

The Economic Impact Of Snowmobile Trails In Ontario

2023



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About the Authors

Harry Cummings and Associates (HCA) is a planning and evaluation firm based in Guelph, Ontario, with a sister office in Kamloops, British Columbia. Since its inception in 1997, HCA has conducted over 200 projects across Canada and internationally. HCA has extensive experience working with municipal and regional planning bodies across Canada, providing services and expertise related to strategic planning, economic impact assessment, community economic development, and policy issues.

Dr. Harry Cummings is the founder and Director of HCA, a Registered Professional Planner, and the former President of the Canadian Evaluation Society (CES). He is an internationally respected expert in economic development and results-based management, program evaluation, regional and community economic analysis and regional development planning. As the Director of HCA, Dr. Cummings has managed up to 35 staff as part of integrated projects. He has managed large projects (\$40 million over 10 years) and small projects (\$2,000 over 1.5 months).

Dr. Cummings was a professor at the University of Guelph for over 30 years where he taught graduate-level courses in research methods, regional economics and program evaluation in the School of Environmental Design and Rural Development. He was jointly appointed to the Agricultural Economics and Rural Planning and Development departments. As a Professor at the University of Guelph, he supervised Ph.D. and Master's candidates in the planning, design, implementation, analysis, and development of strategies for regional and local economies in Canada and internationally. He has also designed and led numerous training workshops on topics such as healthy communities, program evaluation, survey design, and social return on investment.

To complete this project, HCA has assembled an experienced and dynamic project team, which collectively has over 50 years of professional research experience. Team consultants have degrees in planning, business and geography and have extensive experience in economic impact assessment, market research, land use planning, and stakeholder consultation. The project team members included: Dr. Harry Cummings (PhD), Dr. Tamrat Haile (PhD) and Patrick Kathoni (MSc.)

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

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Ministry of Tourism, Culture and Sport

Ontario Federation of Snowmobile Clubs

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

This organization is guided by the following mission and vision statements:

“Our Mission is to provide leadership to member organizations in our commitment to enable exceptional snowmobile trails and rider experiences throughout the province.”

“Our Vision is that snowmobiling is recognized and celebrated as Ontario’s premier winter recreation and tourism experience.”



More than 180 community-based OFSC member snowmobile clubs are organised into 16 operational districts which together operate more than 30,000 km of signed and groomed trails. Last year there were over 105,000 registered permits issued to snowmobilers and their families for use in Ontario.

The OFSC’s Board, comprised of the Executive and District Governors, meets throughout the year to set policy, undertake long-term planning, and oversee the provincial operations and budget on behalf of the clubs. As the coordinating body for organized snowmobiling in Ontario, the OFSC provides advice and guidance to member clubs on a broad range of topics to ensure provincial objectives are met. Proceeds from the sale of the trail permits required to enter OFSC trails provide primary funding for both the trail operations of local snowmobile clubs and their provincial organization.

Executive Summary

The Ontario Federation of Snowmobile Clubs (OFSC) has retained Harry Cummings and Associates Inc. (HCA) to assess the economic impact of snowmobile trails in Ontario during the 2022-2023 snowmobiling season. This study is an update to studies conducted by HCA in 2014 and 2019. The OFSC is a volunteer-led, not-for-profit association that provides its member organizations with a wide range of quality programs and services. The OFSC manages a provincial network of snowmobiling trails that connects Ontario communities and provides responsible riding experiences that are safe, enjoyable, and environmentally sustainable.

This study will be the sixth of its kind in Ontario, with the first economic impact study dating back to 1989. Studies from 1989 to 2014 found snowmobiling expenditures have steadily risen over the last 2-3 decades from \$241 million to \$853 million in direct spending; the 2019 study found a slight decline to 842.8 million in direct expenditures.

Given the consistent value that snowmobiling brings to the Ontario economy and the changes in the economic, social, and environmental landscape that can occur over a five-year period, the OFSC requested an update to the 2019 economic impact assessment. Using the same research methods as those used in 2014 and 2019, HCA surveyed snowmobilers and conducted discussions with OFSC governors and volunteers to determine the habits of snowmobilers and annual expenditures related to snowmobiling across the province. With this data, HCA was able to calculate the economic impact of snowmobiling using the Ontario Ministry of Tourism, Culture and Sport's Tourism Regional Economic Impact Model (TREIM). TREIM uses input-output methods and produces estimates of the direct, indirect and induced impacts of tourism-related activities on Gross Domestic Product (GDP), labour income and employment, as well as estimates of the direct and total impacts of tourism-related activities on federal, provincial and municipal tax revenues.

Survey results indicated that 46.9% of respondents were less active in snowmobiling during the 2022-2023 season compared to other seasons, likely due to poor weather conditions in many areas of Ontario. Despite the reported reduced snowmobiling activity, the 2022-2023 Ontario snowmobile season had \$1,481,341,545 in expenditures by snowmobilers riding in the province, which is a substantial increase from the 2019 expenditure of \$842,870,778. The increase in expenditure can possibly be attributed to a 15.5% increase in Canada's Consumer Price Index (CPI) between 2018 and 2022. The average price across all expenditures increased significantly; for instance, the average cost of snowmobile purchases reported by survey respondents increased by 50% from the 2019 study.

Snowmobiling expenditures from 2022-2023 contributed to \$704.6 million in direct GDP and \$1.13 billion in direct, indirect, and induced GDP impacts. Additionally, employment from the season's snowmobiling expenditures totalled an estimated 9,307 full-time equivalent jobs and \$538 million in taxes across three levels of government: \$238.9 million in federal taxes, \$258.16 million in provincial taxes, and \$40.98 million in municipal taxes.

In terms of total economic activity generated by the snowmobile industry, the assessment finds that \$1.48 billion in expenditures reported by survey respondents would generate an estimated \$3.0 billion in economic activity in the province in 2022-2023. [1] The overall economic impact in 2023 has doubled from the total economic impact of 2019 and 2014 studies, \$1.6 and \$1.7 billion annually, respectively. Furthermore, the two studies provide benchmarks by which we can measure the economic impact of snowmobiling during years with particularly good weather conditions (2013-2014) and years with unusually poor weather conditions (2018-2019). Therefore, the economic impact of OFSC Recreational

Prescribed Trails has the potential to generate between \$3 and \$6 billion for poor and suitable weather conditions, respectively, based on the 2023 expenditure and CPI status.

Studying the Economic Impact of Snowmobile Trails

A Review of Economic Impact Studies Completed in Ontario and Comparable Jurisdictions

Snowmobiling is one of the great winter past-times in North America and a favourite activity among Canadians, in particular. Since 1990, there have been four significant studies examining the economic impact of snowmobile trails in Ontario. These studies found that expenditures from the snowmobiling industry have been rising steadily over the last 30 years, with estimated expenditures from the snowmobiling industry increasing from \$241 million in 1988-1989 to \$853 million in 2013-2014. The following study conducted in 2019 found a slight decrease in expenditure from the 2014 levels (\$842,870,778) associated with short winters across the region. The current study found that in the 2022-2023 season, a significant increase to \$1,481,341,546 reestablished the increasing expenditure and economic impact trend of snowmobiling in Ontario, despite poor weather conditions.

Using input-output analysis three different areas of impact best measure the impact of snowmobiling: *direct*, *indirect*, and *induced impacts* on the local economy. *Direct impacts* measure the actual expenditures of snowmobilers; *indirect impacts* refer to the economic value contributed by suppliers to tourism, restaurants, and other service providers that sell to snowmobilers in Ontario; and *induced impacts* examine the expenditures of the employees and firms supported by the snowmobile industry itself. Using these measures, the 2014 study estimated that the \$853 million spent by snowmobilers in expenditures directly contributed to an increase of \$369 million in provincial GDP.

Overview of Previous Study Findings

This section provides a brief overview of the four major studies examining the economic impact of snowmobiling in the province, how they measured relevant snowmobiling expenditures, and how snowmobiling impacts the Ontario economy.

1990: Dr. Paul Eagles et al. – The first major economic impact assessment of the snowmobiling industry in Ontario was completed by Dr. Paul Eagles and his research team in 1990 during a significant growth period in the popularity of snowmobiling as a winter sport. This study examined data collected from a survey sent to 1,000 OFSC permit holders. The survey had a response rate of 43% (431 completed questionnaires) and included non-resident snowmobilers who had purchased permits for Ontario trails (Eagles, et. al., 1990). The survey respondents were comprised mostly of married men who owned an average of 1.8 sleds and had been participating in snowmobiling for 10 years or more.

The study measured the expenditures made on fixed and variable expenses they made or were planning on making in Ontario during the season. Fixed expenses were defined as those which are generally incurred once over a season, including: clothing and accessories, trailers, and insurance. Variable costs were defined as expenses incurred while on a snowmobile outing, including lodging, food, gas for the snowmobile and tow vehicle, as well as repairs.

The study found that OFSC members spent \$241 million over the 1988-1989 season, with just over two million reportedly spent in Ontario on fixed and variable items. The fixed expense for snowmobilers was the purchase and upkeep of a snowmobile, while the largest variable expense was found to be fuel costs (Eagles, et al., 1990).

1998: Winter Gold – The second major economic impact study on snowmobiling in Ontario was conducted in 1998 when OFSC and the Northern Ontario Heritage fund sponsored the preparation of “Winter Gold: The Report on the Economic Sustainability and Development in Ontario.” Like the previous report, this study focused on the fixed and variable expenditures of snowmobilers. However, unlike the

first report, this study used the Tourism Economic Assessment Model (TEAM) to measure the direct, indirect, and induced economic impacts of snowmobiling activities in the province. The reach of this study was also significantly greater than the first, with the survey sent to OFSC permit holders from Ontario (n=3,000), the United States (n=500), and adjacent provinces (n=185) (Ecologistics Limited, 1998).

This study found that snowmobilers spent around \$585 million in 1998. The majority of spending was on fixed expenditures (around \$399 million), and 70% of fixed costs were spent directly on snowmobiles. Respondents reported spending \$186 million on variable expenditures, such as: food and beverages, fuel, oil and repairs, and overnight expenditures. Approximately 25% of the variable expenditures went to fuel and oil and another 25% was spent on food and beverages while snowmobiling.

The study also reviewed a number of issues facing the snowmobiling industry in Ontario at the time, but ultimately concluded that organized snowmobiling had evolved beyond a localized recreational pursuit to an important industry in the province (Ecologistics Limited, 1998).

2005: Paula Neice & Associates – In 2005, Paula Neice and Associates conducted the third major economic impact assessment of the snowmobiling industry. Using the TEAM model, this study combined results from data collected from OFSC permit holders, insurance records, and data from the Ministry of Transportation to project the impact of snowmobiling activities on the Ontario economy. In the 2004-2005 season, survey results showed that the average OFSC member household owned 1-2 snowmobiles and that more than half of survey respondents lived in rural communities, with 25% of respondents having been involved in snowmobiling for more than 25 years (Paula Neice and Associates, 2005).

Financial results found that snowmobiling in Ontario generated over one billion dollars in economic activity throughout the province, with direct expenditures totalling \$637 million in the 2004-2005 season. The TEAM model was then used to calculate that the 2004-2005 snowmobiling season had generated \$17 million from the sale of 103,867 full- and short-term snowmobile permits. Additionally, snowmobiling in Ontario supported \$274.8 million in total tax revenue among the three levels of government. Direct employment from snowmobile expenditures resulted in 4,817 equivalent full-year jobs, primarily in the service industry, including jobs in restaurants and accommodation. Accounting for indirect and induced impacts, snowmobile-related expenditures in the province supported a total of 8,746 equivalent full-year jobs. This overall economic impact is based on a combined \$664 million in snowmobile-related expenditures by Ontario residents and the Ontario Federation of Snowmobile Clubs (Paula Neice and Associates, 2005).

2014: Harry Cummings & Associates – The 2014 economic impact assessment was conducted by Harry Cummings and Associates and can be considered a base year as a reference for the current study since it represented a typical or normal winter year. For this study, HCA sent a web survey to 60,000 OFSC permit holders – of which 4,588 surveys were completed – and conducted phone interviews with eight OFSC District Coordinators. Study results showed that snowmobilers spent over \$853 million in during the 2013-2014 season. Many of the respondents reported that they were more active in the 2013-2014 season than in previous years. Furthermore, it was estimated that the \$853 million in expenditures contributed to an increase of \$369.4 million in direct GDP and a total of \$731.3 million in provincial GDP, including direct, indirect, and induced GDP impacts.

This study also measured the impact of snowmobiling on job creation and estimated that the snowmobiling industry contributed to 11,307 jobs generated through both direct and induced employment in 2013-2014. Direct employment from the season's snowmobile expenditures was

measured at 7,292 full-year equivalent jobs. The snowmobiling industry also generated \$332.8 million in tax revenue across three levels of government (federal, provincial, and municipal).¹

The study concluded that the total economic activity generated by the \$853 million in expenditures could generate as much as \$1.7 billion in economic activity in the 2013-2014 season. (Estimates were calculated using a multiplier of 2.0 as suggested by the Ministry of Tourism, Culture and Sport).

2019: Harry Cummings & Associates – The most recent economic impact assessment was conducted five years ago by Harry Cummings and Associates. For this study, OFSC emailed approximately 88,000 individuals using an email database that included those who purchased an OFSC permit for 2018-2019, as well as previous permit holders going back five years. The survey was also shared through OFSC's social media platforms, reaching 15,000 individuals. The survey was open for three weeks between March 21 – April 11, 2019, to mirror the dates of the 2014 survey.

This study represented a low-frequency season with an average of only 8 weeks of active snowmobiling period, which decreased expenditure and economic impact compared to the 2014 season. The study results showed that snowmobilers spent over \$842 million during the 2018-2019 season. Many of the respondents reported that they were about the same or less active in the 2018-2019 season than in previous years. Furthermore, it was estimated that the \$842 million in expenditures contributed to an increase of \$404 million in direct GDP and \$665.7 million in provincial GDP, including direct, indirect, and induced GDP impacts.

This study also measured the impact of snowmobiling on job creation and estimated that the snowmobiling industry contributed to 6,436 jobs generated through both direct and induced employment in 2018-2019. Direct employment from the season's snowmobile expenditures was measured at 4,325 full-year equivalent jobs. The snowmobiling industry also generated \$216.4 million in tax revenue across three levels of government (federal, provincial, and municipal).²

The study concluded that the total economic activity generated by the \$842 million in expenditures could generate as much as \$1.68 billion in economic activity in the 2018-2019 season. (Estimates were calculated using a multiplier of 2.0 as suggested by the Ministry of Tourism, Culture and Sport).

