trip, and this outlier was excluded from the analysis.

ATV rental spending was only reported by two participants. Two responses was not sufficient to derive credible estimates for ATV rentals, and so these were excluded from the analysis, in favour of a follow-up supply-side survey of ATV rental businesses.

Participants' records were weighted to represent the total number of New Brunswick resident NBATVF trail permit holders who took same-day ATV tourism trips in New Brunswick in the past 12 months, based on the 26.5% incidence rate observed in this study (8,057 trail permit holders X 26.5% = 2,135 ATV travellers). Therefore, 103 records (depending on missing values for any given survey question) were weighted equally to represent an estimated 2,135 NBATVF trail permit holders taking same-day ATV tourism trips in New Brunswick.

Estimates of ATV tourism trips of one or more nights in New Brunswick by NBATVF trail permit holders were complicated by the 6.75% incidence rate observed in this study, yielding only 21 participants who reported information about such trips. A sample of 21 records was insufficient to produce credible estimates of overnight ATV trip distances and spending. Returning to the NBATVF trail permit holder contact list to increase sample was deemed infeasible, since with the observed incidence rate of 6.75%, 1,900 surveys may have been required to provide a sample of 100 overnight trip records. This exceeded the number of NBATVF trail permit holders who provided permission to be contacted for this study. Therefore, this study attributed participants' same-day ATV trip characteristics and categorized spending for each night reported. For participants who reported nights spent in paid accommodations while on ATV tourism trips, the annual average New Brunswick accommodation room rate was attributed for each night reported⁷. The 6.75% of participants reporting ATV tourism trips of one or more nights in the past 12 months were weighted equally to represent an estimated 544 NBATVF trail permit holders taking such trips.

⁷ Conference Board of Canada (2011). Accommodation Trends.

The annual average daily rate for New Brunswick accommodations in 2010 (representing the majority of the ATV trip months considered in this study) was \$109.43.

Results

NBATVF Trail Permit Holder Locations

The following table lists the numbers and percentages of NBATVF trail permit holders residing in each of New Brunswick's counties, based on the postal codes in the 2010 NBATVF contact list.

The majority of trail permit holders (54%) resided in the counties of Gloucester, Westmorland, and Kent. Aside from the second-highest concentration of trail permit holders residing in Westmorland County, more trail permit holders resided outside of the most populated New Brunswick counties of Westmorland, York, and Saint John than within those counties (76% vs. 24%).

New Brunswick County	Number of NBATVF Trail Permit Holders in 2010	Percent
Gloucester	1,987	21%
Westmorland	1,794	19%
Kent	1,305	14%
Northumberland	801	8%
Restigouche	658	7%
Madawaska	654	7%
Victoria	429	5%
Albert	410	4%
Carleton	371	4%
Kings	302	3%
York	241	3%
Saint John	228	2%
Charlotte	163	2%
Sunbury	114	1%
Queens	27	0.3%

Table 2: New Brunswick resident NBATVF trail permit holder household locations by county

A map overlay of New Brunswick resident NBATVF trail permit holder locations and reported ATV trip destinations by county is depicted in Appendix 3.

ATV Trip Destinations in New Brunswick

The following table lists the percentages of New Brunswick resident NBATVF trail permit holders reporting ATV tourism trips within each of New Brunswick's counties. Participants were invited to name any places that they took ATV tourism trips to – specific trails, parks, counties, municipalities, or accommodations. 104 participants reported 258 ATV tourism trip destinations in total (participants were free to report any number of places). Postal codes were assigned to these places to facilitate reporting by standard geographic regions. Where specific addresses were not available, a postal-coded address was obtained through a lookup of nearby locations such as municipal offices or nearest service stations.

ATV tourism trip destinations reported by New Brunswick resident NBATVF trail permit holders were distributed throughout the province, with the exception of Sunbury county. Gloucester county received the largest percentage of mentions by participants (16%), and 43% of participants reported ATV tourism trip destinations in the Northern New Brunswick counties of Gloucester, Restigouche, Madawaska, and Victoria. This percentage of reported ATV tourism trip destinations in these Northern New Brunswick counties slightly exceeded the percentage of NBATVF trail permit holders residing in those same counties (40%).

New Brunswick County	Reported Same-Day ATV Trip Destinations (n=104)
Gloucester	16%
Restigouche	12%
York	10%
Kent	9%
Madawaska	9%
Westmorland	7%
Northumberland	7%
Carleton	7%
Victoria	6%
Kings	6%
Albert	4%
Saint John	3%
Queens	3%
Charlotte	1%
Sunbury	-

Table 3: Percentages of New Brunswick resident NBATVF trail permit holders reporting ATV tourism trip destinations within each of New Brunswick's counties

A map overlay of New Brunswick resident NBATVF trail permit holder locations and reported ATV trip destinations by county is depicted in Appendix 3.

Same-Day ATV Tourism Trip Characteristics

The following table lists characteristics of New Brunswick resident NBATVF trail permit holders' same-day ATV tourism trips in New Brunswick within the 12 months prior to June 2011.

ATV Trip Characteristic	Average	Median	Range	Standard Deviation	Sample size (n)
Number of Trips (past 12 months)	15	11	1 - 80	15.1	103
Trip Distance (km)	120	100	15-300	67.8	96
Number of People in Travel Party	7	5	1 – 30	5.9	92
Number of People included in Travel Party Spend Estimates	2	1	1 – 6	1.9	92
Trip Spending per travel party – Total	\$91.75	\$75.00	\$10-\$250	\$49.98	92
Fuel	\$43.68	\$40.00	\$10-\$100	\$24.74	92
Restaurants	\$36.19	\$30.00	\$10-\$120	\$20.30	73
Groceries	\$21.87	\$20.00	\$5-\$200	\$23.80	83
Retail	\$37.08	\$30.00	\$15-\$100	\$23.30	12

Table 4: Characteristics of New Brunswick resident NBATVF trail permit holders' same-day ATV tourism trips in New Brunswick in 2010-2011

Number of trips

On average, participants reported taking 15 same-day ATV trips over the past 12 months. Seasonally, spring saw the fewest trips (2 on average) while winter saw the most trips (6 on average). Participants reported an average of 4 trips in the summer and fall seasons.

The following chart depicts the average numbers of ATV tourism trips reported by New Brunswick resident NBATVF trail permit holders for each season within the past 12 months.

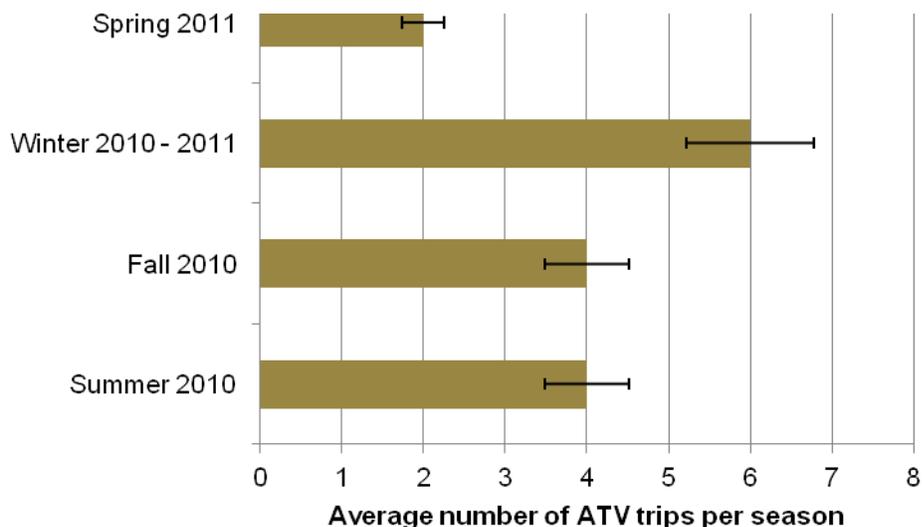


Figure 1: Average number of same-day ATV tourism trips taken seasonally in the past 12 months by New Brunswick resident NBATVF trail permit holders

Distance travelled

The average distance covered on ATVs (excluding any transportation of the ATV to the ATV tourism trip destination) by New Brunswick NBATVF trail permit holders on same-day ATV tourism trips in New Brunswick was 120 kilometers, with a wide range from 15 to 300 kilometers. Average same-day trip distances varied by season, with shorter distances covered in the spring and fall (118 – 199 kilometers) and farther distances covered in the summer and winter (131 and 122 kilometers, respectively).