Economic Impact of Snowmobiling in Comparable Jurisdictions

In addition to the Ontario studies, there have been many studies over the past few decades on the impact of snowmobiling in comparable jurisdictions across Canada and the USA. This section will highlight a few relevant studies conducted in Alberta (2011), Quebec (2012); Montana (2014); Idaho (2017); and Utah (2017), and country-wide data from the United States (2019). Like Ontario, these studies have demonstrated the value of snowmobiling to the respective provincial or state governments.

Snowmobiling in Alberta & Quebec – In 2011, Econometric Research Ltd. developed an input-output model to calculate the economic impact of snowmobiling in Alberta. Unlike the Ontario studies, no direct survey of snowmobilers was done in favour of using available secondary data. The study estimated that the total expenditures on snowmobiling and related activities in Alberta in 2009 exceeded \$366.5 million. The total impact on the economy using all multipliers was \$810 million. Expenditure estimates included

¹ With the federal government receiving \$185.5 million in taxes, followed by the provincial government with \$145.0 million, and municipal governments receiving \$2.3 million in tax dollars across the province.

² With the provincial government receiving \$114.2 million in taxes, followed by the federal government with \$92.1 million, and municipal governments receiving \$10.1 million in tax dollars across the province.

capital expenditures by snowmobilers and snowmobile clubs/associations (valued at \$111.7 million) and tourism expenditures (\$254.7 million). Not included in expenditure estimates was the money raised and spent by snowmobiling clubs/associations (i.e. permit sales). Based on these findings, the study concluded that more than 6,574 Albertans owe their full-time jobs to the recurrent capital and operational expenditures from the snowmobiling industry. Snowmobiling activities in 2009 alone contributed to an estimated \$213.9 million in wages and salaries. The study found that the economic impact of snowmobiling is greatest in rural regions of the province where the sport is more prevalent. In these areas, snowmobiling has developed into a major new source of income and employment for many rural communities. The authors concluded that the economic impact of snowmobiling stimulates the economy through job creation and additional expenditures on goods and services – providing significant income tax revenues to the provincial, municipal, and federal governments (Econometric Research Limited, 2011).

In 2019, MNP conducted a study of the economic impact of snowmobiling in Revelstoke, B.C. It showed the 2018 impact as: \$22.5 million in direct economic output and \$31.2 million in total economic output, \$7.7 million in direct GDP and \$12.9 million in total GDP, \$1.63 million in direct revenue for all three levels of government and \$2.75 million in total government revenue, 138 FTEs (full time equivalent employees) of direct employment and 197 FTEs of total employment (MNP, 2019).

Like Ontario, Quebec also has a high population of avid snowmobilers. A 2012 study conducted by Zins Beaudesne et Associés reported that the Federation des Club de Motoneigistes du Quebec (FCMQ) had 80,000 members and more than 32,000km of trails throughout the province. Quebec is the most comparable jurisdiction to Ontario given the nature of the climate, location and political environment, as well as similar club qualities. From the 2011 season, it was found that the snowmobile industry of Quebec generated economic benefits estimated at \$2 billion (Zins, 2012). The Quebec study reviewed the economic returns related to the following variables:

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

Across all variables, this study found an increased benefit from snowmobiling activities to the province. It is important to note that Quebec has a manufacturing industry for snowmobiles and groomers, while Ontario does not. For the Quebec study, no economic impact model was used. The authors of the study state that the value of the snowmobile industry in Quebec is based on the quality of the snow and the 32,000km of trails (Zins, 2012).

Snowmobiling in the United States (late 1990s) – The economic impacts of snowmobiling have been widely studied throughout the states since the late 1990s. Studies conducted in Maine, Michigan, and Minnesota between 1996 – 1998 found that snowmobiling activities generated anywhere between \$160-400 million USD in direct and indirect expenditures (Reiling, et. al., 1996; Schneider, et. al., 2005; and Stynes, et. al., 1998).

One of the earliest studies conducted in the United States found that snowmobilers in Maine and New Hampshire generated over \$225 million USD in direct (\$152 million USD) and indirect/induced (\$73 million USD) economic impacts during the 1995-1996 season. This study also provided a description of the socio-demographic characteristics of snowmobilers in Maine who, like in Ontario studies, were found to be predominately male. Snowmobiles, both new and used, accounted for nearly 50% of all expenditures between 1995 and 1996. Trailers and other accessories, insurance, trip expenses and repair and maintenance were also included in the study of expenditures (Reiling, et. al., 1996).

In the following year, 1996-1997, a comprehensive study of snowmobilers in Michigan found that over 100,000 households with permit holders spent \$160 million USD on trips and \$400 million USD on equipment-related expenses. Furthermore, this study found that snowmobiling was a large tourism attraction for Michigan, with snowmobiling trip spending accounting for approximately 2% of all tourism trip spending in the state. The study also found that 37% of total spending for overnight or day trips of more than 100 miles (\$132 million USD) were from out-of-state snowmobilers (Stynes, et. al., 1998). Like many jurisdictions, registrations had declined since the 1980s, but it was found that the economic impacts of the sport in 1996-1997 were still significant. In Michigan, since the 1970's, a significant snowmobile industry has developed including snowmobile dealers, resorts, snowmobile clubs, and a statewide system of trails and facilities, like Ontario (Stynes, et. al., 1998).

Another study conducted in Minnesota in 1996 found that the economic impacts contributed \$300 million toward Minnesota's gross state product and approximately 5,900 jobs. Including non-resident expenditures, snowmobiling expenditures totaled \$199.6 million, of which 92 percent came from resident expenditures. The study included a survey of registered Minnesota snowmobilers, as well as snowmobile manufacturers and retailers. Approximately 43% or \$78.6 million of the total residential expenditures were spent in the destination area within the state. The remainder of the expenditures (\$105.6 million) were spent at home and en route to the destination. When residents and non-residents snowmobile throughout the state, significant direct, indirect and induced impacts flow into the local areas visited (Schneider, et. al., 2005).

Snowmobiling in the United States (2010s) – Since the studies conducted at the end of the 20th century, several newer studies measuring the economic impact of snowmobiling have been conducted in the U.S. In 2014, the Montana State Parks department commissioned a study to examine snowmobiling activity during the 2013-2014 season. This study came after Yellowstone National Park officially began limiting snowmobile access to 318 commercially lead sleds per day. The author noted that non-resident snowmobilers typically spent more on their trips (due to food and overnight accommodations) than resident snowmobilers (\$147/day and \$56/day respectively). In addition, Yellowstone pass data shows that only 2% of passes sold during the 2013-2014 season were purchased by resident snowmobilers. This study found 57,000 registered snowmobilers in the Montana area. The author estimated that resident snowmobilers spent \$96 million during the 2013-2014 season and that non-resident snowmobilers contributed another \$14 million in spending. The largest and most significant concern reported by snowmobilers who participated in this study was access to snowmobiling areas (Sylvester, 2014).

Shortly after the Montana study was completed, a similar study was conducted in Idaho during the 2016-2017 season. This study found that snowmobilers spent \$197.5 million on expenditures. The largest expenses included sleds and equipment (\$57 million), food and beverages (\$44 million) and retail (\$31 million). Snowmobiling is a popular pastime in Idaho, which had 35,564 registered snowmobiles in 2016-2017. However, as with the previous case study, the authors noted that snowmobiling activity is concentrated in specific regions – namely populated counties with favourable terrain and winter conditions. The authors estimated that snowmobilers took around 190,675 trips during that season and looked at the direct, indirect, and induced effects of snowmobiling on the greater economy. They conclude that the \$197.5 million spent that year contributed to the generation of 4,062 full-time equivalent jobs and an increase in labour income of \$108.2 million. In addition, they estimate an increase in the output of locally produced goods and services in Idaho of \$157.3 million.

Another study of the 2016-2017 snowmobiling season conducted in Utah found that snowmobiling contributed \$88.4 million to Utah's economy. The study found that there were 22,803 sleds registered to 11,350 households throughout the state and that, when adjusted for population growth, the number of snowmobilers remained steady over the last 20 years. Snowmobile owner profiles show that the average

age of the snowmobiler was 54, however the age of registered individuals ranged from 18 to 83. Snowmobilers were also shown to spend an average of \$6,086 on snowmobiling activities per year. Looking at direct, indirect, and induced effects of snowmobiling, the study found that the industry supported 1,378 full-time/full-time equivalent jobs in 2017 and contributed \$88.4 million to Utah's economy. That being said, the economic impacts of snowmobiling were found to be concentrated in a few counties, namely: Salt Lake, Summit, Utah, Wasatch, and Weber counties. The study also acknowledged that the economic impacts of snowmobiling were limited to a few sectors, primarily the motor vehicle and parts sector and the gasoline and retail sectors (Smith & Lamborn, 2017).

Finally, the American Council of Snowmobile Associations (ACSA) recently released a 2019 report entitled *Facts and Myths About Snowmobiling and Winter Trails*. This report states that there are over 137,000 miles of groomed trails across the country. These trails are open to the public and as such are used for a variety of winter activities such as: cross-country skiing, backcountry skiing, snowshoeing, dog sledding, winter hiking, fat tire bicycling, and, in some areas, ATV riding. Unsurprisingly, snowmobiling is most common in the northern regions of the United States, with the report citing the following states popular snowmobiling destinations: Idaho, Iowa, Michigan, Minnesota, Montana, Oregon, Pennsylvania, South Dakota, Utah, Washington, and Wyoming. There are an estimated 1.2 million registered snowmobilers in the US and the average snowmobiler rides up to 1,250 miles per season. Like Ontario, the average age of the American snowmobiler is 45 and 75% of all snowmobilers are male. The ACSA also sites snowmobiling as an important facet of the economy, stating that it is a catalyst for many rural communities across the country. In the US, snowmobiling generates over \$26 Billion in annual spending across the country and is responsible for an estimated 100,000 fulltime jobs (ACSA, 2019).

Study Approach

Ontario's Tourism Regional Economic Impact Model (TREIM)

The Ontario Ministry of Tourism, Culture & Sport supports the TREIM³ process to determine the economic impact of visitors' and businesses' spending in the tourism sector on the local and provincial economies. TREIM produces estimates of the direct, indirect and induced impacts of tourism-related activities on Gross Domestic Product (GDP), labour income and employment, as well as estimates of the direct and total impacts of tourism-related activities on federal, provincial and municipal tax revenues. TREIM is a multi-region input-output model that covers 16 travel regions; 49 counties, districts and regional municipalities; 43 census metropolitan areas (CMA) and census agglomerations (CA); and the entire province of Ontario. TREIM has been used to estimate the impact of the Toronto International Film Festival, as well as the Trent-Severn Waterway National Historic Site of Canada (The Centre for Spatial Economics, 2008; TCI Management Consultants, 2010). TREIM was developed for the Province by the Conference Board of Canada using their national input-output models.

TREIM considers four types of new expenditure in an economy:

- **Visitor Spending** –used to estimate the economic impact of tourism spending in a specific region and/or for a specific event;
- **Operational Expenses** – used to estimate the economic impact of operating an ongoing business, such as an attraction, retail business, hotel or restaurant;
- **Investment Expenditures** – for estimating the economic impact of investing in or building a tourism facility, such as an attraction, retail business, hotel or restaurant; and
- **Convention Centre Activity** – for estimating the economic impact of a convention, which includes the spending of delegates and exhibitors, as well as production costs.

This study uses the Visitor Spending category only, which takes into consideration the expenditures of visitors, tourists and/or clients who are either drawn into the area where they otherwise would not have visited or are already in the area but who extend their stay for some period of time because of snowmobiling in Ontario. This study does not include provincial funding provided to improve and maintain trails but instead looks at the total expenditures of snowmobilers during single-day and multi-day trips and tours.

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

Survey of Ontario Snowmobilers

In consultation with the OFSC, HCA developed and implemented an online survey to collect data on snowmobiling habits and expenditures in the 2022-2023 season. HCA used a web survey development cloud-based program, Survey Monkey, and an updated survey version developed for the 2018-2019 study. As the same survey tool was used, the survey was not pre-tested before its release. The survey was sent out by OFSC to approximately 95,000 individuals using an email database that included those who purchased an OFSC permit for 2022-2023 and previous permit holders going back five years. The survey

³ For more information on TREIM please visit: <http://www.mtc.gov.on.ca/en/research/treim/treim.shtml>

was also shared through OFSC's social media platforms and was emailed to OFSC members by district administrators. The survey was open for over four weeks between June 29 and July 31, 2023.

For the survey instrument, please refer to the Appendices.

Consultation with OFSC

HCA conducted the study in close consultation with the OFSC leadership, staff, and volunteers in critical stages of the study. These included reviewing of all secondary data on OFSC membership, including permits and snowmobile licences, estimation of active snowmobile weeks by district directors, and other contextual information that informed the economic impact assessment.

Findings

Household Characteristics

Snowmobiling is a male-dominated activity. Over 90% of all survey respondents were male. However, many of the survey respondents reported sledding with a partner who was most often female, as well as with their children. Past studies showed that most snowmobilers participate in snowmobiling as a family activity, with 90% reporting that they sled with their family member(s), namely, spouse, kids, or grandkids⁴.

Table 1: Gender of Survey Respondents

Gender	#	%
Male	6,550	91.0%
Female	587	8.2%
Non-conforming / non-binary	2	0.03%
Prefer not to answer	14	0.2%
Didn't Specify ^a	43	0.6%
Total	7,196	100.0%

^a Participants who responded “me” or “myself” along with the gender of other family members. Does not include blank responses.

The household size of survey respondents ranged from 2-4, most frequently, with an average family size of 2.74. The most common household size was 2 (49.7%), followed by 4 (18%) and 3 (16.6%), and a small number of respondents reported families of 9 or more (however, it is difficult to say whether this was in reference to immediate family or extended family). Of all survey respondents, 62.6% reported sledding with another family member, with two active snowmobiles per household being the most common (41.7%) followed by single-sled households (37.4%) and three (11%) and four (9%) sleds per family, respectively.

Table 2: Household Size of Survey Respondents

Household Size	#	%	Cumulative %
1	324	7.08%	7.08%
2	2279	49.77%	56.85%
3	763	16.66%	73.51%
4	827	18.06%	91.57%
5	273	5.96%	97.53%
6	90	1.97%	99.50%
7	13	0.28%	99.78%
8	7	0.15%	99.93%
9 or more	3	0.07%	100.00%
Total	4,579	100.0%	

⁴ Harry Cummings & Associates (2014, 2019). Economic Impact of Snowmobiling in Ontario

Nearly 85% of the survey respondents were married or in a common-law relationship at the time of the survey. Another 8.2% reported that they were single, 3.5% were divorced or separated, 1.6% were widowed, and another 1.9% preferred not to answer and reported other.

Table 3: Marital Status of Survey Respondents

Marital Status	#	%
Married/Common law	3,905	84.8%
Single	377	8.2%
Divorced/Separated	161	3.5%
Widowed	74	1.6%
Prefer not to answer	74	1.6%
Other	15	0.3%
Total	4,606	100.0%

The average age of the survey respondents was 54.4 years, and over half were 50 years or older. In addition to the survey respondents, other household members reported as active snowmobilers aged 10-99 years. The average age of all household members was 42 years. In the previous study, many interview respondents commented that snowmobiling is an aging sport, with only one interviewee noting that it's becoming more of a family-oriented activity. Interview respondents in the 2019 study commented on challenges about snowmobilers' age, pointing out that the average age of OFSC volunteers is 50 and voicing concern about the organization's longevity if they cannot attract younger volunteers.

Table 4: Age of Survey Respondents

Age Category	Survey Respondents			All Household Members		
	#	%	Cumulative %	#	%	Cumulative %
0-19	86	1.2%	1.2%	1,144	5.7%	5.7%
20-24	93	1.3%	2.5%	1,062	5.3%	11.1%
25-29	146	2.0%	4.5%	907	4.5%	15.6%
30-34	231	3.2%	7.8%	1,248	6.3%	21.9%
35-39	272	3.8%	11.6%	786	3.9%	25.8%
40-44	434	6.1%	17.6%	1,432	7.2%	33.0%
45-49	732	10.2%	27.9%	2,208	11.1%	44.0%
50-54	1,115	15.6%	43.5%	3,123	15.7%	59.7%
55-59	1,319	18.4%	61.9%	3,033	15.2%	74.9%
60-64	1,320	18.4%	80.3%	2,767	13.9%	88.8%
65-69	924	12.9%	93.2%	1,353	6.8%	95.6%
70-74	310	4.3%	97.6%	574	2.9%	98.4%
75-79	148	2.1%	99.7%	258	1.3%	99.7%
80+	25	0.3%	100.0%	55	0.3%	100.0%
Total	7,155	100.0%		19,950	100.0%	
Average Age	54.4			42		

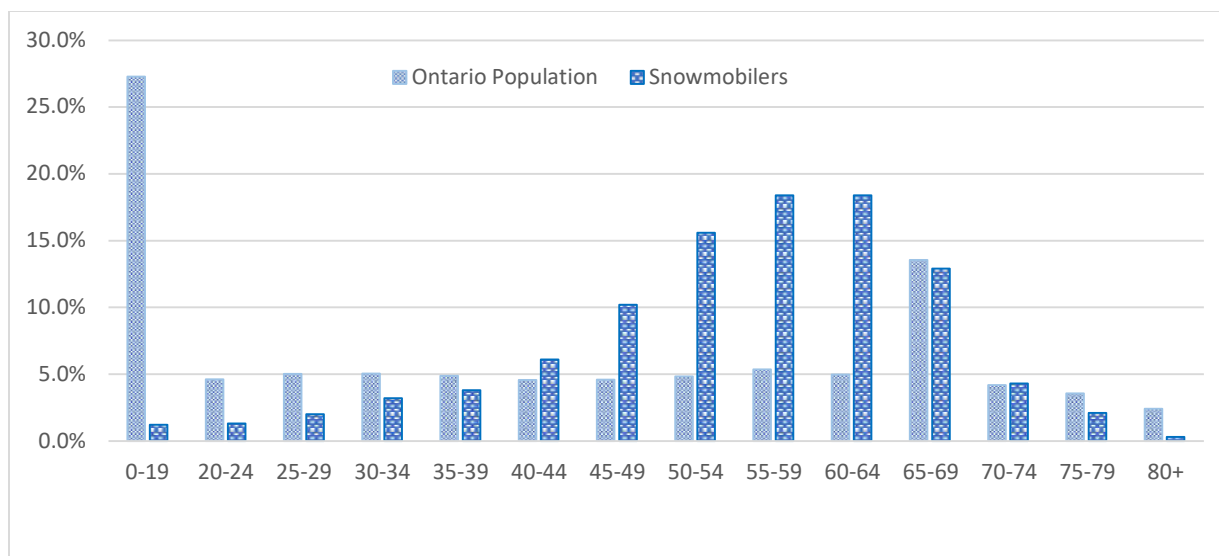


Figure 1: Age Comparison, Survey Respondents and Ontario Population⁵

Survey respondents were asked to specify the highest level of education completed to date. College level education was the highest level of education reported most frequently by survey respondents (37.7%), secondary school (20.4%), professional certification (16.6%) and University first degree (15.2%) and University advanced degree (7.1%). Primary school level respondents constituted the lowest (1.7%); the rest, 1.3%, reported other.

Table 5: Highest Education Level Attained by Survey Respondents

Education Level	#	%	Cumulative %
Primary	79	1.7%	1.7%
Secondary	924	20.4%	22.1%
College	1,713	37.7%	59.9%
Professional certification	752	16.6%	76.4%
University first degree	689	15.2%	91.6%
University advanced degree	323	7.1%	98.7%
Other	58	1.3%	100.0%
Total	4,538	100.0%	

Compared to provincial education rates, a larger proportion of snowmobilers have completed an apprenticeship or trades program, as seen below in Figure 2. Snowmobilers were likelier to have completed a college, CEGEP, or other non-university certificate or diploma but less likely than the general population to have a bachelor's degree or higher. Fewer snowmobilers put down their highest level of education as secondary than the general population.

⁵ Statistics Canada. [Census Profile, 2021 Census of Population. Profile Table](#)

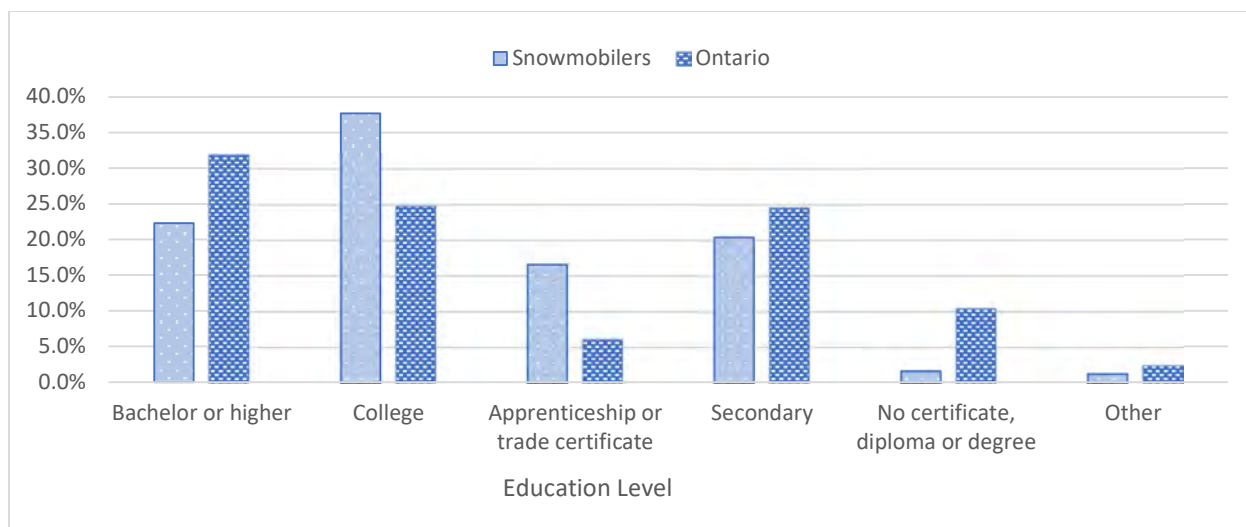


Figure 2: Education Level Comparison, Survey Respondents and Ontario Population⁶

Over 92% of survey respondents reported a household income of over 50,000 a year, and over 66% of snowmobilers had an annual household income of over \$100,000 (see Figure 3). Compared to the general population, there is a more significant proportion of snowmobilers in the income categories above \$150,000. Proportions of households are nearly even for snowmobilers and Ontario residents in income brackets of \$50,000 to \$99,999. There is a smaller proportion of snowmobilers than Ontario households in the income bracket \$100,000 to \$149,999, and more snowmobilers than Ontario households are registered for income brackets over \$150,000. As a result, income distribution across households is more even for the province than it is with snowmobilers, particularly due to the high proportion of snowmobiler households above \$150,000 income brackets among Ontario households.

Table 6: Average Household Income of Survey Respondents

Household Income	#	%	Cumulative %
Under \$5,000	8	0.2%	0.2%
\$5,000 to \$9,999	9	0.2%	0.4%
\$10,000 to \$ 19,999	32	0.8%	1.3%
\$20,000 to \$ 49,999	239	6.2%	7.4%
\$50,000 to \$99,999	999	25.7%	33.2%
\$100,000 to \$149,999	963	24.8%	58.0%
\$150,000 to \$199,999	783	20.2%	78.1%
\$200,000 & Over	848	21.9%	100%
Total	3881	100.0%	

⁶ Statistics Canada. [Education Highlight Tables, 2016 Census.](#)

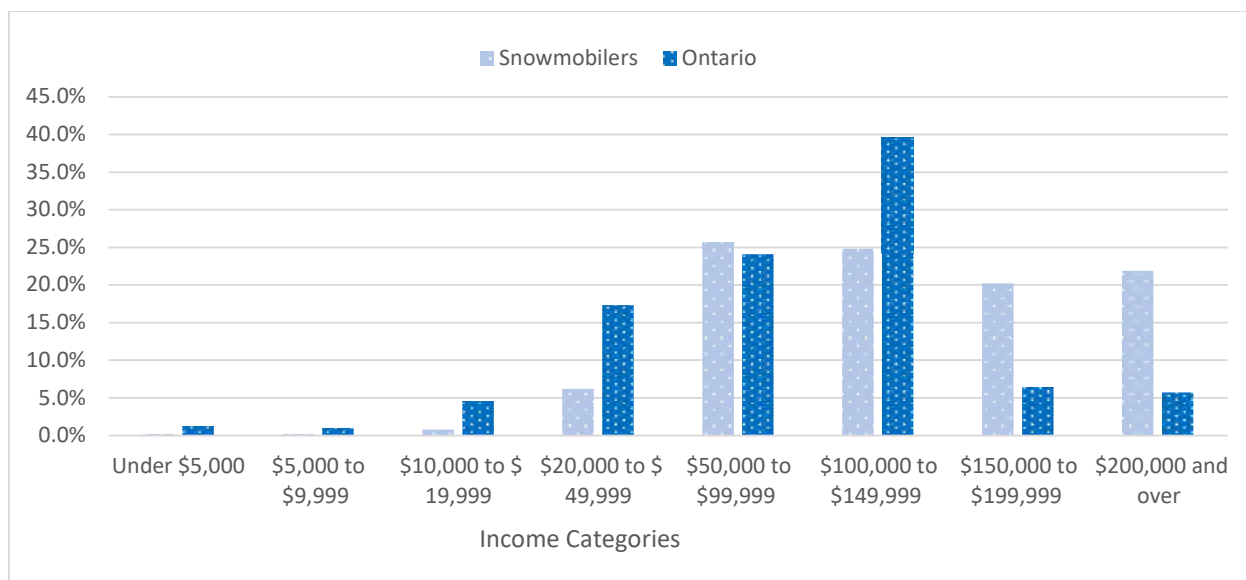


Figure 3: Household Income Comparison, Survey Respondents and Ontario Population⁷

Participation in Snowmobiling

Weather conditions during the 2022-2023 season varied across snowmobiling districts. Most notably, the northern districts (11-17) had a particularly long snowmobiling season, with around 17 weeks of good sledding conditions. By contrast, districts 4 and 5 (2 of the largest districts by population) experienced more rain/freezing rain than snow, and as a result, the trails were only open between 1-4 weeks in those districts. Interview respondents and OFSC staff confirmed these conditions. Related, around a third of snowmobilers reported sledding less than in most seasons. The percentage of snowmobilers who reported snowmobiling less or not at all has increased significantly since the 2014 study, in which 7.4% of survey respondents reported sledding less and only 0.4% said ‘not at all.’

Snowmobiling conditions were reported to be average compared to previous years for many of the northern snowmobiling districts, as reported by OFSC staff. Approximately one in ten snowmobilers reported sledding ‘more than most seasons’, while one-third of the survey respondents reported sledding ‘about the same as most seasons.’ However, 46.9% of the survey respondents reported sledding less than most seasons.

Table 7: Participating in Snowmobiling during the 2022-2023 Season

Comparison to Previous Seasons	#	%
More than most seasons	834	11.6%
About the same as most seasons	2,240	31.2%
Less than most seasons	3,370	46.9%
2022-2023 was my first snowmobile season	335	4.7%
Not at all	410	5.7%
Total	7,189	100.0%

⁷ Statistics Canada. 2017. [Ontario \[Province\] and Canada \[Country\] \(table\). Census Profile. 2016 Census. Statistics Canada Catalogue no. 98-316-X2016001. Ottawa. Released November 29, 2017.](#)

A total of 12,901 survey respondents reported going on at least one day trip during the 2022-2023 snowmobiling season. Over 26.7% of the survey respondents reported going twice per month; about 22.9% reported going on day trips 2-3 times a week; over 18.8% reported going weekly; and about 14% reported going at least three times per month. Other, smaller proportions reported more frequent sledding, including 6-7 times per week (1%) and 4-5 times per week (3.4%). In the 2022-2023 season, over 13% of snowmobilers reported not having trips at all. The average snowmobiler went on 15.3 one-day trips in 2022-2023, noting the substantial variance between districts in the number of weeks with suitable weather.

Table 8: Frequency of Day Trips Reported by Survey Respondents

Day Trips	#	%
6-7 per week	170	1.0%
4-5 per week	563	3.4%
2-3 per week	3,567	22.9%
Once per week	2,720	18.8%
Three times per month	2,110	14.1%
Twice per month	3,771	26.7%
Never	1,744	13.2%
Total	14,645	100.0%

Average: 15.3 1-day trips in 2022-2023 ^a

^a Calculated based on the number of people who reported going on one or more day trips and 11.0 weeks of snowmobiling season as average across the region

In total, 4,190 snowmobilers reported going on one or more overnight trips in the 2022-2023 season. Survey respondents most frequently cited going on one overnight trip (18.21%), followed by two overnight trips (10.82%) and three overnight trips (6.45%). On average, survey respondents who attended these trips went on 1.1 overnight trips this season. In general, there is a marginal decline in overnight trips compared to the 2018-2019 season, with the average survey respondent overnight trip declining from 1.4 trips to 1.1.