The average NBATVF trail permit holder covered 1,674 kilometers annually, with a range from 26 to 7,900 kilometers (based on their number of trips, and trip distances factoring in peak season distances). The following chart depicts the total distance travelled by season.

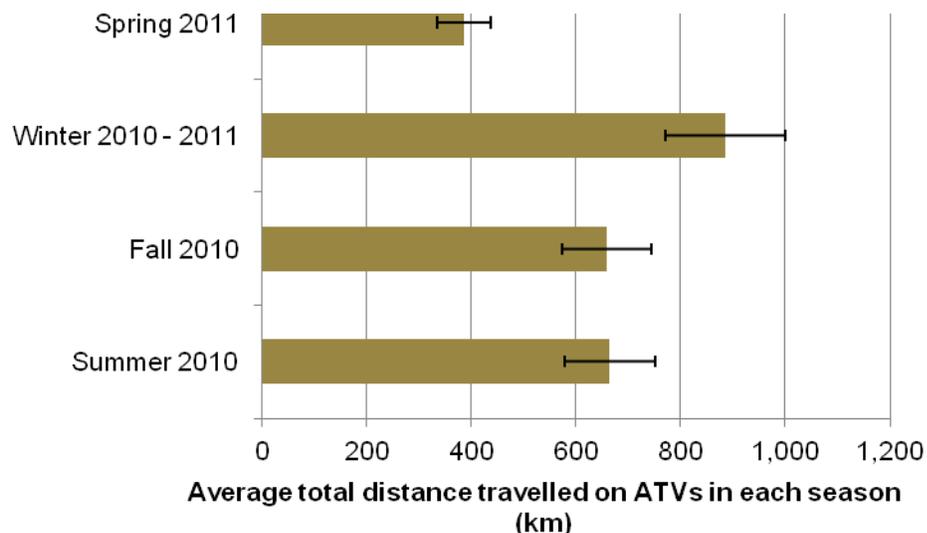


Figure 2: Average distance covered on ATV tourism trips seasonally by New Brunswick resident NBATVF trail permit holders

Based on the numbers of ATV trips and trip distances reported by the participants in this study, New Brunswick resident NBATVF trail permit holders travelled a total of 3,593,416 kilometers on ATV tourism trips in New Brunswick within the 12 months prior to June 2011.

Travel party sizes

Participants in this study reported taking same-day ATV tourism trips with 7 people in their travel party on average, with a wide range from solo trips to trips with 30 people in the travel party.

Same-day ATV tourism trip expenditures were shared amongst smaller groups of New Brunswick resident NBATVF trail permit holders, however, based on their spending patterns (refer to the Procedure section). Typically, participants split same-day ATV trip costs with one other person.

Trip spending

Average spending during a same-day ATV tourism trip in New Brunswick reported by participants in total and by category (fuel and vehicle operation, groceries, food and beverages at restaurants and bars, and other retail spending) is listed in Table 4. Note that the averages are based on the numbers of participants reporting spending in a given category. All participants reported spending on fuel and vehicle operation, and the majority reported spending on food and beverages bought either at stores or at restaurants and bars. Other retail purchases while on same-day ATV tourism trips were mentioned by only 12 participants.

Average same-day ATV tourism trip spending was \$91.75, and nearly half of that was spent on fuel and vehicle operations.

The following table lists average per-person spending during same-day, out-of-town ATV trips in New Brunswick by NBATVF trail permit holders. Note that averages are based on the numbers of participants reporting spending in a given category.

Same-day NB ATV tourism trip spend per person	Average	Median	Range	Standard Deviation	Sample size (n)
Trip Spending per person – Total	\$51.88	\$50.00	\$5-\$140	\$26.42	92
Fuel	\$26.77	\$20.00	\$3-\$80	\$19.14	92
Restaurants	\$21.10	\$20.00	\$5-\$60	\$10.87	73
Groceries	\$12.06	\$10.00	\$2.5-\$50	\$7.93	83
Retail	\$18.75	\$9.17	\$2.5-\$50	\$17.24	12

Table 5: New Brunswick resident NBATVF trail permit holders' average same-day ATV tourism trip spending per person, by spending category

The following table lists the total spending by New Brunswick resident NBATVF trail permit holders' travel parties while on same-day, out-of-town ATV trips in New Brunswick over the 12 months prior to June 2011. These totals are based on their reported average and peak seasonal spends, and the number of reported trips per season.

Total NB ATV tourism trip spending per party, past 12 months	Average	Median	Range	Standard Deviation	Sample size (n)
Trip Spending per party – Total	\$1,653	\$1,167	\$25-\$8,100	\$1826.5	85
Fuel	\$667	\$420	\$20-\$3,600	\$695	85
Restaurants	\$662	\$420	\$30-\$3,750	\$836	67
Groceries	\$397	\$220	\$5-\$2,800	\$545	76
Retail	\$769	\$585	\$15-\$2,600	\$795	12

Table 6: New Brunswick resident NBATVF trail permit holders' annual total same-day ATV tourism trip spending per party and by spending category in 2010-2011

The following chart depicts total ATV tourism trip spending per party by season, based on New Brunswick resident NBATVF trail permit holders' reported trips per season and their reported average and peak seasonal spends.

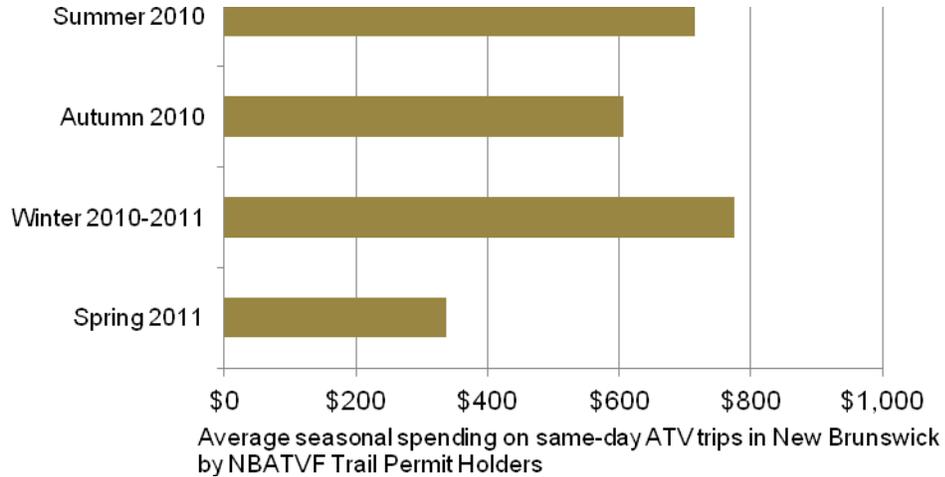


Figure 3: Average total spending by New Brunswick resident NBATVF trail permit holders while on same-day ATV tourism trips in New Brunswick, by season

The following table lists estimates of total annual same-day ATV tourism trip spending by New Brunswick resident NBATVF trail permit holders over the 12 month period prior to June 2011. Participants' reported spending was weighted to represent the total number of NBATVF trail permit holders based on the method described in the procedure section.