Table 9: Frequency of Overnight Trips Reported by Survey Respondents

Trips (1-3 Nights)	#	%
1	1,705	18.21%
2	1,013	10.82%
3	604	6.45%
4	343	3.66%
5	177	1.89%
6	95	1.01%
7	44	0.47%
8	48	0.51%
9	10	0.11%
10 or more	80	0.85%
Never	5,242	56.00%
Total	9,361	100.0%

Average: 1.1 overnight trips in 2022-2023 ^a

^a Calculated based on the number of people who reported going on one or more overnight trips

Tours refer to overnight trips of more than three nights away from home. A total of 2,545 survey respondents reported that they went on at least one tour in the 2022-2023 season. Over 15% of respondents said they went on one tour this season, and just over 13% said they went on two tours or more. Of the 8,954 survey respondents, 6,409 never went on a snowmobiling tour in the 2022-2023 season. The average snowmobiler went for 0.6 tours in 2022-2023. Like overnight trips, the average showed a decline of 0.1 tours per snowmobiler. This shows a shift towards increasing day trips and a slight decrease in tours and overnight trips.

Table 10: Frequency of Tours Reported by Survey Respondents

Tours	#	%
1	1,371	15.31%
2	590	6.59%
3	289	3.23%
4	132	1.47%
5	59	0.66%
6	35	0.39%
7	17	0.19%
8	8	0.09%
9	20	0.22%
10 or more	24	0.27%
Never	6,409	71.58%
Total	8,954	100.0%
Average: 0.6 tours in 2022-2023 ^a		

^a Calculated based on the number of people who reported going on one or more tours

There were survey respondents from each of the 16 OFSC Districts. District 1 (Ottawa, Kingston) and District 5 (London, Kitchener, Brantford) had the most significant representation, with 14.7% and 13.83% of the survey respondents, respectively, followed by District 3 with 9.23% (Uxbridge, Belleville, and Peterborough) and District 4 (Orangeville).

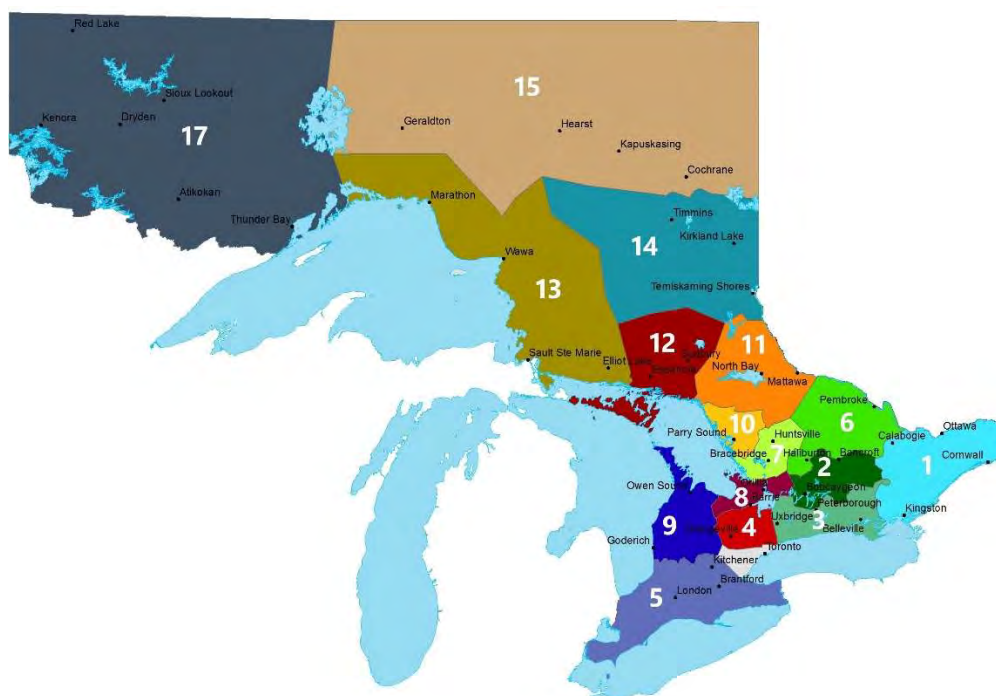


Figure 4: Map of OFSC Districts

In addition to their home residence, survey respondents identified secondary districts where they typically snowmobile. District 6 (13.3%), District 2 (13%) and District 7 (11.72%) were the districts with the most reported vacation homes by survey respondents.

Table 11: Place of Residence of Survey Respondents

District	Primary Residence		Secondary (Vacation) Residence	
	#	%	#	%
1	644	14.70%	117	6.59%
2	252	5.75%	231	13.01%
3	405	9.24%	62	3.49%
4	368	8.40%	25	1.41%
5	606	13.83%	15	0.85%
6	238	5.43%	236	13.30%
7	210	4.79%	208	11.72%
8	295	6.73%	89	5.01%
9	346	7.90%	93	5.24%
10	145	3.31%	200	11.27%
11	178	4.06%	176	9.92%
12	279	6.37%	92	5.18%
13	115	2.62%	65	3.66%
14	140	3.19%	86	4.85%
15	58	1.32%	35	1.97%
17	103	2.35%	45	2.54%
Total	4,382	100.0%	1,775	100.0%

Survey respondents were also asked to identify the district where they most commonly ride during a typical season. District 1 (Ottawa, Kingston), District 6 (Haliburton, Pembroke), and District 2 (Bancroft, Bobcaygeon) were the most reported district for survey respondents, with 11.3%, 10.32% and 9.1% of respondents reporting riding, respectively. These districts are followed by District 7 (Huntsville, Bracebridge) and District 11 (North Bay, Mattawa, French River), with 8.7% and 8% of survey respondents, respectively. (see Table 12).

Table 12: The District Where Survey Respondents Most Commonly Ride

Districts	Primarily Ride	%
1	493	11.33%
2	397	9.13%
3	180	4.14%
4	104	2.39%
5	138	3.17%
6	449	10.32%
7	379	8.71%
8	256	5.89%
9	335	7.70%
10	288	6.62%
11	350	8.05%
12	299	6.87%
13	153	3.52%
14	214	4.92%
15	207	4.76%
17	108	2.48%
Total	4,350	100.0%

In addition to the most common riding destination, survey respondents were asked to identify the areas where they ride second and third most often. When looking at the districts where respondents ride most frequently, second most frequently, and third most frequently, District 6 (Haliburton, Pembroke) was most cited as a riding destination at 10.83% of all reported destinations. District 11 (North Bay, Mattawa) was a close second at 10.23% of all reported destinations, followed by District 7 (Huntsville, Bracebridge) as the third most reported destination at 8.53% of survey respondents (see Table 13). These three districts were similarly the top three destinations in the 2018-2019 study.

Table 13: Districts Where Survey Respondents Most Commonly Ride

Districts	Primarily Ride	2 nd Most Likely to Ride	3 rd Most Likely to Ride	Total	%
1	493	148	113	754	7.58%
2	397	285	191	873	8.78%
3	180	134	105	419	4.21%
4	104	103	95	302	3.04%
5	138	101	86	325	3.27%
6	449	422	206	1,077	10.83%
7	379	271	198	848	8.53%
8	256	137	96	489	4.92%
9	335	148	115	598	6.01%
10	288	248	185	721	7.25%
11	350	372	295	1,017	10.23%
12	299	220	162	681	6.85%
13	153	78	83	314	3.16%
14	214	286	252	752	7.56%
15	207	226	190	623	6.26%
17	108	23	22	153	1.54%
Total	4,350	3,202	2,394	9,946	100.0%

Snowmobiles

Survey respondents were asked to provide information on the year in which they purchased their snowmobile, new or used, as well as the model year and type of permit purchased for each sled this season. Many survey respondents had purchased snowmobiles recently, with the year of purchase of nearly 70% of the 12,807 snowmobiles in the last five years. Nearly a quarter of reported snowmobiles (22.43%) were purchased in 2022, 10.38% were purchased in 2023, and approximately 15% of the snowmobiles were purchased in 2021. The other 20% were purchased between 2014 and 2018.

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

Year Purchased	#	%
2023	1,329	10.38%
2022	2,873	22.43%
2021	1,916	14.96%
2020	1,584	12.37%
2019	1,260	9.84%
2014-2018	2,605	20.34%
2009-2013	668	5.22%
2008 or earlier	572	4.47%
Total	12,807	100.0%

About half of survey respondents reported owning snowmobiles manufactured within the last five years (44%). Almost a quarter of them, 24.5%, reported that their snowmobiles were manufactured between this year and the previous year. With another 26.8% of snowmobiles manufactured between 2014-2018. Model years 2019, 2020 and 2021 recorded lower proportions, ranging from 6.63% to 7.38%.

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

Model Year	#	%
2023	1,411	10.85%
2022	1,775	13.65%
2021	961	7.39%
2020	809	6.22%
2019	862	6.63%
2014-2018	3,487	26.81%
2009-2013	1,620	12.45%
2008 or earlier	2,083	16.01%
Total	13,008	100.0%

The Province of Ontario requires a valid trail permit on every active machine on Ontario trails, and as such, there are various types of permits available to riders for their machines, as listed below. In total, respondents reported purchasing 12,802 trail permits for their snowmobiles. Survey respondents reported 505 machines without any permit. A seasonal permit was the most common permit type reported, with 90.5% of reported snowmobiles attached to a seasonal permit

Table 16: Permit Type for snowmobiles owned as reported by Survey Respondents

OFSC Permit Type	#	%
Classic Permit	466	3.6%
Seasonal Permit	11,581	90.5%
Multi-Day Permit	205	1.6%
Special Event Permit	11	0.1%
Other	28	0.2%
No Permit	505	3.9%
Total	12,802	100.0%

Annual Spending

Those who participate in snowmobiling are subject to spending on various items annually, including insurance and trail permits, occasionally purchasing a snowmobile, repairs and maintenance and smaller ticket items, such as clothing.

Only the snowmobiles purchased in 2022-2023 with valid purchase prices reported were reviewed for this assessment. A total of 3031 snowmobile purchases, new or old, were reportedly purchased in 2022-2023. The average amount spent purchasing one or more snowmobiles in 2022-2023 was \$15,440.70.

Table 17: Cost of Snowmobile Purchases in 2022-2023 Reported by Survey Respondents

Cost of Snowmobile(s) Purchased in 2022-2023	#	%	CAD
\$1-1,000	53	1.75%	\$34,250
\$1,001-2,000	103	3.40%	\$172,861
\$2,001-3,000	98	3.23%	\$261,325
\$3,001-4,000	119	3.93%	\$445,800
\$4,001-5,000	107	3.53%	\$516,120
\$5,001-7,500	221	7.29%	\$1,435,506
\$7,501-10,000	260	8.58%	\$2,361,650
\$10,001-15,000	456	15.04%	\$5,985,676
\$15,001-20,000	632	20.85%	\$11,615,152
\$20,001-25,000	709	23.39%	\$16,312,948
\$25,001-30,000	236	7.79%	\$6,511,845
More than \$30,000	37	1.22%	\$1,327,771
	3031	100%	\$46,980,904

of Households that Purchased at Least One Snowmobile in 2022-2023: **2,477**

Average Amount Spent on Purchase in 2022-2023: **\$15,440.70**

Survey respondents were asked to report on their annual insurance costs for their snowmobiles. A total of 5,352 individuals reported purchasing insurance for one or more snowmobiles in the 2022-2023 season. The majority (72%) of the insurance costs fall within the range of \$201 to \$1000. A similar proportion of insurance costs were within the \$400 range in 2018-2019. For survey respondents, the average household reported spending \$717.08 on insurance annually.

Table 18: Annual Insurance Cost per Household

Insurance Cost	#	%
\$1-100	155	2.90%
\$101-200	415	7.75%
\$201-300	606	11.32%
\$301-400	671	12.54%
\$401-500	705	13.17%
\$501-750	1,069	19.97%
\$751-1,000	806	15.06%
\$1,001-1,500	572	10.69%
\$1,501-2,000	211	3.94%
More than \$2,000	142	2.65%
Total	5,352	100.0%
Average	\$717.08	

The annual repairs and maintenance, as well as emergency repairs while on a trip were examined to get a better understanding of the costs associated with regular maintenance per household. Households spent, on average, \$870.33 repairing and maintaining their snowmobile(s) in 2022-2023.

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

Repairs and Maintenance Costs	#	%
\$1-100	230	4.56%
\$101-200	483	9.57%
\$201-300	512	10.14%
\$301-400	315	6.24%
\$401-500	656	13.00%
\$501-750	289	5.73%
\$751-1,000	660	13.08%
\$1,001-1,250	1,021	20.23%
\$1,251-1,500	224	4.44%
\$1,501-1,750	27	0.53%
\$1,751-2,000	266	5.27%
More than \$2000	364	7.21%
Total	5,047	100.0%
Average	\$870.33	

Survey respondents were asked to report how much they spent on snowmobile-related clothing for the 2022-2023 season. This clothing could include coats, insulated pants, gloves, and boots. A total of 4,268 respondents reported purchasing new clothing during the 2022-2023 snowmobiling season. Amounts spent on clothing varied across households, with some spending under \$100 (5.88%) while others spent several thousand. On average, snowmobiling households spent \$801.71 on clothing in 2022-2023, higher than the \$600.42 spent in the 2018-2019 season.

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

Amount Spent on Clothing	#	%
\$1-100	251	5.88%
\$101-200	455	10.66%
\$201-300	293	6.87%
\$301-400	197	4.62%
\$401-500	543	12.72%
\$501-750	217	5.08%
\$751-1,000	685	16.05%
\$1,001-1,250	891	20.88%
\$1,251-1,500	214	5.01%
\$1,501-1,750	18	0.42%
\$1,751-2,000	244	5.72%
More than \$2000	260	6.09%
Total	4,268	100.0%
Average	\$801.71	

Day Trip Spending

Spending on food and beverage and fuel/oil for day trips was examined to understand how much money households spend on short trips. As stated previously, 12,901 survey respondents indicated they went on at least one day trip during the 2022-2023 snowmobiling season. Under the assumption that there were 11 weeks⁸ in the 2022-2023 season, the average snowmobiler was estimated to go on 15.3 one-day trips this season.

Food and beverage expenditures were split into two categories: restaurant spending and store purchases (e.g. grocery stores and convenience stores). Snowmobilers typically ate at restaurants during day trips as opposed to purchasing food and beverages at a store. Several interview respondents noted that snowmobilers often travel light (with one saying that all he brings on trips is a credit card) and that day trips often have a restaurant as a final destination. In total, 3,618 survey respondents reported on their restaurant purchases, and 2,680 reported on store purchases.

Households most commonly spent between \$1 and \$50 on food and beverages at a store but between \$51 and \$100 at a restaurant during a snowmobiling day trip. However, 26% of households said they spent under \$51 at a restaurant. Household spending at a restaurant and a store was also high in the \$251 to \$500 category, with 16.25% of restaurant and 11.11% of store spending recorded.

On average, households spent \$280.26 at a restaurant and \$129.25 at a store for food and beverages per trip.

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

Amount Spent on Food and Beverage	Restaurant #	Restaurant %	Store #	Store %
\$1-50	946	26.15%	1,072	52.70%
\$51-100	1,027	28.39%	339	16.67%
\$101-150	226	6.25%	57	2.80%
\$151-200	322	8.90%	198	9.73%
\$201-250	87	2.40%	39	1.92%
\$251-500	588	16.25%	226	11.11%
\$501 and over	422	11.66%	103	5.06%
Total	3,618	100.00%	2,034	100.00%
Average Spent (Daily)	\$280.26		\$129.25	

The cost of fuel and oil for day trips is another major expense. In total, 4,209 survey respondents reported on their fuel expense for day trips and 2,613 survey respondents reported fuel expenses for a towing vehicle used for a day trip. On average, households spent \$387.83 per day trip on fuel and oil for snowmobiles and \$340.77 for a towing vehicle.

⁸ Based on a weighted average of data from OFSC District Directors on the length of suitable snowmobiling weeks in the 2022-2023 season by district

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

Amount Spent Fuel/Oil	# Snowmobile	% Snowmobile	# Towing	% Towing
\$1-50	737	17.51%	448	17.15%
\$51-100	1,179	28.01%	628	24.03%
\$101-150	375	8.91%	216	8.27%
\$151-200	386	9.17%	304	11.63%
\$201-250	97	2.30%	72	2.76%
\$251-300	225	5.35%	164	6.28%
\$301 and over	1,210	28.75%	781	29.89%
Total	4,209	100.0%	2,613	100.0%
Average	\$387.83		\$340.77	

Overnight Trip Spending

Spending on accommodation, food and beverage, and fuel/oil for one to three nights away overnight trips was examined to get a sense of how much money households spend on overnight trips. A total of 4,190 survey respondents indicated they went on at least one overnight trip of one to three nights away from home during the 2018-2019 season. On average, survey respondents went on 1-2 overnight trips this season.

As with the day trip analysis, food and beverage purchases at restaurants and stores (e.g. grocery convenience stores) were examined for overnight trips. On average, households spent \$258.60 at restaurants and \$129.21 in stores on overnight trips of between 1-2 nights away from home. Approximately 24% of households spent \$100 or less in restaurants during overnight trips, and 66% spent \$100 or less on store food and beverage purchases. In total, 32% of respondents reported spending between \$251-\$500 at restaurants during overnight trips, and just over 30% of survey respondents reported spending between \$50-\$100 in food and beverage purchases in stores during an overnight trip.

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

Amount Spent on Food and Beverage	Restaurant #	Restaurant %	Store #	Store %
\$1-50	134	6.35%	521	35.42%
\$51-100	366	17.34%	454	30.86%
\$101-150	211	10.00%	93	6.32%
\$151-200	347	16.44%	174	11.83%
\$201-250	119	5.64%	40	2.72%
\$251-500	682	32.31%	140	9.52%
\$501 and over	252	11.94%	49	3.33%
Total	2,111	100.00%	1,471	100.00%
Average Spent (Per Trip)	\$258.60		\$129.21	

The fuel and oil costs for snowmobiles are an evident and necessary expense. In total, 2,222 survey respondents reported on their fuel/oil spending for their sled and 1,853 reported on their fuel/oil spending for a towing vehicle. Most survey respondents reported spending between \$50 and \$200 on fuel

for overnight trips, both for their snowmobiles and fuel for towing vehicles. For overnight trips, the average household spent \$682.10 on fuel for their snowmobile and \$248.76 on fuel for a towing vehicle.

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

Amount Spent Fuel/Oil	# Snowmobiles	% Snowmobiles	# Towing	% Towing
\$1-50	97	4.37%	70	3.78%
\$51-100	353	15.89%	310	16.73%
\$101-150	233	10.49%	204	11.01%
\$151-200	387	17.42%	335	18.08%
\$201-250	146	6.57%	112	6.04%
\$251-300	327	14.72%	249	13.44%
\$301-350	42	1.89%	36	1.94%
\$351-400	137	6.17%	136	7.34%
\$401-450	13	0.59%	7	0.38%
\$451-500	162	7.29%	140	7.56%
More than \$500	325	14.63%	254	13.71%
Total	2,222	100.0%	1853	100.0%
Average	\$682.10		\$248.76	

When participating in overnight trips of one to three nights away from home, snowmobilers have options for accommodations, including private cottages or vacation homes, hotels or motels, lodges, or bed and breakfasts. Of the 4,190 survey respondents who indicated going on at least one overnight trip, 1,931 reported accommodation expenses. Approximately 37% of respondents reported spending between \$400 and \$500 on overnight accommodations, with another 29.6% reporting that they spent more than \$500. A tiny proportion reported spending under \$100 in the 2022-2023 season compared to the 2019-2019 study. The average overnight accommodation spending in the 2022-2023 season was \$390.55.

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

Amount Spent on Accommodation	#	%
\$1-50	12	0.6%
\$51-100	75	3.9%
\$101-200	200	10.4%
\$201-300	251	13.0%
\$301-400	103	10.5%
\$401-500	718	37.2%
More than \$500	572	29.6%
Total	1,931	100.0%
Average	\$390.55	

Tour Spending

Spending on accommodation, food and beverage, fuel/oil, repairs, and any rental fees for tours of more than three nights away were examined to understand how much money households spend on these extended trips. A total of 2,545 survey respondents indicated they went on at least one tour during the 2022-2023 season.

On average, survey respondents went on less than 1 tour during the 2022-2023 season. The maximum amount spent on food and beverage in restaurants on tours was \$6,000. Of the snowmobilers who reported going on at least one tour, respondents most often reported going on 1-2 tours a year. The most frequent spending bracket for food and beverages in a restaurant is between \$251 to \$500 (41.2%), while for a store it is under \$50 (23%). On average, survey respondents reported spending \$312.71 on food and beverages from a restaurant and \$115.72 on food and beverages at stores while on a tour.

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

Amount Spent on Food and Beverage	Restaurant #	Restaurant %	Store #	Store %
\$1-50	39	3.29%	208	23.80%
\$51-100	98	8.26%	218	24.94%
\$101-150	67	5.65%	71	8.12%
\$151-200	126	10.62%	146	16.70%
\$201-250	67	5.65%	43	4.92%
\$251-500	489	41.23%	144	16.48%
\$501 and over	300	25.30%	44	5.03%
Total	1,186	100.00%	874	100.00%
Average Spent	\$312.72		\$115.89	

There were 1,201 survey respondents who reported on their fuel/oil expenses for their snowmobile and 1,061 who reported on their fuel/oil expenses for a towing vehicle. On average, survey respondents spent \$443.72 on fuel or oil for their snowmobile while on a tour of four or more nights away from home and \$471.64 on fuel or oil for their towing vehicle.

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

Amount Spent Fuel/Oil	# Snowmobiles	% Snowmobiles	# Towing	% Towing
\$1-50	39	1.76%	17	1.60%
\$51-100	88	3.96%	79	7.45%
\$101-150	78	3.51%	71	6.69%
\$151-200	148	6.66%	162	15.27%
\$201-250	74	3.33%	76	7.16%
\$251-300	135	6.08%	147	13.85%
\$301-350	37	1.67%	40	3.77%
\$351-400	108	4.86%	87	8.20%
\$401-450	20	0.90%	19	1.79%
\$451-500	132	5.94%	108	10.18%
More than \$500	342	15.39%	255	24.03%
Total	1,201	100.0%	1,061	100.0%
Average	\$443.72		\$471.64	

As with the overnight trips, snowmobilers have various accommodation options while on tours of more than three nights away from home, including private cottages, vacation homes, hotels or motels, lodges, or bed and breakfasts. Snowmobilers reported spending on accommodations for tours was dispersed widely, with the largest proportion, approximately 21%, reporting to spend over \$1000. The average household spends \$480.73 on accommodations per tour.

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

Amount Spent on Accommodation	#	%
\$1-100	35	3.38%
\$101-200	105	10.15%
\$201-300	0	0.00%
\$301-400	109	10.54%
\$401-500	155	14.99%
\$501-600	117	11.32%
\$601-700	57	5.51%
\$701-800	83	8.03%
\$801-900	22	2.13%
\$901-1000	125	12.09%
More than \$1000	226	21.86%
Total	1,034	100.0%
Average	\$480.73	

Volunteer Contribution

Survey respondents were asked to state if they volunteered for the OFSC and the total hours they volunteered in the 2022-2023 season. A total of 1252 respondents stated they volunteered at least once in the 2022-2023 season. Of these, 969 were able to state the number of hours they volunteered. Overall, the average individual volunteered approximately 80 hours in the season, and a total of 77,484 volunteer hour contributions were registered by the 969 respondents. In addition, the OFSC recorded a total of 6000 volunteers in the 2022-2023 season. We estimated the total volunteer hours of 6000 volunteers to be nearly 479,777⁹ total volunteer hours contributed to snowmobiling in Ontario.

Individuals volunteered for a range of snowmobiling-related functions that the OFSC required. The functions included governance (from OFSC board to clubs), directors of operations, field and districts, running clubs and club functions, administrative work, communication, fundraising, marketing, maintenance and repair, groomer operations and others.

The monetary equivalent of the total volunteer hours was calculated by applying the average hourly wage in Ontario of \$34.20, which resulted in an estimated \$16,408,376 in voluntary contribution to snowmobiling activity in Ontario.

⁹ This projection is arrived at by multiplying 6000 volunteers with an average 80 volunteer hours per person.

Table 29: Volunteer Contribution to OFSC

	2022-2023
Total # of respondents who reported volunteering	1,252
Total # of respondents who reported volunteering time	969
Volunteering type	
On the board of a snowmobile club	300
On trail work	851
Other (clubs, districts, administration, skilled work, etc.)	328
Total hours Volunteered by survey respondents	77,484
Average Volunteer Hours per person	79.96
Total # of recorded volunteers by OFSC (OFSC record)	6,000
Total Hours - Projected to 6000 volunteers	479,777
Hourly rate (Av. Ontario Hourly wage)	\$34.2
The total monetary value of volunteer contribution	\$16,408,376.47

Summary of Findings

Household characteristics of the survey population show that most snowmobilers are male (91%). However, many reported sledding with a female partner and/or their children. Evidence from the key informant interviews¹⁰ suggests that snowmobiling is becoming more of a family-oriented sport, an idea supported by the demographics of accompanying household members. Household size typically ranged between 2-4 members, and approximately 85% of survey respondents were married or in a common-law relationship. These findings are consistent with the 2018-2019 study findings. On average, snowmobile respondents were 54 years old, which is higher by four years compared to the average age of the 2018-2019 report. Compared to provincial statistics, there is a greater percentage of snowmobilers between the ages of 40-70 than people in the general population. Snowmobilers were more likely to have completed a college or apprenticeship program than the general population, and the average household income of snowmobilers was higher than provincial averages, with over 66% of snowmobilers bringing in an annual household income of over \$100,000.

Weather conditions varied across districts during the 2022-2023 snowmobiling season, and as a result, the total number of sledding weeks changed from between 18 weeks in District 15, to just one week in District 5, with a weighted average of 11.0 weeks across the province. As a result, the number of survey respondents who reported that they snowmobiled 'less than most years' progressively increased from 7.4% in 2013-2014 to 28.7% in 2018-2019 and 46.9% in 2022-2023. In total, 12,901 survey respondents indicated going on at least one day-trip in 2022-2023. Under the assumption that there were 11 suitable weeks this season, the average snowmobiler went on 15.3 one day-trips in 2022-2023 (from 11 one day-trips in 2018-2019). Another 4,190 snowmobilers reported going on at least one overnight trip of one to three nights away from home, with the average survey respondent going on 1.1 overnight trips this season. Finally, 2,545 survey respondents indicated they went on at least one tour of four or more nights away from home this season. While the average snowmobiler, across all survey respondents, went on less than one tour this year (0.6), snowmobilers who reported going on tours went on between 1 and 2 this season.

Survey results show a concentration of snowmobilers with homes in District 1 (Ottawa and Kingston), District 5 (London, Kitchener, Brantford area), District 3 with 9.23% (Uxbridge, Belleville, and Peterborough), and District 4 (the GTA), like the 2018-2019 season except for District 3. Districts 6, 2 and 7 were the most frequented vacation districts.

The average age of the snowmobiles owned by survey respondents varied, with nearly 33% of recorded snowmobiles purchased in the last two years (22.4% in 2022 and 10.4% in 2023). Another 20% of snowmobiles were purchased between 2014-2018. In general, over 70% of snowmobiles (old or new) were reported to be purchased in the last five years. Just under 25% of snowmobiles were reported to be 2022 or 2023 models, and nearly 44% of snowmobiles were manufactured within the previous five years.

Other annual expenses include insurance and permits. The Province of Ontario requires a trail permit on every machine active on the OFSC trails, and there are various types of Ontario snowmobile trail permits available to riders for their machines, as listed below. In total, there were 12,802 snowmobiles reported as having a trail permit. Survey respondents reported that 505 machines were without a permit of any kind. On the other hand, the Insurance Bureau of Canada confirmed to the OFSC that 162,230 snow vehicles were insured in the 2022-2023 season in the province.

¹⁰ Studies conducted in 2014 and 2019 by HCA included Key Informant Interviews. In this study various consultations were conducted to achieve the same objective.

The cost of purchasing a snowmobile was also examined. The average amount households spent on purchasing one or more snowmobiles in 2022-2023 was \$15,440.70. A total of 3031 snowmobiles were purchased in 2022-2023, in which 2,477 households were involved in purchasing at least one snowmobile.

Regarding food and beverage expenses for snowmobiling trips, this study found that, on average, households spent more on food and beverages at restaurants than in stores on any kind of trip (day trip, overnight, or tour). For day trips, households most frequently spent between \$0-50 on food and beverages and spent an average of \$280.26 in restaurants, up from the average of \$83.54 in the 2018-2019 report. The average spending in stores for food and beverages in stores also increased to \$129.25 this season from the \$39.55 average in 2018-2019. Respondents spent an average of \$258.60 for overnight trips at restaurants (up from \$188.56 in the 2018-2019 season) and \$129.21 in stores (up from \$66.82 in 2018-2019). Lastly, survey respondents reported spending \$312.72 on food and beverages at restaurants (up from \$318.57 in 2018-2019) and \$115.89, almost similar to the 2018-2019 season on food and beverages in stores while on tour. Overall, there is a significant increase in the average spending on food and beverages in this season compared to the 2018-2019 season.

The cost of fuel and oil is also a major expense for snowmobilers. Households spent an average of \$387.83 per day trip on fuel and oil for snowmobiles and \$340.77 for a towing vehicle. For overnight trips, the cost of fuel/oil was much higher, with average household spending on fuel for their snowmobile of \$682.10 and \$248.76 for a towing vehicle. For tours of four or more nights away from home, survey respondents, on average, spent \$350.55 on fuel or oil for their snowmobile and \$284.76 on fuel or oil for their towing vehicle.