Total estimated same-day ATV tourism trip spending by NB resident NBATVF trail permit holders	Sum	Weighted n
Total (past 12 months)	\$3,260,959	2,135
Fuel	\$1,316,157	1,973
Restaurants	\$1,029,724	1,555
Groceries	\$700,987	1,764
Retail	\$214,091	278

Table 7: Total estimated same-day ATV tourism trip spending by New Brunswick resident NBATVF trail permit holders in 2010-2011

Overnight trip spending

The following table lists estimates of total annual spending by New Brunswick resident NBATVF trail permit holders while on ATV tourism trips of one or more nights in New Brunswick over the 12 month period prior to June 2011. These weighted estimates are based on the numbers of such trips reported by 21 participants, and the number of nights in paid accommodations reported by 15 participants. The method of deriving and weighting of these estimates is described in the procedure section.

Total estimated ATV tourism trip spending by NB resident NBATVF trail permit holders on trips of one or more nights	Sum	Weighted n
Total (past 12 months)	\$535,032	544
Fuel	\$103,659	544
Restaurants	\$85,884	544
Groceries	\$51,901	544
Retail	\$87,997	544
Accommodations	\$205,591	495

Table 8: Total estimated spending by New Brunswick resident NBATVF trail permit holders while on ATV tourism trips of one or more nights in New Brunswick in 2010-2011

ATV Tourism Activities

This study of New Brunswick resident NBATVF trail permit holders' ATV tourism trip characteristics included questions about ATV trip motivations, anticipated level of ATV activity over the next five years, and, from a product development perspective, expectations about ATV trail infrastructure.

ATV trip motivations

Participants were asked about the reasons that they took out-of-town ATV trips in New Brunswick. Participants were free to cite as many reasons as they wished. The majority of responses (58%) reflected interest in the pleasure of ATVing itself, and recreation in the outdoors. A quarter of responses referred to the social aspects of ATVing, including spending time with friends and family. Eleven percent of responses referred to visiting specific destinations of interest.

Only four percent of responses referred to hunting and fishing despite reported ATV use for hunting and fishing by 16% of participants overall and 61% of participants who went on ATV tourism trips within the past year. However, since the question was phrased around ATV tourism trips, this finding may reflect the distinction participants held between recreational ATV trips and hunting or fishing trips.

The 2% of 'other' responses referred to trips to just 'get away,' and in one case, to participate in trail maintenance.

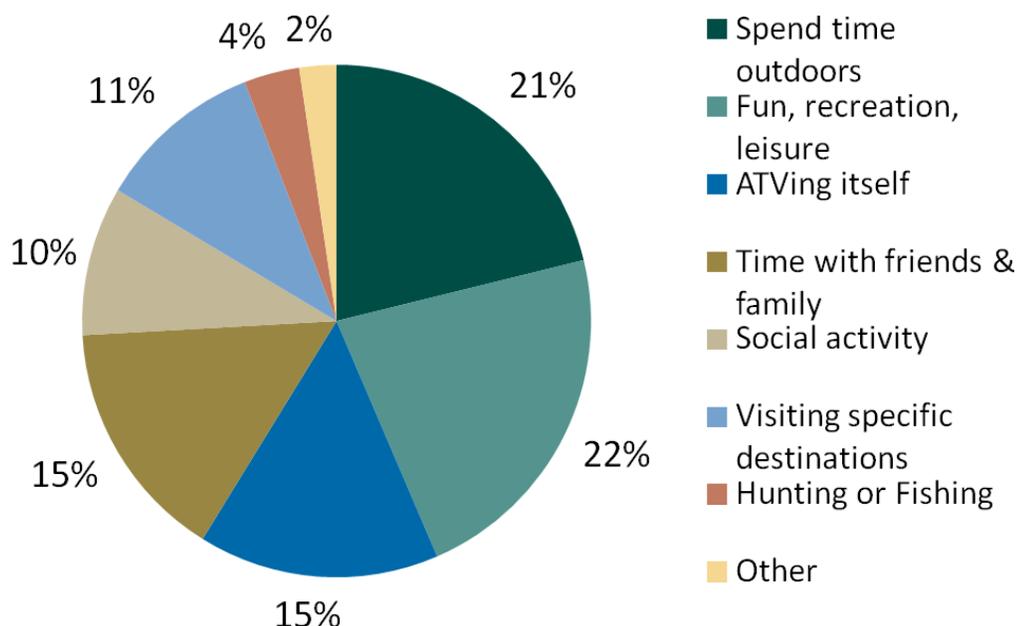


Figure 4: Percentages of mentions of motivations for taking ATV tourism trips in New Brunswick, by NBATVF trail permit holders in 2010-2011

Anticipated level of ATV activity over the next five years

Participants who had taken out-of-town, ATV tourism trips in New Brunswick within the past 12 months (either same-day or trips of one or more nights) were asked about their anticipated level of such ATV tourism activity over the next five years (see Table 9). On the balance, 27% of participants were anticipating an increase in their level of ATV tourism over the next five years.

Expected level of ATV activity, next five years	Percent of respondents (n=104)
Increase	38.5%
Remain the same	50%
Decrease	11.5%
Balance	+27

Table 9: Expected level of ATV activity over the next five years, by New Brunswick resident NBATVF trail permit holders who took ATV tourism trips in 2010-2011

Participants were prompted to cite reasons why they expected to increase or decrease their level of ATV tourism activity over the next five years. Expectations about access to trails led 12 participants to anticipate increases in ATV activity, while 4 participants cited the lack of access to trails as a reason why they might decrease their level of ATV activity over the next five years. Other reasons cited for anticipated increases in ATV activity included more time (6 mentions), retirement (4 mentions), and simply the enjoyment of ATVing (5 mentions). Anticipated decreases in ATV activity over the next five years were due to age, health, or family reasons (7 mentions), cost of gas (1 mention), and the possible sale of one participant's ATV.

Participants were asked about the effect that access to more club or ATV federation trails might have on their level of ATV activity. On the balance, 74% of participants indicated that they would increase their level of ATV activity if there was greater access to club or ATV federation trails (see Table 10).

Expected level of ATV activity, if there were more trails	Percent of respondents (n=104)
Increase	77%
Remain the same	19%
Decrease	2%
Cease completely	1%
Don't know	1%
Balance	+74

Table 10: Anticipated level of ATV activity if more club or ATV federation trails were accessible, for New Brunswick resident NBATVF trail permit holders who took ATV tourism trips in 2010-2011

Facilities expected from club or ATV federation trails

Participants were asked what types of facilities or services they expected to be provided by club or ATV federation trails. Most of the listed facilities were of interest to the majority of participants, with only showers, play areas, and rentals being of interest to less than 50% of participants in this study. Percentages of participants expressing interest in each facility or service are shown in the following chart.