Finally, snowmobilers reported on their accommodation costs when going on a snowmobiling overnight trip or tour. Snowmobilers have various accommodation options on trips or tours, such as private cottages, vacation homes, hotels, motels, lodges, and bed and breakfasts. A total of 1,931 snowmobilers reported on accommodation expenses for overnight trips, and 1,034 reported on accommodation expenses for tours. On average, households spent \$390.55 on accommodations for trips of 1-3 nights away from home and \$480.73 on accommodations per tour.

Economic Impact of Snowmobiling

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

Critical considerations and assumptions

In conducting the economic impact analysis, the following critical considerations and assumptions were established:

- The survey was sent to a list of contacts provided by the OFSC. This list includes those who purchased at least one permit over the last five years. As such, some survey respondents may no longer be active in snowmobiling. To mitigate this risk, survey respondents who indicated that they 'never' went on a snowmobiling trip during the 2022-2023 season and respondents who did not report any financial information were filtered out when calculating the financial totals.
- The OFSC sold approximately 98,000 permits for Ontario trails in 2022-2023.
- The Insurance Bureau of Canada confirmed that 162,230 snow vehicles were insured in 2022-2023. This figure represents an increase from 148,000 snow vehicles insured in 2018-2019.
- Data collected from OFSC District Directors indicated that the average suitable number of weeks for snowmobiling in Ontario was 11¹¹ weeks long.
- No economic impacts were attributed to the purchase of snowmobiles beyond those purchased in 2022 or 2023.
- In consultation with the Ministry of Tourism, the expenditures outlined in Table 29 below were attributed to the various Visitor Spending categories of the TRIEM model.

We started our projection estimates of the Ontario-wide snowmobiling activity and its economic impact with the most reliable figure of 162,230 snow vehicles insured in 2022-2023, according to the Insurance Bureau of Canada. According to the survey data, there is an average of 1.9 snowmobiles per household. The total number of households that reported expense data in the 2022-2023 season survey was 6,554.

Therefore, we estimated the total number of households in Ontario that were actively snowmobiling in the 2022-2023 season, as the total number of insured snowmobiles in Ontario divided by the average number of snowmobilers per household:

The total # of insured snowmobiles in Ontario	162,230
The average # of snowmobiles per household	1.9
Total # of households in Ontario that were actively snowmobiling in 2022-2023 season	85,384

¹¹ Weighted average of number of snowmobile suitable weather weeks weighed by district snowmobile frequency.

This results in estimated 85,384 active snowmobiling households in Ontario.

Given that our survey financial data was based on a sample of 6,545 households, it means that our sample can be projected to the total snowmobiling household population in the province by a factor, that is, active snowmobiling households (85,384) divided by sample size (6,545), which is 13.0.

Economic Impact Using TREIM

The \$1,481,341,545.73 in expenditures¹² by snowmobilers in Ontario were allocated to the TREIM input-output model¹³ in the following manner, as shown in Table 30.

Table 30: Inputs of Expenditures by Snowmobilers in Ontario by TREIM model category, 2022-2023

Visitor Spending	Expenditure(s)
Travel Service	\$79,698,373.93
Private Transportation - Rental	\$331,856.92
Private Transportation - Operation	\$1,142,492,599.69 ¹⁴
Accommodation	\$26,919,965
Food and Beverage - At Stores	\$9,968,962
Food and Beverage - At Restaurants	\$31,884,827
Recreation and Entertainment	\$1,232,389.64
Retail - Clothing	\$94,710,848
Retail - Other	\$94,101,723
Total	\$1,481,341,545.73

Using the above spending, the TREIM model produces estimates of impact on direct, indirect and induced GDP and employment, as well as total taxes. These results can be found in Table 31. The impact of snowmobile trails in Ontario was calculated as the following:

- GDP: \$1,138,742,954
- Employment: 9,307 jobs¹⁵
- Taxes: \$538,035,787

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

¹² As a footnote to this year's study, we note that while the frequency of trips has kept nearly the same with the 2018-2019 survey result, expenditure in almost all line items has increased dramatically. This is clearly an inflationary change between the 2018-2019 and 2022-2023 seasons.

¹³ Available at: <http://www.mtc.gov.on.ca/en/research/treim/treim.shtml>

¹⁴ Towing truck purchases were included at 25% of the reported cost for 2022-2023 to maintain a modest estimate given trucks will be multi-purpose.

¹⁵ It is important to note that although annual expenditures are only down slightly from the 2014 study, many of the higher expenditure categories, such as fuel costs, do not translate into increased job creation and therefore, despite similar overall impact figures, job creation impact is down by 40% since 2014.

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

Table 31: Total Visitor Spending, GDP, Employment and Total Taxes

		2022-2023
Gross Domestic Product (GDP)		
Direct	\$	704,614,153
Indirect	\$	195,901,160
Induced	\$	238,226,954
Total	\$	1,138,742,954
Employment (jobs)		
Direct		6,100
Indirect		1,529
Induced		1,678
Total		9,307
Total Taxes		
Federal	\$	238,887,223
Provincial	\$	258,161,174
Municipal	\$	40,987,390
Total	\$	538,035,787

As shown in Table 32 (below), snowmobiling in Ontario directly impacts a variety of industries. The direct GDP impact was found to be \$571,810,953.00. The top four industries impacted by snowmobiling in Ontario by direct GDP in 2022-2023 were:

1. Retail Trade: \$120,976,046.00
2. Other Services:¹⁶ \$65,638,526.00
3. Manufacturing: \$53,423,599.00
4. Travel Agencies: \$45,600,320

¹⁶ As per the industry categories used by TREIM, 'other services' refers to establishments engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products to ensure that they work efficiently. For this study, this category includes all snowmobile repair and maintenance.

Table 32: : Economic Impacts of Snowmobiling by Industry

Industry ^a	Impact on Ontario 2022-2023	
	Direct GDP	Total GDP
Crop and Animal Production	\$145,448	\$3,292,106
Forestry, Fishing and Hunting	\$4,165	\$503,012
Mining and Oil and Gas Extraction	\$0.00	\$6,634,352
Utilities	\$0.00	\$10,845,186
Construction	\$0.00	\$26,314,115
Manufacturing	\$53,423,599	\$82,450,826
Wholesale Trade	\$27,777,862	\$48,070,772
Retail Trade	\$120,976,046	\$142,333,604
Other Transportation and Warehousing	\$795,041	\$13,279,321
Ground Passenger Transportation (excl. Rail)	\$1,618	\$2,314,513
Information and Cultural Industries	\$52,870	\$15,600,410
Other Finance, Insurance, Real Estate and Renting and Leasing	\$18	\$82,593,955
Car Renting and Leasing	\$192,346	\$1,771,597
Owner Occupied Housing	\$0.00	\$29,578,308
Professional, Scientific and Technical Services	\$0.00	\$30,149,946
Other Administrative and Other Support Services	\$0.00	\$16,092,277
Travel Agencies	\$45,600,320	\$46,740,557
Education Services	\$482,616	\$6,612,718
Health Care and Social Assistance	\$72,761	\$7,074,160
Arts, Entertainment and Recreation	\$1,077,733	\$4,070,263
Accommodation Services	\$13,749,493	\$14,679,729
Food & Beverage Services	\$11,659,228	\$18,601,073
Other Services (Except Public Administration) ^b	\$65,638,526	\$72,636,275
Operating, Office, Cafeteria, and Laboratory Supplies	\$0.00	\$0.00
Travel & Entertainment, Advertising & Promotion	\$0.00	\$0.00
Transportation Margins	\$0.00	\$0.00
Non-Profit Institutions Serving Households	\$1,616,212	\$3,792,067
Government Sector	\$163,517	\$6,419,139
Net Indirect Taxes on Production	\$240,062,777	\$262,491,999
Total	\$571,810,953	\$929,119,909

^a The industry follows Statistics Canada's North America Industry Classification System (NAICS) Input-Output small aggregation industry classification. For more information visit [Statistics Canada NAICS 2017](https://www150.statcan.gc.ca/n1/pub/26-667-x/2017001/article/00001-eng.htm).

^b Establishments (not classified in any other sector) primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products.

Case Study – District 6

District 6 (Pembroke area) was reviewed separately from the province as a whole, as a case study, as it was ranked as the most visited district by survey respondents. Based on the estimation that 10.83%¹⁷ of trips took place in District 6 this year, a total of \$160,406,681 in expenditures were allocated to the TREIM input-output model using the closest Ontario Tourism Region. Table 32 (below) shows the expenditure breakdown for District 6.

Table 33: Inputs of Expenditures by Snowmobilers in District 6 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$8,630,118
Private Transportation - Rental	\$35,935
Private Transportation- Operation	\$123,714,511
Accommodation	\$2,915,021
Food and Beverage- At Stores	\$1,079,486
Food and Beverage- At Restaurants	\$3,452,640
Recreation and Entertainment	\$133,449
Retail- Clothing	\$10,255,739
Retail- Other	\$10,189,780
Total	\$160,406,681

Using the above spending, the TREIM model produces estimates of impact on direct, indirect and induced GDP and employment, as well as total taxes. These results can be found in Table 33. The impact of snowmobiling in District 6 was calculated as the following:

- GDP: \$95,918,192
- Employment: 805 jobs
- Taxes: \$50,768,889

Table 34: Total Visitor Spending, GDP, Employment and Total Taxes, District 6

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$70,860,147
Indirect	\$10,016,763
Induced	\$15,041,283
Total	\$95,918,192
Employment (Jobs)	
Direct	627
Indirect	82
Induced	97
Total	805
Total Taxes	
Federal	\$22,061,430
Provincial	\$25,232,392
Municipal	\$3,475,076
Total	\$50,768,899

¹⁷ This per cent is computed by aggregating frequencies of first, second and third preferred travel destinations.

Case Study – District 11

District 11 (North Bay area) was also reviewed separately from the province as a case study, as it was ranked as the second most visited District by survey respondents. Based on the estimation that 10.23% of trips took place in District 11 this year, a total of \$151,470,375 in expenditures were allocated to the TREIM input-output model using the closest Ontario Tourism Region. Table 34 (below) shows the expenditure breakdown for District 11.

Table 35: Inputs of Expenditures by Snowmobilers in District 11 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$8,149,331
Private Transportation - Rental	\$33,933
Private Transportation - Operation	\$116,822,338
Accommodation	\$2,752,625
Food and Beverage - At Stores	\$1,019,348
Food and Beverage - At Restaurants	\$3,260,293
Recreation and Entertainment	\$126,015
Retail - Clothing	\$9,684,389
Retail - Other	\$9,622,105
Total	\$151,470,375

Using the above spending, the TREIM model produces estimates of impact on direct, indirect and induced GDP and employment, as well as total taxes. These results can be found in Table 35. The impact of snowmobiling in District 11 was calculated as the following:

- GDP: \$90,508,366
- Employment: 765 jobs
- Taxes: \$51,424,472

Table 36: Inputs of Expenditures by Snowmobilers in District 11 by TREIM model category

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$66,248,811
Indirect	\$9,719,827
Induced	\$14,539,728
Total	\$90,508,366
Employment (Jobs)	
Direct	588
Indirect	80
Induced	97
Total	765
Total Taxes	
Federal	\$20,419,435
Provincial	\$23,591,295
Municipal	\$7,413,742
Total	\$51,424,472

Estimated Economic Impact for Low, Medium, and High Frequency Seasons

When referencing the 2014 report as a baseline for this study, it is essential to note that consultations with OFSC staff and key informant interviews characterized the 2013-2014 season as particularly good weather conditions throughout the province for snowmobiling. In contrast, the 2018-2019 season saw unusually poor weather conditions for snowmobiling in southwestern Ontario. Data collected from OFSC District staff also indicated that the 2022-2023 season was only marginally better than the 2018-2019 season with 11-week average across the region. Taking the 2013-2024 and the 2018-2019 seasons into consideration, it is reasonable to construct a high, medium and low estimate of the economic impact of snowmobiling in Ontario. We consider 2013-2014 to be high and 2018-2019 and the 2022-2023 seasons as low. The high, medium and low estimates correspond to a sensitivity analysis of the impact under different conditions.

Examining the average frequency of trips from the last two reports, we see that the frequency of day trips more than doubles in a high-frequency season (2013-2014 data) when compared to a low-frequency season (2018-2019 data). On the other hand, despite a similarly poor weather as in the 2018-2019 season spending and economic impact have risen significantly in the 2022-2023 season. The increase in spending can be explained by the approximately 15.5%¹⁸ increase in Canada's average Consumer Price Index (CPI) from 2018 to 2022.

Table 37: Frequency of Day Trips, Overnight Trips, and Tours in a Typical Season – Estimated Average

	2022-2023 (moderate frequency averages)	2018-2019 (low frequency Averages)	2013-2014 (high-frequency averages)	Estimated Season (medium frequency averages)
Day Trips	10	11	24	15
Overnight Trips	1.1	1.4	2.6	1.7
Tours	0.6	0.7	0.7	0.7

Using these high and low frequency benchmarks we can calculate a factor to use in constructing an impact projection with 2022-23 being given a factor of 1.0 for low. A medium impact is given a factor of 1.5 and a high impact year 2.0. Using these factors, the following tables have been constructed to provide a range of economic impacts based on frequency of snowmobiling trips.

¹⁸ Calculated based on Statistics Canada CPI Average

Estimated Economic Impact for a high frequency season:

The \$1,481,341,547 in expenditures by snowmobilers in Ontario from the 2022-2023 study was multiplied by a factor of 2.0. to estimate expenditure data for a high frequency season. The \$2,962,682,923 in expenditures was then allocated to the TREIM input-output model. [08]

Table 38: Total Visitor Spending, GDP, Employment and Total Taxes, Estimated High Frequency Impact

	High Frequency Estimate
Estimated Total Visitors' Spending	\$2,962,682,923
Gross Domestic Product (GDP)	
Direct	\$1,409,228,305
Indirect	\$391,802,321
Induced	\$476,453,907
Total	\$2,277,484,532
Employment (Jobs)	
Direct	12,200
Indirect	3,058
Induced	3,357
Total	18,615
Total Taxes	
Federal	\$477,774,445
Provincial	\$516,322,348
Municipal	\$81,974,780
Total	\$1,076,071,574

Using the above spending, the TREIM model produces estimates of impact on direct, indirect and induced GDP and employment, as well as total taxes. The impact of snowmobiling in Ontario was calculated as the following:

- GDP: \$2,277,484,532
- Employment: 18,615 jobs
- Taxes: \$1,076,071,574

In addition to these estimates for GDP, employment, and total taxes, an average multiplier of 2.0. can be applied to the expenditure data in order to estimate the total economic impact on the province. Therefore, a total of \$2,962,682,923 in expenditures would be expected to generate \$5,925,365,846 in economic activity across the province in a high frequency year.