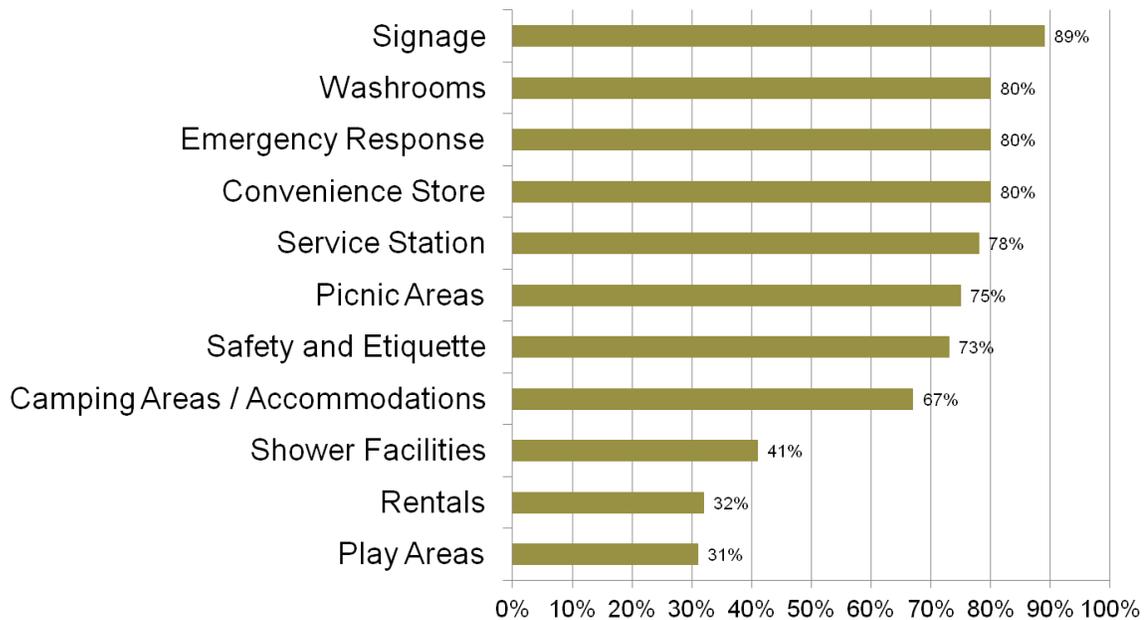


Figure 5: Percentages of New Brunswick resident NBATVF trail permit holders who took ATV tourism trips in 2010-2011 expecting listed facilities or services from club or ATV federation trails (n=97).

ATV Tourism Economic Impact

Economic model inputs

The following table lists the total estimated spending by New Brunswick resident NBATVF trail permit holders while on out-of-town recreational ATV trips in New Brunswick, same-day and overnight, over the 12 month period prior to June 2011.

As noted in the previous sections, participants were only asked about spending while on these ATV tourism trips. No local expenditures were included for vehicles, clothes, insurance, storage, or other costs associated with ATV ownership, local recreational use, or work use.

NBATVF trail permit costs were included, based the estimated 2,135 trail permit holders who took ATV tourism trips and the \$75 cost for a season pass.

Category of visitor spending	Total same-day trip spending	Total overnight trip spending	Total
Accommodations	-	\$205,591	\$205,591
Fuel	\$1,316,157	\$103,659	\$1,419,816
Restaurants	\$1,029,724	\$85,884	\$1,115,608
Groceries	\$700,987	\$51,901	\$752,888
Retail	\$214,091	\$87,997	\$302,088
Total	\$3,260,959	\$535,032	\$3,795,991
NBATVF trail permits			\$160,125
Total including trail permits			\$3,956,116

Table 11: Total estimated spending by New Brunswick resident NBATVF trail permit holders while on ATV tourism trips (same day and overnight) in New Brunswick over the 12 month period before June 2011

In addition to this visitor spending, NBATVF trail development projects and operational expenditures were essential to provide for a safe ATV trail infrastructure and tourism product.

The following table lists categorized trail development and operational expenditures by the NBATVF in 2010, to provide for the 2010-2011 ATV tourism season.

Category of NBATVF expenditure	Total expenditure
Trail development and repairs	\$2,063,397
Wages and salaries	\$195,883
Management fees including equipment and trail leases	\$10,332
Marketing and promotion	\$27,696
Telephone	\$13,599
Travel	\$131,126
Professional fees and services including GPS mapping and training	\$24,642
Insurance	\$79,551
Total	\$2,546,226

Table 12: Categorized trail development and operational expenditures by the NBATVF in 2010, in support of ATV trail development and tourism product infrastructure

Economic impact model

The tourism economic impact model used in this study was based on Statistics Canada's provincial input-output tables⁸. The I-O tables provide a comprehensive account of national and provincial economic structure and activity.

The categorized visitor spending estimates produced in this study (assumed to be in 2010 dollars) were input against the appropriate provincial industry categories, as were NBATVF trail development and operational expenditures. Inflation and taxation structures set in the model were current to 2010.

From these, the model provided estimates of direct and indirect economic impacts on provincial Gross Domestic Product (provincial GDP, or Gross Provincial Product), labour income, employment, and taxes within the province.

Direct economic impacts result from the expenditures described in the previous sections, while indirect economic impacts refer to the intermediate economic activities required to produce the goods and services to supply the tourism demands identified from the direct economic impacts⁹.

The tourism economic impact model used in this study also provides for estimates of 'induced' economic impacts, over and above the direct and indirect impact estimates derived from the underlying Statistics Canada industrial Input-Output tables. Induced economic impacts assume that, in supplying the demand generated by ATV tourism, incremental economic activity generates more spending and another round of economic impacts. For a more conservative estimate of economic impact avoiding the assumption of induced economic impacts, one may consider only the direct and indirect GDP impacts derived from the I-O tables.

⁸ Statistics Canada (2010). Provincial Input-Output Tables. Retrieved on March 11, 2012, from <http://www.statcan.gc.ca/bsolc/olc-cel/olc-cel?catno=15F0042X&lang=eng>

⁹ The total value of the production of goods and services in the provincial economy (valued at market prices) is influenced by the level of imports required to meet demand. Where New Brunswick cannot produce all of the goods required to provide for the estimated demand from ATV tourism, those economic impacts leak outside the province and into the Canadian economy (or beyond). Therefore, GDP is typically lower than direct expenditures.

Economic Impacts

Visitor Spending

The following table lists the economic impacts on New Brunswick's economy from the estimated total of \$3.96 million in visitor spending by New Brunswick resident NBATVF trail permit holders while on ATV tourism trips in the province in 2010-2011.

ATV tourism economic impacts	
Total ATV visitor spending	\$3,956,116
Gross sales	\$7,219,326
	Direct
	\$3,956,116
	Indirect
	\$1,393,135
Value added (to provincial GDP)	\$2,521,444
	Direct
	\$1,006,034
	Indirect
	\$631,316
Jobs sustained (full time equivalent person-years of employment)	53.6
	Direct
	21.1
	Indirect
	14.1
Taxes	\$908,316
Federal	\$524,525
	Direct and Indirect only
	\$337,286
Provincial	\$330,591
	Direct and Indirect only
	\$205,286
Municipal	\$53,201
	Direct and Indirect only
	\$34,210

Table 13: Estimated economic impacts of New Brunswick resident NBATVF trail permit holders' spending while on ATV tourism trips (same day and overnight) in New Brunswick in 2010-2011

This ATV tourism spending was estimated to produce a total gross sales volume of \$7.2 million (total economic activity generated by tourism expenditures by New Brunswick resident NBATVF trail permit holders, 2010-2011).

The total economic impact of this ATV tourism visitor spending on the province's GDP was calculated at \$2.5 million (\$1.6 million based on direct and indirect economic impacts alone).

This level of economic activity would sustain an estimated 54 full-time equivalent jobs (person years of employment), based on provincial average weekly wages in the industries affected by this ATV tourism demand.

The majority of tax revenues generated from this ATV tourism visitor spending accrued to the federal level of government, while the province received an estimated \$330,591. Municipal governments received an estimated \$53,201, mostly through business and property taxes.