Estimated Economic Impact for a medium frequency season:

To estimate the economic impact for a medium frequency season, the \$1,481,341,547 in expenditures was multiplied by a factor of 1.5. to estimate expenditure data. This resulted in an estimated \$2,222,012,195 in expenditures, which was then allocated to the TREIM input-output model.

Table 39: Total Visitor Spending, GDP, Employment and Total Taxes, Estimated Medium Frequency Impact

Medium Frequency Estimate

Estimated Spending	Total	Visitors'	\$2,222,012,195
Gross Domestic Product (GDP)			
Direct			\$1,056,921,230
Indirect			\$293,851,741
Induced			\$357,340,431
Total			\$1,708,113,402
Employment (Jobs)			
Direct			9,150
Indirect			2,293
Induced			2,518
Total			13,961
Total Taxes			
Federal			\$358,330,834
Provincial			\$387,241,761
Municipal			\$61,481,085
Total			\$807,053,681

Using the above spending, the TREIM model produces estimates of impact on direct, indirect, and induced GDP and employment, as well as total taxes. The impact of snowmobiling in Ontario was calculated as the following:

- GDP: \$1,708,113,402
- Employment: 13,961 jobs
- Taxes: \$807,053,681

In addition to these estimates for GDP, employment, and total taxes, an average multiplier of 2.0. can be applied to the expenditure data to estimate the total economic impact on the province. Therefore, a total of \$2,222,012,195 in expenditures would be expected to generate \$4,444,024,390 in economic activity across the province in a medium-frequency year.

Economic Impact for a low frequency season (2022-2023):

As the 2022-2023 snowmobiling frequency approximates a low-frequency season, as snowmobiling frequency and the average week of suitable weather resembles that of the 2018-2019 season, as opposed to the base year 2013-2014, which saw a high frequency. Hence, a multiplication factor of 1.0. would result in the expenditure data staying the same. As seen previously in the report, the \$1,481,341,547 in expenditures by snowmobilers in Ontario was allocated to the TREIM input-output model, providing the following estimates of impact on GDP, employment, and taxes:

Table 40: Total Visitor Spending, GDP, Employment and Total Taxes, low frequency impact

Low Frequency (2022-2023)	
Total Visitors' Spending	\$1,481,341,463
Gross Domestic Product (GDP)	
Direct	\$704,614,153
Indirect	\$195,901,160
Induced	\$238,226,954
Total	\$1,138,742,954
Employment (jobs)	
Direct	6,100
Indirect	1,529
Induced	1,678
Total	9,307
Total Taxes	
Federal	\$238,887,223
Provincial	\$258,161,174
Municipal	\$40,987,390
Total	\$538,035,787

Using the above spending, the impact of snowmobiling in Ontario was calculated as the following:

- GDP: \$1,138,742,954
- Employment: 9,307 jobs
- Taxes: \$538,035,787

As with the previous two sections, an average multiplier of 2.0. can be applied to the expenditure data in order to estimate the total economic impact on the province. A total of \$1,481,341,547 in expenditures would be expected to generate \$2,962,682,926 in economic activity across the province in a low frequency year.

Summary of Impact Assessment

During the 2022-2023 snowmobiling season, snowmobilers made \$1,481,341,547 worth of expenditures riding in the province. According to the TREIM output tables, direct employment from the season's snowmobiling expenditures resulted in employment totalling an estimated 9,307 full-time equivalent jobs and over \$538,216 million in taxes across three levels of government: \$238,887,223 million in federal taxes, \$258,161,174 million in provincial taxes, and \$40,987,390 million in municipal taxes.

Not all industries have been affected equally. Retail Trade, Other Services (e.g. motor vehicle maintenance and repairs), Manufacturing, and other Services and travel agencies benefitted the most from snowmobiling activity in Ontario this season. In contrast, other industries, such as Utilities or Professional, Scientific and Technical Services did not see any direct impact on GDP. It is also important to note that many higher expenditure categories, such as fuel costs, do not translate into increased job creation, which may explain why job creation is down by 40% since 2014.

Some areas of the province are also likely to see more direct benefit from snowmobiling activity than others. Survey responses showed Districts 6 & 11 were the most visited districts in 2022-2023. The direct expenditures related to snowmobiling in District 6 and District 11 totalled \$160,406,681 and \$151,470,375, respectively. Direct employment from the season's snowmobile expenditures totaled 805 and 765 full-time equivalent jobs in District 6 and 11, respectively. Snowmobiling activity in these districts supported more than \$50 million (in District 6) and \$51 million (in District 11) in taxes among the three levels of government across the province for these two districts alone.

Table 41: Economic Impact of Snowmobiling in Districts 6 and 11

	District 6	District 11
Expenditures	\$160,406,681	\$151,470,375
Direct GDP	\$95,918,192	\$90,508,366
Direct Employment	805	765
Total Taxes	\$50,768,899	\$51,424,472

Regarding the total economic impact of snowmobiling in Ontario, the TREIM model only provides estimated GDP for their travel regions. However, a total \$1,481,341,546 in expenditures would generate \$2,962,682,926¹⁹ in economic activity across the province.

A comparison to previous study years (2018-2019, 2013-2014, 2004-2005, and 1996-1997) was also completed (see Table 37). It should be noted that a different assessment model was used for the first two seasons. There is a significant increase in direct expenditures, direct GDP, direct employment and total taxes from previous years, reversing the slight decrease in the 2018-2019 season. Notably, the frequency of trips decreased from 2014 to 2019 and stayed almost flat in 2023. However, the survey data reveals that average spending across all areas of expenditure has increased from 2019 to 2023 significantly and resulted in nearly doubling the spending. The increase in average cost is attributable partially to inflation, as confirmed by a 15.5% rise in Canada's average Consumer Price Index from 2018 to 2022. However, increases in expenditure far exceeded the rate of inflation. If weather conditions were to remain similar to the 2013-2014 conditions, the 2022-2023 expenditure trend could generate anywhere from 3 to 6 billion in economic activity in Ontario.

¹⁹ Based on an average multiplier of 2.0.

Table 42: Economic Impact of Snowmobiling Study Comparisons

	2022-2023	2018-2019	2013-2014	2004-2005^a	1996-1997
Direct Expenditures	\$1,481,341,546.	\$842,870,778	\$853,263,840	\$637,218,785	\$586 million
Direct GDP	\$704,614,153	\$665,704,327	\$369,416,786	----	\$322,604,014
Direct Employment	6,100	6,436 jobs	7,292 jobs	4,817 jobs	----
Total Taxes	\$538,035,787	\$216,439,151	\$332,781,171	\$274,865,668	
Total Economic Activity	\$2.9 Billion	\$1.6 Billion	\$1.7 Billion	\$1.2 Billion	----

^a Paula Neice and Associates. (2005); ^b Ecologistics Limited. (1998).

Economic Impact by District

The tables below provide the economic impact of recreational snowmobile trails by the OFSC district during the 2022-2023 season. These estimates were done using the expenditure data provided by survey respondents. Visitor spending for each district was calculated by proportional allocation of the total provincial expenditure into the OFSC district according to survey respondents' ride frequency in each district (see Table 13). District spending was then converted to Travel Regions based on the overlap of district versus TREIM Travel Region maps. TREIM generates economic impact figures by Travel Region. The economic impact figures for each travel region are, therefore, converted back to district economic impact figures²⁰.

The TREIM model allows assessments to be completed at the Ministry's Travel Region Level. Districts were aligned as best as possible to travel regions, as shown in Appendix D.

²⁰ We note that OFSC District versus Travel Region conversion ratios are estimates and do not reflect the density of snowmobiling trails or snowmobiling activity. There are 12 TREIM Travel Regions for the 16 OFSC Districts. The TREIM input-output model economic impact estimates at the Travel Region level could also reflect inter-district impact. Therefore, district economic impact projections are approximations of the portion of economic impact attributed from specific Travel Region or Regions to the overlapping OFSC districts.

District 1²¹

Table 43: Inputs of Expenditures by Snowmobilers in District 1 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$6,041,884
Private Transportation - Rental	\$25,158
Private Transportation - Operation	\$86,611,645
Accommodation	\$2,040,786
Food and Beverage - At Stores	\$755,741
Food and Beverage - At Restaurants	\$2,417,169
Recreation and Entertainment	\$93,427
Retail - Clothing	\$7,179,970
Retail - Other	\$7,133,792
Total	\$112,299,570

Table 44: Total Visitor Spending, GDP, Employment and Total Taxes, District 1

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$53,736,108
Indirect	\$7,169,080
Induced	\$10,912,051
Total	\$71,817,239
Employment (Jobs)	
Direct	478
Indirect	57
Induced	69
Total	604
Total Taxes	
Federal	\$16,772,426
Provincial	\$19,289,781
Municipal	\$2,078,838
Total	\$38,141,045.64

²¹ District 1 spending was estimated at \$112,299,570, in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$71,817,239 in GDP, 604 jobs and \$16,772,462, \$19,289,781 and \$2,078,838 million in Federal, Provincial and Municipal taxes, respectively.

District 2²²

Table 45: Inputs of Expenditures by Snowmobilers in District 2 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$6,995,443
Private Transportation - Rental	\$29,128
Private Transportation - Operation	\$100,281,122
Accommodation	\$2,362,872
Food and Beverage - At Stores	\$8,75,015
Food and Beverage - At Restaurants	\$2,798,658
Recreation and Entertainment	\$108,172
Retail - Clothing	\$8,313,148
Retail - Other	\$8,259,683
Total	\$130,023,243

Table 46: Total Visitor Spending, GDP, Employment and Total Taxes, District 2

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$45,365,982
Indirect	\$7,308,655
Induced	\$10,628,367
Total	\$63,303,004
Employment (Jobs)	
Direct	397
Indirect	61
Induced	71
Total	529
Total Taxes	
Federal	\$14,153,879
Provincial	\$15,921,909
Municipal	\$2,474,932
Total	\$32,550,719.68

²² District 2 spending was estimated at \$130,023,243 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$63,303,004 in GDP, 529 jobs and \$14,153,879, \$15,921,909 and \$2,474,932 million in Federal, Provincial and Municipal taxes, respectively.

District 3²³

Table 47: Inputs of Expenditures by Snowmobilers in District 3 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$3,357,492
Private Transportation - Rental	\$13,980
Private Transportation - Operation	\$48,130,344
Accommodation	\$1,134,071
Food and Beverage - At Stores	\$419,967
Food and Beverage - At Restaurants	\$1,343,228
Recreation and Entertainment	\$51,917
Retail - Clothing	\$3,989,930
Retail - Other	\$3,964,269
Total	\$62,404,199

Table 48: Total Visitor Spending, GDP, Employment and Total Taxes, District 3

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$45,365,982
Indirect	\$7,308,655
Induced	\$10,628,367
Total	\$63,303,004
Employment (Jobs)	
Direct	397
Indirect	61
Induced	71
Total	529
Total Taxes	
Federal	\$14,153,879
Provincial	\$15,921,909
Municipal	\$2,474,932
Total	\$32,550,719.68

²³ District 3 spending was estimated at \$62,404,199 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$63,303,004 in GDP, 529 jobs and \$14,153,879, \$15,921,909 and \$2,474,932 million in Federal, Provincial and Municipal taxes, respectively.

District 4²⁴

Table 49: Inputs of Expenditures by Snowmobilers in District 4 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$2,419,959
Private Transportation - Rental	\$10,076
Private Transportation - Operation	\$34,690,606
Accommodation	\$817,397
Food and Beverage - At Stores	\$302,697
Food and Beverage - At Restaurants	\$968,150
Recreation and Entertainment	\$37,420
Retail - Clothing	\$2,875,797
Retail - Other	\$2,857,301
Total	\$44,979,403

Table 50: Total Visitor Spending, GDP, Employment and Total Taxes, District 4

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$20,495,765
Indirect	\$3,627,596
Induced	\$5,079,943
Total	\$29,203,304
Employment (Jobs)	
Direct	179
Indirect	30
Induced	34
Total	243
Total Taxes	
Federal	\$6,502,323
Provincial	\$7,286,882
Municipal	\$1,082,968
Total	\$14,872,173

²⁴ District 4 spending was estimated at \$44,979,403 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$29,203,304 in GDP, 243 jobs and \$6,502,323, \$7,286,882 and \$1,082,968 million in Federal, Provincial and Municipal taxes, respectively.

District 5²⁵

Table 51: Inputs of Expenditures by Snowmobilers in District 5 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$2,604,260
Private Transportation - Rental	\$10,844
Private Transportation- Operation	\$37,332,606
Accommodation	\$879,649
Food and Beverage- At Stores	\$325,750
Food and Beverage- At Restaurants	\$1,041,883
Recreation and Entertainment	\$40,270
Retail- Clothing	\$3,094,815
Retail- Other	\$3,074,911
Total	\$48,404,987

Table 52: Total Visitor Spending, GDP, Employment and Total Taxes, District 5

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$23,947,061
Indirect	\$3,479,233
Induced	\$5,158,742
Total	\$32,585,038
Employment (Jobs)	
Direct	211
Indirect	29
Induced	38
Total	279
Total Taxes	
Federal	\$7,467,972
Provincial	\$8,526,824
Municipal	\$1,218,797
Total	\$17,213,593

²⁵ District 5 spending was estimated at \$48,404,987 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$32,585,038 in GDP, 279 jobs and \$7,467,972, \$8,526,824 and \$1,218,797 million in Federal, Provincial and Municipal taxes, respectively.

District 6²⁶

Table 53: Inputs of Expenditures by Snowmobilers in District 6 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$8,630,118
Private Transportation - Rental	\$35,935
Private Transportation- Operation	\$123,714,511
Accommodation	\$2,915,021
Food and Beverage- At Stores	\$1,079,486
Food and Beverage- At Restaurants	\$3,452,640
Recreation and Entertainment	\$133,449
Retail- Clothing	\$10,255,739
Retail- Other	\$10,189,780
Total	\$160,406,681

Table 54: Total Visitor Spending, GDP, Employment and Total Taxes, District 6

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$70,860,147
Indirect	\$10,016,763
Induced	\$15,041,283
Total	\$95,918,192
Employment (Jobs)	
Direct	627
Indirect	82
Induced	97
Total	805
Total Taxes	
Federal	\$22,061,430
Provincial	\$25,232,392
Municipal	\$3,475,076
Total	\$50,768,899

²⁶ District 6 spending was estimated at \$160,406,681 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$95,918,192 in GDP, 805 jobs and \$22,061,430, \$25,232,392 and \$3,475,076 million in Federal, Provincial and Municipal taxes, respectively.