Trail development and operational expenditures

The following table lists estimates of economic impacts from NBATVF expenditures on trail development projects in 2010, along with operational expenditures.

ATV trail development and operational economic impacts	
Total NBATVF expenditures	\$2,546,226
Gross sales	\$4,956,421
Direct	\$2,546,226
Indirect	\$814,995
Value added (to provincial GDP)	\$2,379,923
Direct	\$1,071,083
Indirect	\$532,634
Jobs sustained (full time equivalent person-years of employment)	52.2
Direct	23.9
Indirect	11.7
Taxes	\$959,624
Federal	\$562,720
Direct and Indirect only	\$398,017
Provincial	\$339,829
Direct and Indirect only	\$228,991
Municipal	\$57,075
Direct and Indirect only	\$40,370

Table 14: Estimated economic impacts of NBATVF trail development and operational expenditures in 2010

Trail development and operational expenditures of \$2.5 million was estimated to produce a total gross sales volume of \$4.96 million.

The total economic impact of this ATV tourism visitor spending on the province's GDP was calculated at \$2.4 million (\$1.6 million based on direct and indirect economic impacts alone).

This level of economic activity would sustain an estimated 52 full-time equivalent jobs (person years of employment), based on provincial average wages in the industries affected by these capital infrastructure and operational expenditures.

The majority of tax revenues generated from these expenditures accrued to the federal level of government, while the province received an estimated \$340,000. Municipal governments received an estimated \$57,000, mostly through business and property taxes.

Combined trail development and operational expenditures, and visitor spending

The following table lists estimates of economic impacts from NBATVF expenditures on trail development projects in 2010, along with operational expenditures.

Total combined trail development, operational, and visitor spending	
Total NBATVF expenditures	\$6,502,342
Gross sales	\$12,175,747
Direct	\$6,502,342
Indirect	\$2,208,130
Value added (to provincial GDP)	\$4,901,367
Direct	\$2,077,117
Indirect	\$1,163,950
Jobs sustained (full time equivalent person-years of employment)	105.8
Direct	45.0
Indirect	25.8
Taxes	\$1,867,940
Federal	\$1,087,940
Direct and Indirect only	\$735,303
Provincial	\$670,419
Direct and Indirect only	\$434,277
Municipal	\$110,276
Direct and Indirect only	\$74,580

Table 15: Estimated economic impacts of NBATVF trail development and operational expenditures in 2010, combined with New Brunswick resident NBATVF trail permit holders' spending while on ATV tourism trips (same day and overnight) in New Brunswick in 2010-2011

Combined trail development, operational expenditures, and ATV visitor spending of \$7.2 million was estimated to produce a total gross sales volume of \$12.2 million.

The total economic impact of these expenditures on the province's GDP was calculated at \$4.9 million (\$3.2 million based on direct and indirect economic impacts alone).

This level of economic activity would sustain an estimated 106 full-time equivalent jobs (person years of employment), based on provincial average wages in the industries affected by these capital infrastructure and operational expenditures.

The majority of tax revenues generated from these expenditures accrued to the federal level of government, while the province received an estimated \$670,419. Municipal governments received an estimated \$110,276, mostly through business and property taxes.

Discussion

This study focused strictly on ATV tourism in New Brunswick, by New Brunswick resident NBATVF trail permit holders. Local expenditures related to ATV ownership and operation were excluded from this analysis.

This study provided estimates to indicate that in the 12 months prior to June 2011, 2,135 New Brunswick resident NBATVF trail permit holders took 34,000 same-day trips covering 3.6 million kilometers in the province on same-day, out-of-town recreational ATV trips. Further, an estimated 544 New Brunswick resident NBATVF trail permit holders spent 2,373 nights on overnight ATV tourism trips in the province.

While on these ATV tourism trips in New Brunswick, New Brunswick resident NBATVF trail permit holders spent nearly 3.8 million dollars. Much of the ATV tourism spending was for fuel and vehicle operation (\$1.4 million), but New Brunswick restaurants and bars benefited from an estimated \$1.1 million in ATV tourism visitor spending. New Brunswick businesses selling groceries and other retail items also received approximately \$1 million in ATV tourism visitor spending. New Brunswick resident NBATVF trail permit holders who took overnight ATV tourism trips in the province spent nearly \$206,000 in New Brunswick accommodations.

This ATV tourism visitor spending including NBATVF trail permit sales generated a total sales volume of 7.2 million dollars, and the value added to the provincial economy from this ATV tourism visitor spending was estimated at 2.5 million dollars. Provincial tax revenues were estimated at \$330,591.

This level of ATV tourism activity by New Brunswick resident NBATVF trail permit holders is likely to be sustained, with 77% of those surveyed indicating that they planned to maintain or increase their level of ATV activity over the next five years. The same percentage (77%) indicated that they would increase their level of ATV activity if they had greater access to club or ATV federation trails. Trail access was the most cited consideration by the New Brunswick resident NBATVF trail permit holders surveyed, with respect to their anticipated level of ATV activity over the next five years. They had considerable expectations for club or ATV federation trails, however, with a majority of participants expecting not only the basics of safety, signage, washrooms, and emergency response but also service stations, convenience stores, and camping and picnic areas.

In addition to ATV visitor spending, this analysis included expenditures by the NBATVF for trail development and operations in 2010, to provide infrastructure and services for the 2010-2011 ATV tourism season. Capital expenditures by the NBATVF (with the support of the provincial government and the National Trails Coalition) were significant, totaling \$2.1 million in trail development projects. This accounted for the majority of total capital and operational expenditures of \$2.5 million.

NBATVF trail development and operational expenditures in 2010, combined with annual New Brunswick resident trail permit holder visitor spending generated a total sales volume of \$12.2 million dollars, and the value added to the provincial economy from this ATV tourism visitor spending was estimated at \$4.9 million dollars. Provincial tax revenues were estimated at \$670,419.

Appendix 1: Numbers of New Brunswick resident NBATVF trail permit holders surveyed, by New Brunswick county of residence and NBATVF club membership.

NBATVF member club number	Number of NB resident trail permit holders contacted
13030	25
13040	15
13060	5
23020	10
23040	23
23060	5
23070	13
33010	5
33030	6
33040	6
33070	16
33080	41
33090	6
33100	12
43040	1
43060	6
43070	1
53010	25
53020	6
53040	2
53050	5
53060	4
53070	1
53080	10
53100	1
53110	2
53130	22
53150	30
53190	1
63010	1
63020	5
63060	2
73010	2
73030	4
73040	44
73050	1
73060	13

73070	1
73080	4
73090	5
73110	5
73140	7
73150	1
Total	400

New Brunswick County	Number of NB resident trail permit holders contacted
Saint John County	4
Charlotte	4
Sunbury	6
Kings	10
Albert	18
Westmorland	54
Kent	29
Nothumberland	9
York	19
Carleton	51
Victoria	22
Madawaska	23
Restigouche	33
Gloucester	104
Not Available	14
Total	400

Appendix 2: Survey Instrument

New Brunswick ATV Tourism Survey 2011

Hello, may I please speak with **[Name from the trail permit list provided by the NBATVF, where the contact has clearly indicated permission to contact them for research]** ?

Hello, my name is _____. I am with the New Brunswick Department of Tourism and Parks, and I am calling on behalf of the New Brunswick All Terrain Vehicle Federation for a survey that we are conducting about recreational ATViing in New Brunswick. You had indicated on your NB ATV Trail Pass that you could be contacted for this survey. The survey will take approximately 15 to 20 minutes, all information will be held in strict confidence, and you will not be asked to purchase anything.

May I start the survey now?

- 1 = YES (CONTINUE)
- 2 = NO TIME NOW (ARRANGE CALLBACK)
- 3 = ALREADY TOOK A NB SURVEY [RECORD SAMPLE RECORD THANK AND TERMINATE]
- 3 = REFUSE (TRY PERSUADERS. THANK & TERMINATE IF THEY STILL REFUSE.)

Section 1: Screening

Q1. To begin, are you 18 years of age or older?

- 1 = Yes
- 2 = No [THANK AND TERMINATE]
- 96 = Refused / Declined

Q2. Did you go on any ATV trips in New Brunswick in the past 12 months?

- 1 = Yes
- 2 = No [THANK AND TERMINATE]
- 96 = Don't know / Refusal

**Q3. Were any of your New Brunswick ATV trips this year for recreation?
[non-work-related ATV trips]**

- 1 = Yes
- 2 = No [THANK AND TERMINATE]
- 96 = Don't know / Refusal

Q4. Were any of those recreational New Brunswick ATV trips this year out-of-town trips? [places in New Brunswick outside of local area, for example, a recreational ATV trip to the Fundy Park area, from Moncton]

- 1 = Yes
- 2 = No [THANK AND TERMINATE]
- 96 = Don't know / Refusal

I would like to ask you about your out-of-town recreational trips to go ATVing in New Brunswick over the past year.

First, I'll ask some questions about your same-day trips.

Then, I'll ask about any overnight or longer trips that you have taken in the past year, to go ATVing in New Brunswick.

Section 2: Same-Day Out-of-Town New Brunswick ATV Leisure Trips
--

Q5. Thinking about your SAME-DAY recreational, out-of-town ATV trips in New Brunswick this year...

Q5a. How many SAME-DAY trips have you taken so far this Spring, in April and May? [PROBE FOR APPROXIMATE ANSWER]

_____ Same-day Spring Trips 0 = No same-day trips 96 = Don't know / Refusal

Q5b. How many SAME-DAY trips did you take this past Winter, from November 2010 to March 2011? [PROBE FOR APPROXIMATE ANSWER]

_____ Same-day Winter Trips 0 = No same-day trips 96 = Don't know / Refusal

Q5c. How many SAME-DAY trips did you take this past Fall, in September and October 2010? [PROBE FOR APPROXIMATE ANSWER]

_____ Same-day Fall Trips 0 = No same-day trips 96 = Don't know / Refusal

Q5d. How many SAME-DAY trips did you take in the Summer of 2010, from June to August 2010? [PROBE FOR APPROXIMATE ANSWER]

_____ Same-day Summer Trips 0 = No same-day trips 96 = Don't know / Refusal

[IF NO SAME DAY ATV TRIPS REPORTED IN Q5a – Q5d, THEN SKIP TO SECTION 3]

**Q6. Concerning these SAME-DAY trips, where did you go in New Brunswick?
[DO NOT READ LIST; CHECK ALL MENTIONS]**

- | | |
|--|---|
| 01 = Upper-Madawaska (Lac Baker) | 31 = Sussex / Hampton / Quispamsis |
| 02 = Edmundston | 32 = Kings County |
| 03 = Saint-Anne-de-Madawaska | 33 = Saint John (City) |
| 04 = Grand Falls | 34 = St. Martins |
| 05 = Madawaska County | 35 = Saint John County |
| 06 = Saint-Quentin / Kedgwick | 36 = Musquash / Brown's Flat / Blacks Harbour |
| 07 = Campbellton | 37 = St. George / St. Andrews / St. Stephen |
| 08 = Dalhousie | 38 = Grand Manan / Campobello / Deer Island |
| 09 = Restigouche County | 39 = Charlotte County |
| 10 = Belledune / Petit-Rocher / Beresford | 40 = Gagetown / Cambridge Narrows |
| 11 = Bathurst | 41 = Queens County |
| 12 = Grande-Anse / Caraquet / Paquetville | 42 = Rusagonis / Oromocto / Tracy / Fredericton Junction / Geary / Gagetown |
| 13 = Shippagan / Lameque / Miscou | 43 = Minto / Chipman |
| 14 = Tracadie-Sheila / Saint-Isidore | 44 = Sunbury County |
| 15 = Gloucester County | 45 = McAdam / Harvey |
| 16 = Négouac | 46 = Fredericton |
| 17 = Miramichi | 47 = Stanley / Millville |
| 18 = Blackville / Doaktown | 48 = Kingsclear |
| 19 = Rogersville | 49 = Nackawic |
| 20 = Baie-Sainte-Anne | 50 = York County |
| 21 = Northumberland County | 51 = Woodstock |
| 22 = Kouchibouguac / Pointe-Sapin / Saint-Ignace / St-Louis / Richibucto | 52 = Florenceville-Bristol / Bath |
| 23 = Bouctouche / Saint-Antoine / Cocagne | 53 = Carleton County |
| 24 = Kent County | 54 = Perth-Andover / Plaster Rock |
| 25 = Shediac / Cap-Pelé / Port-Elgin | 55 = Victoria County |
| 26 = Moncton / Dieppe / Riverview | 56 = Other: _____ |
| 27 = Memramcook / Sackville | 96 = Don't know/Refusal |
| 28 = Westmorland County | |
| 29 = Salisbury / Petitcodiac / Hillsborough / Riverside-Albert | |
| 30 = Albert County | |

Q7. Is there a season when you travel further on SAME-DAY ATV trips, compared to your overall average?

- 1 = Yes
2 = No [**SKIP TO Q8a**]
96 = Don't know / Refusal

Q7a. In which season do you travel furthest on SAME-DAY ATV trips in New Brunswick?

[DO NOT READ LIST; SELECT ONLY ONE SEASON]

- 01 = Spring
02 = Summer
03 = Fall
04 = Winter
96 = Don't know/Refusal

**Q7b. During the [INSERT SEASON FROM Q7a] season when you take your furthest ATV trips in New Brunswick, how far do you travel on a SAME-DAY ATV trip?
[PROBE FOR APPROXIMATE ANSWER.
IF THE RESPONDENT PROVIDES AN ESTIMATE IN HOURS, RECORD THE NUMBER OF HOURS AND PROBE FOR AN APPROXIMATE DISTANCE.
LEAVE DISTANCE BLANK IF THEY CANNOT ESTIMATE THE DISTANCE.]**

_____ Distance _____ Hours

96 = Don't Know/Refusal

Q8a. Over the past 12 months, how far have you travelled on a typical SAME-DAY trip in New Brunswick on your ATV?

**[PROBE FOR APPROXIMATE ANSWER.
IF THE RESPONDENT PROVIDES AN ESTIMATE IN HOURS, RECORD THE NUMBER OF HOURS AND PROBE FOR AN APPROXIMATE DISTANCE]**

_____ Distance _____ Hours

96 = Don't Know/Refusal

Q8b. Record measuring unit: [If kilometres or miles not specified, ask]

1 = Kilometres

2 = Miles

96 = Refusal

My next questions are about the average costs associated with SAME-DAY ATV trips that you have taken in New Brunswick over the past 12 months.

We would like to determine the costs incurred by you and your household, such as your spouse or the children that accompanied you – basically, the people in your immediate travel party that you shared expenses with.

Q9. Generally, during a typical SAME-DAY ATV trip in New Brunswick, how many people travel with you, including yourself?

96 = Refusal

Q10. On average, during one of your SAME-DAY ATV trips in New Brunswick, how much did you and other members of your household spend on purchasing gas or oil in New Brunswick, including gas for the ATV, car, truck...?

96 = Don't know / Refusal

Q11. On average, during one of your SAME-DAY ATV trips in New Brunswick, how much did you and other members of your household spend at restaurants and bars?

96 = Don't know / Refusal

Q12. On average, during one of your SAME-DAY ATV trips in New Brunswick, how much did you and other members of your household spend on purchasing groceries in New Brunswick (water, soft drinks, food, alcoholic beverages)?

96 = Don't know / Refusal

Q13. On average, during one of your SAME-DAY ATV trips in New Brunswick, how much did you and other members of your household spend on renting a car, ATV, and/or other transportation equipment in New Brunswick?

96 = Don't know / Refusal

Q14. On average, during one of your SAME-DAY ATV trips in New Brunswick, how much did you and other members of your household spend on any other retail purchases?

96 = Don't know / Refusal

Q15a. Is there a season when you spend more during your SAME-DAY ATV Trips in New Brunswick?

1 = Yes

2 = No [SKIP TO Q16]

96 = Don't know / Refusal

**Q15b. In which season do you spend more on SAME-DAY ATV trips?
[DO NOT READ LIST; SELECT ONLY ONE SEASON]**

01 = Spring

02 = Summer

03 = Fall

04 = Winter

96 = Don't know/Refusal

Q16. On average, during one of your SAME-DAY ATV trips in New Brunswick during the [Insert Season from Q15b], how much did you and other members of your household spend on purchasing gas or oil in New Brunswick, including gas for the ATV, car, truck...?

96 = Don't know / Refusal

Q17. On average, during one of your SAME-DAY ATV trips in New Brunswick during the [Insert Season from Q15b], how much did you and other members of your household spend at restaurants and bars?

96 = Don't know / Refusal

Q18. On average, during one of your SAME-DAY ATV trips in New Brunswick during the [Insert Season from Q15b], how much did you and other members of your household spend on purchasing groceries in New Brunswick (water, soft drinks, food, alcoholic beverages)?

96 = Don't know / Refusal

Q19. On average, during one of your SAME-DAY ATV trips in New Brunswick during the [Insert Season from Q15b], how much did you and other members of your household spend on renting a car, ATV, and/or other transportation equipment in New Brunswick?

96 = Don't know / Refusal

Q20. On average, during one of your SAME-DAY ATV trips in New Brunswick during the [Insert Season from Q15b], how much did you and other members of your household spend on any other retail purchases?

96 = Don't know / Refusal

Section 3: Overnight Out-of-Town New Brunswick ATV Leisure Trips

Q21. In the past 12 months, have you taken any out-of-town trips of one or more nights to go ATVing in New Brunswick?

This could be travelling on your ATV on an overnight trip, or it could be a trip of one or more nights where you travelled to a place in New Brunswick for the main reason of ATVing.

1 = Yes

2 = No **[SKIP TO SECTION 4]**

96 = Refused / Declined **[SKIP TO SECTION 4]**

Q21a. How many trips of one or more nights did you take so far this Spring, in April and May? [PROBE FOR APPROXIMATE ANSWER]

_____ Overnight Spring Trips 0 = No overnight trips 96 = Don't know / Refusal

Q21b. How many trips of one or more nights did you take this past Winter, from November 2010 to March 2011? [PROBE FOR APPROXIMATE ANSWER]

_____ Overnight Winter Trips 0 = No overnight trips 96 = Don't know / Refusal

Q21c. How many trips of one or more nights did you take this past Fall, in September and October 2010? [PROBE FOR APPROXIMATE ANSWER]

_____ Overnight Fall Trips 0 = No overnight trips 96 = Don't know / Refusal

Q21d. How many trips of one or more nights did you take in the Summer of 2010, from June to August 2010? [PROBE FOR APPROXIMATE ANSWER]

_____ Overnight Summer Trips 0 = No overnight trips 96 = Don't know / Refusal

Q22a. In total, for all of those ATV trips of one or more nights that you took in New Brunswick in the past 12 months, how many nights in total did you spend out of town?

_____ Nights spent out of town ATVing

96 = Don't know / Refusal

Q22b. And now, of these out-of-town trips, how many NIGHTS was your LONGEST trip?

_____ Nights

96 = Don't know / Refusal

Q22c. In which month was your LONGEST trip? [DO NOT READ LIST. SELECT ONLY ONE RESPONSE]

- 1 = January
- 2 = February
- 3 = March
- 4 = April
- 5 = May
- 6 = June
- 7 = July
- 8 = August
- 9 = September
- 10 = October
- 11 = November
- 12 = December

Q22d. During these ATV trips of one or more nights, what types of accommodations did you stay in? [DO NOT READ LIST. CHECK ALL MENTIONS]

- 1 = Hotel
- 2 = Motel
- 3 = Chalet
- 4 = Inn / Bed & Breakfast
- 5 = Lodge / Outfitter
- 6 = Private or Commercial Cottage
- 7 = Campground
- 8 = With family or friends
- 96 = Don't Know/Refusal

[IF NO PAID ACCOMMODATIONS REPORTED IN Q22d, THEN SKIP TO Q23a]

Q22e. You mentioned that you stayed in paid accommodations during ATV trips of one or more nights in New Brunswick. How many nights did you spend in paid accommodations on ATV trips in New Brunswick in the past 12 months?

_____ Nights

96 = Don't know / Refusal

Q23. Concerning these trips of one or more nights, in which tourism regions of New Brunswick did you go? [DO NOT READ LIST. CHECK ALL MENTIONS]

- | | |
|---|-----------------------------------|
| 01 = Upper-Madawaska (Lac Baker) | 43 = Minto / Chipman |
| 02 = Edmundston | 44 = Sunbury County |
| 03 = Saint-Anne-de-Madawaska | 45 = McAdam / Harvey |
| 04 = Grand Falls | 46 = Fredericton |
| 05 = Madawaska County | 47 = Stanley / Millville |
| 06 = Saint-Quentin / Kedgwick | 48 = Kingsclear |
| 07 = Campbellton | 49 = Nackawic |
| 08 = Dalhousie | 50 = York County |
| 09 = Restigouche County | 51 = Woodstock |
| 10 = Belledune / Petit-Rocher / Beresford | 52 = Florenceville-Bristol / Bath |
| 11 = Bathurst | 53 = Carleton County |
| 12 = Grande-Anse / Caraquet / Paquetville | 54 = Perth-Andover / Plaster Rock |
| 13 = Shippagan / Lameque / Miscou | 55 = Victoria County |
| 14 = Tracadie-Sheila / Saint-Isidore | 56 = Other: _____ |
| 15 = Gloucester County | 96 = Don't know/Refusal |
| 16 = Néguaac | |
| 17 = Miramichi | |
| 18 = Blackville / Doaktown | |
| 19 = Rogersville | |
| 20 = Baie-Sainte-Anne | |
| 21 = Northumberland County | |
| 22 = Kouchibouguac / Pointe-Sapin / Saint-Ignace / St-Louis / Richibucto | |
| 23 = Bouctouche / Saint-Antoine / Cocagne | |
| 24 = Kent County | |
| 25 = Shediac / Cap-Pelé / Port-Elgin | |
| 26 = Moncton / Dieppe / Riverview | |
| 27 = Memramcook / Sackville | |
| 28 = Westmorland County | |
| 29 = Salisbury / Petitcodiac / Hillsborough / Riverside-Albert | |
| 30 = Albert County | |
| 31 = Sussex / Hampton / Quispamsis | |
| 32 = Kings County | |
| 33 = Saint John (City) | |
| 34 = St. Martins | |
| 35 = Saint John County | |
| 36 = Musquash / Brown's Flat / Blacks Harbour | |
| 37 = St. George / St. Andrews / St. Stephen | |
| 38 = Grand Manan / Campobello / Deer Island | |
| 39 = Charlotte County | |
| 40 = Gagetown / Cambridge Narrows | |
| 41 = Queens County | |
| 42 = Rusagonis / Oromocto / Tracy / Fredericton Junction / Geary / Gagetown | |

My next questions are about the costs associated with the LONGEST ATV trip that you made in New Brunswick, that is, the [Q22b] night trip that we talked about previously. We would like to determine the costs incurred by you and your household, such as your spouse or the children that accompanied you.

Q24. During this [Q22b] night ATV trip, how many people travelled with you, including yourself?

[NOTE: THIS IS THE IMMEDIATE TRAVEL PARTY FOR WHICH THE RESPONDENT CAN ESTIMATE TRAVEL EXPENSES. THIS IS NOT, FOR EXAMPLE, THE TOTAL NUMBER OF ATV ENTHUSIASTS PARTICIPATING IN A JAMBOREE , GROUP TOUR, ETC.]

96 = Refusal

Q25a. In total, what distance did you travel on this [Q22b] night ATV trip in New Brunswick? **[PROBE FOR APPROXIMATE ANSWER]**

_____ Distance

96 = Don't Know/Refusal

Q25b. Record measuring unit: [If kilometres or miles not specified, ask]

1 = Kilometres

2 = Miles

96 = Refusal

Q25c. Does this include the transportation of your ATV on a truck or a trailer?

[IF YES, ASK Q25d. IF NOT, SKIP TO Q26]

Q25d. During this [Q22b] night ATV trip in New Brunswick, how far did you travel on your ATV?

[PROBE FOR APPROXIMATE ANSWER.

IF THE RESPONDENT PROVIDES AN ESTIMATE IN HOURS, RECORD THE NUMBER OF HOURS AND PROBE FOR AN APPROXIMATE DISTANCE.

LEAVE DISTANCE BLANK IF THEY CANNOT ESTIMATE THE DISTANCE.]

_____ Distance _____ Hours

96 = Don't Know/Refusal

Q26. During this [Q22b] night ATV trip in New Brunswick, around how much did you and other members of your household spend in total on accommodations (hotel, motel, campground...)?

96 = Don't know / Refusal

Q27. During this [Q22b] night ATV trip in New Brunswick, around how much did you and other members of your household spend in total on purchasing gas or oil in New Brunswick, including gas for the ATV, car, truck....?

96 = Don't know / Refusal

Q28. During this [Q22b] night ATV trip in New Brunswick, around how much did you and other members of your household spend in total at restaurants and bars?

96 = Don't know / Refusal

Q29. During this [Q22b] night ATV trip in New Brunswick, how much did you and other members of your household spend in total on purchasing groceries in New Brunswick (water, soft drinks, food, alcoholic beverages)?

96 = Don't know / Refusal

Q30. During this [Q22b] night ATV trip in New Brunswick, around how much did you and other members of your household spend in total on renting a car, ATV or other transport equipment in New Brunswick?

96 = Don't know / Refusal

Q31. During this [Q22b] night ATV trip in New Brunswick, around how much did you and other members of your household spend in total on any other retail purchases?

96 = Don't know / Refusal

Section 4: Out-of-Town New Brunswick ATVing Characteristics

Q32. Now, thinking of all your ATV trips that we talked about previously that you've made in New Brunswick this year, whether they were same-day trips, overnight trips, or longer, what are the REASONS that motivated these trips? Would you say it was mainly to...? [READ LIST, CHECK ALL MENTIONS]

01 = Go ATVing

02 = Fun, recreation and/or leisure

03 = Spend time in the outdoors

04 = Engage in a social activity

05 = Spend time with friends or family

06 = Visit a specific tourism site

07 = Another reason (Specify: _____)

96 = Don't know/ Refusal

Q33a. Still considering out-of-town trips in New Brunswick, whether it's a same-day trip, an overnight trip or longer, how would you evaluate your level of ATV activity within the next 5 years? Will it...? [READ LIST, SELECT ONE ANSWER ONLY]

1 = Increase

2 = Remain the same

3 = Decrease

4 = Cease completely

96 = Don't know / Refusal

Q33b. Why do you say your level of ATV activity will _____ within the next 5 years? [DO NOT READ, CHECK ALL MENTIONS]

01 = Access to trails

02 = The cost of gas

03 = The cost of operating ATV

04 = Like ATVing

90 = Other (Specify: _____)

96 = Don't know / Refusal

Q33c. If there were more club or ATV federation trails available than there are now how do you think it would impact your level of ATV activity? Would it...?

- 1 = Increase
- 2 = Remain the same
- 3 = Decrease
- 4 = Cease completely
- 96 = Don't know / Refusal

Q33d. What facilities or amenities would you expect to be available from a club or ATV federation trail? [DO NOT READ LIST, CHECK ALL MENTIONS]

- 01 = Signage
- 02 = Rentals
- 03 = Service Station
- 04 = Convenience Store
- 05 = Camping Areas / Other Accommodations
- 06 = Washrooms
- 07 = Change rooms / Shower Facilities
- 08 = Picnic Areas
- 09 = Play Areas
- 10 = Emergency response
- 11 = Safety and etiquette
- 90 = Other (Specify: _____)

Q34. I now have a few questions to ask you about your ATV activity in general this year. First, did you mainly go ATVing as the driver or the passenger?

- 1 = Driver
- 2 = Passenger
- 3 = Both
- 96 = Don't know / Refusal

Q35a. Do you own or rent your ATV?

- 1 = Own
- 2 = Rent
- 3 = Other (borrow from friend or family member or other)
- 96 = Don't know / Refusal

Q35b. Do you use an ATV for your work or employment, as well as for recreation?

- 1 = Yes
- 2 = No
- 96 = Don't know / Refusal

Q35c. Do you use your ATV for hunting?

- 1 = Yes
- 2 = No
- 96 = Don't know / Refusal

Q35d. Do you also use snowmobiles?

- 1 = Yes
- 2 = No
- 96 = Don't know / Refusal

Section 5: Sociodemographics

For classification purposes, I now need to ask you a few additional questions.

Q37. Can you tell me in which age group you are... [READ LIST]

- 01 = 18 - 24 years of age
- 02 = 25 - 34 years of age
- 03 = 35 - 44 years of age
- 04 = 45 - 54 years of age
- 05 = 55 - 64 years of age
- 06 = 65 - 74 years of age
- 07 = 75 years of age or older
- 96 = Refusal

Q38. What is the highest level of education you have successfully completed? [Do NOT read list]

- 01 = Up to graduated high school
- 02 = Graduated high school/ vocational school
- 03 = Some community college/technical school
- 04 = Graduated community college/technical school
- 05 = Some university
- 06 = Graduated university
- 07 = Completed a masters or PhD (graduate school)
- 08 = Other: (Please specify: _____)
- 96 = Don't know / Refusal

Q39. Which of the following categories best describes your work status? [PLEASE SELECT ONE ANSWER ONLY]

- 1 = Working
- 2 = Retired
- 3 = A student
- 4 = A stay at home spouse or partner
- 5 = Currently seeking employment
- 6 = Other (Specify: _____)
- 96 = Refusal

Thank you for your participation.

Appendix 3: New Brunswick resident NBATVF Trail Permit Holder locations and ATV Trip Destinations

Legend	
	ATV destinations, and
	bounds around destinations
	NBATVF trail permit holder locations
	(note that size of symbol is relative to the number of trail permit holders at a given location)