District 7²⁷

Table 55: Inputs of Expenditures by Snowmobilers in District 7 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$6,795,116
Private Transportation - Rental	\$28,294
Private Transportation- Operation	\$97,409,383
Accommodation	\$2,295,207
Food and Beverage- At Stores	\$849,958
Food and Beverage- At Restaurants	\$2,718,513
Recreation and Entertainment	\$105,074
Retail- Clothing	\$8,075,085
Retail- Other	\$8,023,151
Total	\$126,299,782

Table 56: Total Visitor Spending, GDP, Employment and Total Taxes, District 7

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$45,365,982
Indirect	\$7,308,655
Induced	\$10,628,366
Total	\$63,303,004
Employment (Jobs)	
Direct	397
Indirect	61
Induced	71
Total	529
Total Taxes	
Federal	\$14,153,878
Provincial	\$15,921,908
Municipal	\$2,474,932
Total	\$32,550,719

²⁷ District 7 spending was estimated at \$126,299,782 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$63,303,004 in GDP, 529 jobs and \$14,153,878, \$15,921,908 and \$2,474,932 million in Federal, Provincial and Municipal taxes, respectively.

District 8²⁸

Table 57: Inputs of Expenditures by Snowmobilers in District 8 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$3,918,410
Private Transportation - Rental	\$16,316
Private Transportation- Operation	\$56,171,213
Accommodation	\$1,323,533
Food and Beverage- At Stores	\$490,129
Food and Beverage- At Restaurants	\$1,567,633
Recreation and Entertainment	\$60,591
Retail- Clothing	\$4,656,506
Retail- Other	\$4,626,558
Total	\$72,830,888

Table 58: Total Visitor Spending, GDP, Employment and Total Taxes, District 8

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$45,365,982
Indirect	\$7,308,655
Induced	\$10,628,366
Total	\$63,303,004
Employment (Jobs)	
Direct	397
Indirect	61
Induced	71
Total	529
Total Taxes	
Federal	\$14,153,878
Provincial	\$15,921,908
Municipal	\$2,474,932
Total	\$32,550,719

²⁸ District 8 spending was estimated at \$72,830,888 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$63,303,004 in GDP, 529 jobs and \$14,153,878, \$15,921,908 and \$2,474,932 million in Federal, Provincial and Municipal taxes, respectively.

District 9²⁹

Table 59: Inputs of Expenditures by Snowmobilers in District 9 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$4,791,839
Private Transportation - Rental	\$19,953
Private Transportation- Operation	\$68,691,994
Accommodation	\$1,618,554
Food and Beverage- At Stores	\$599,381
Food and Beverage- At Restaurants	\$1,917,065
Recreation and Entertainment	\$74,097
Retail- Clothing	\$5,694,459
Retail- Other	\$5,657,835
Total	\$89,065,176

Table 60: Total Visitor Spending, GDP, Employment and Total Taxes, District 9

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$42,162,687
Indirect	\$6,644,122
Induced	\$9,708,232
Total	\$58,515,040
Employment (Jobs)	
Direct	370
Indirect	55
Induced	66
Total	491
Total Taxes	
Federal	\$13,140,865
Provincial	\$14,830,740
Municipal	\$2,330,886
Total	\$30,302,491

²⁹ District 9 spending was estimated at \$89,065,176 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$58,515,040 in GDP, 491 jobs and \$13,140,865, \$14,830,740 and \$2,330,886 million in Federal, Provincial and Municipal taxes, respectively.

District 10³⁰

Table 61: Inputs of Expenditures by Snowmobilers in District 10 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$5,777,451
Private Transportation - Rental	\$24,057
Private Transportation- Operation	\$82,820,950
Accommodation	\$1,951,467
Food and Beverage- At Stores	\$722,665
Food and Beverage- At Restaurants	\$2,311,378
Recreation and Entertainment	\$89,338
Retail- Clothing	\$6,865,727
Retail- Other	\$6,821,571
Total	\$107,384,602

Table 62: Total Visitor Spending, GDP, Employment and Total Taxes, District 10

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$45,365,982
Indirect	\$7,308,655
Induced	\$10,628,367
Total	\$63,303,004
Employment (Jobs)	
Direct	397
Indirect	61
Induced	71
Total	529
Total Taxes	
Federal	\$14,153,879
Provincial	\$15,921,909
Municipal	\$2,474,932
Total	\$32,550,720

³⁰ District 10 spending was estimated at \$107,348,602 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$63,303,004 in GDP, 529 jobs and \$14,153,879, \$15,921,909 and \$2,474,932 million in Federal, Provincial and Municipal taxes, respectively.

District 11³¹

Table 63: Inputs of Expenditures by Snowmobilers in District 11 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$8,149,331
Private Transportation - Rental	\$33,933
Private Transportation- Operation	\$116,822,338
Accommodation	\$2,752,625
Food and Beverage- At Stores	\$1,019,348
Food and Beverage- At Restaurants	\$3,260,293
Recreation and Entertainment	\$126,015
Retail- Clothing	\$9,684,389
Retail- Other	\$9,622,105
Total	\$151,470,375

Table 64: Total Visitor Spending, GDP, Employment and Total Taxes, District 11

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$66,248,811
Indirect	\$9,719,827
Induced	\$14,539,728
Total	\$90,508,366
Employment (Jobs)	
Direct	588
Indirect	80
Induced	97
Total	765
Total Taxes	
Federal	\$20,419,435
Provincial	\$23,591,295
Municipal	\$7,413,742
Total	\$51,424,472

³¹ District 11 spending was estimated at \$151,470,375 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$90,508,366 in GDP, 765 jobs and \$20,419,435, \$23,591,295 and \$7,413,742 million in Federal, Provincial and Municipal taxes, respectively.

District 12³²

Table 65: Inputs of Expenditures by Snowmobilers in District 12 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$5,456,927
Private Transportation - Rental	\$22,722
Private Transportation- Operation	\$78,226,167
Accommodation	\$1,843,203
Food and Beverage- At Stores	\$682,572
Food and Beverage- At Restaurants	\$2,183,146
Recreation and Entertainment	\$84,381
Retail- Clothing	\$6,484,827
Retail- Other	\$6,443,120
Total	\$101,427,065

Table 66: Total Visitor Spending, GDP, Employment and Total Taxes, District 12

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$39,295,893
Indirect	\$5,070,479
Induced	\$7,706,675
Total	\$52,073,047
Employment (Jobs)	
Direct	350
Indirect	41
Induced	49
Total	440
Total Taxes	
Federal	\$12,243,048
Provincial	\$14,129,244
Municipal	\$1,567,444
Total	\$27,939,736

³² District 12 spending was estimated at \$101,427,066 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$39,295,893 in GDP, 440 jobs and \$12,243,048, \$14,129,244 and \$1,567,736 million in Federal, Provincial and Municipal taxes, respectively.

District 13³³

Table 67: Inputs of Expenditures by Snowmobilers in District 13 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$2,516,116
Private Transportation - Rental	\$10,477
Private Transportation- Operation	\$36,069,040
Accommodation	\$849,876
Food and Beverage- At Stores	\$314,725
Food and Beverage- At Restaurants	\$1,006,619
Recreation and Entertainment	\$38,907
Retail- Clothing	\$2,990,067
Retail- Other	\$2,970,837
Total	\$46,766,665

Table 68: Total Visitor Spending, GDP, Employment and Total Taxes, District 13

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$33,876,255
Indirect	\$4,362,450
Induced	\$606,071,407
Total	\$44,840,855
Employment (Jobs)	
Direct	302
Indirect	35
Induced	42
Total	379
Total Taxes	
Federal	\$10,554,629
Provincial	\$12,189,269
Municipal	\$1,356,408
Total	\$24,100,306

³³ District 13 spending was estimated at \$46,766,665 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$44,840,855 in GDP, 379 jobs and \$10,554,629, \$12,189,269 and \$1,356,408 million in Federal, Provincial and Municipal taxes, respectively.

District 14³⁴

Table 69: Inputs of Expenditures by Snowmobilers in District 14 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$6,025,857
Private Transportation - Rental	\$25,091
Private Transportation- Operation	\$86,381,906
Accommodation	\$2,035,372
Food and Beverage- At Stores	\$753,736
Food and Beverage- At Restaurants	\$2,410,757
Recreation and Entertainment	\$93,179
Retail- Clothing	\$7,160,925
Retail- Other	\$7,114,870
Total	\$112,001,693

Table 70: Total Visitor Spending, GDP, Employment and Total Taxes, District 14

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$39,295,893
Indirect	\$5,070,479
Induced	\$7,706,675
Total	\$52,073,047
Employment (Jobs)	
Direct	350
Indirect	41
Induced	49
Total	440
Total Taxes	
Federal	\$12,243,048
Provincial	\$14,129,244
Municipal	\$1,567,444
Total	\$27,939,736

³⁴ District 14 spending was estimated at \$112,001,693 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$52,073,047 in GDP, 440 jobs and \$12,243,048, \$14,129,244 and \$1,567,444 million in Federal, Provincial and Municipal taxes, respectively.

District 15³⁵

Table 71: Inputs of Expenditures by Snowmobilers in District 15 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$4,992,166
Private Transportation - Rental	\$20,787
Private Transportation- Operation	\$71,563,733
Accommodation	\$1,686,219
Food and Beverage- At Stores	\$624,438
Food and Beverage- At Restaurants	\$1,997,210
Recreation and Entertainment	\$77,195
Retail- Clothing	\$5,932,521
Retail- Other	\$5,894,367
Total	\$92,788,637

Table 72: Total Visitor Spending, GDP, Employment and Total Taxes, District 15

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$33,876,255
Indirect	\$4,362,450
Induced	\$6,602,150
Total	\$44,840,855
Employment (Jobs)	
Direct	302
Indirect	35
Induced	42
Total	379
Total Taxes	
Federal	\$10,554,629
Provincial	\$12,189,269
Municipal	\$1,356,408
Total	\$24,100,306

³⁵ District 15 spending was estimated at \$92,788,637 in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$44,840,855 in GDP, 379 jobs and \$10,554,629, \$12,189,269 and \$1,356,408 million in Federal, Provincial and Municipal taxes, respectively.

District 17³⁶

Table 73: Inputs of Expenditures by Snowmobilers in District 17 by TREIM model category

Visitor Spending	Expenditure(s)
Travel Service	\$1,226,006
Private Transportation - Rental	\$5,105
Private Transportation- Operation	\$17,575,042
Accommodation	\$414,112
Food and Beverage- At Stores	\$153,353
Food and Beverage- At Restaurants	\$490,486
Recreation and Entertainment	\$18,958
Retail- Clothing	\$1,456,943
Retail- Other	\$1,447,573
Total	\$22,787,579

Table 74: Total Visitor Spending, GDP, Employment and Total Taxes, District 17

	2022-2023
Gross Domestic Product (GDP)	
Direct	\$15,218,907
Indirect	\$1,919,545
Induced	\$2,773,589
Total	\$19,912,042
Employment (Jobs)	
Direct	136
Indirect	15
Induced	16
Total	168
Total Taxes	
Federal	\$4,742,253
Provincial	\$5,516,292
Municipal	\$633,138
Total	\$10,891,682

³⁶ District 17 spending was estimated at \$22,787,579, in the 2022-2023 season based on respondents' frequency of snowmobiling activity reported by respondents. The TREIM tourism region economic impact portion of the district showed a contribution of \$19,912,042 in GDP, 168 jobs and \$4,742,253, \$5,516,292, and \$633,138 million in Federal, Provincial and Municipal taxes, respectively.

Appendices

Appendix A: References Cited

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Appendix B: Survey Tool

SNOWMOBILE SURVEY 2023

Introduction

The Ontario Federation of Snowmobile Clubs (OFSC) has retained Harry Cummings and Associates, an independent consulting firm, to study the economic impact of snowmobile trails in Ontario as an update to a study completed in 2014.

As part of this study, we are asking snowmobilers from Ontario to complete a short survey. The survey should take approximately 10-15 minutes to complete.

Your input is very important to us, and we hope you will take some time to answer the questions. Your information remains confidential. You may choose not to participate or not to answer a specific question.

If you have any questions regarding the survey, please contact Harry Cummings and Associates at 519-823-1647 or email hca@hcaconsulting.ca. To confirm the validity of this survey, please contact Andrew Walasek at 705-739-7669 ext. 251 or email awalasek@ofsc.on.ca.

Thank you for your participation.

SNOWMOBILE SURVEY 2023

Snowmobiling in 2023

1. During the 2018-2019 season, did you snowmobile...

- ☒ More than most seasons
- ☐ About the same as most seasons
- ☐ Less than most seasons
- ☒ 2018-2019 was my first snowmobile season
- ☐ Not at all

SNOWMOBILE SURVEY 2023

Household Activity

We would like to get an idea of how the members of your household participate in snowmobiling.

Please answer the following questions for yourself and each individual in your household.

Please be CONSISTENT in your answers for each individual (the responses for "Person 1" in Questions 2-6 refers to you, and "Person 2" should be the same individual in each question).

2. What is the gender of each ACTIVE snowmobiler in your household?

Person 1

Person 2

Person 3

Person 4

Person 5

Person 6

Person 7

Person 8

3. What is the age of each ACTIVE snowmobiler in your household?

Person 1

Person 2

Person 3

Person 4

Person 5

Person 6

Person 7

Person 8

4. On average, how many times did each person participate in a short trip (1 day or less) on a snowmobile during the 2018-2019 season?

	6-7 per week	4-5 per week	2-3 per week	Once per week	Three times per month	Twice per month	Once a month	once a month	Never
Person 1	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 2	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 3	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 4	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 5	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 6	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 7	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 8	☐	☐	☐	☐	☐	☐	☐	☐	☐

5. On average, how many times did each person participate in a trip of 1-3 nights away from home on a snowmobile during the 2018-2019 season?

10 or

	more	9	8	7	6	5	4	3	2	1	Never
Person 1	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 2	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 3	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 4	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 5	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 6	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 7	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 8	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

6. On average, how many times did each person participate in a vacation/tour (more than 3 nights away from home) on a snowmobile during the 2018-2019 season?

	10 or more	9	8	7	6	5	4	3	2	1	Never
Person 1	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 2	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 3	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 4	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 5	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 6	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 7	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Person 8	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

SNOWMOBILE SURVEY 2023

Snowmobile(s)

We would like to get an idea of the snowmobiles owned by members of your household.

Please answer the following questions for each of the snowmobiles owned by members of your household.

Please be CONSISTENT in your answers for each snowmobile (the responses for "Snowmobile 1" in Questions 7-10 refers to your most recently purchased snowmobile, and "Snowmobile 2" should refer to the same snowmobile in each question).

7. In what year was each snowmobile manufactured?

Snowmobile 1

Snowmobile 2

Snowmobile 3

Snowmobile 4

Snowmobile 5

Snowmobile 6

Snowmobile 7

Snowmobile 8

8. In what year was each snowmobile purchased?

Snowmobile 1

Snowmobile 2

Snowmobile 3

Snowmobile 4

Snowmobile 5

Snowmobile 6

Snowmobile 7

Snowmobile 8

9. How much did each snowmobile cost?

Your answer must be formatted as a whole number without the dollar sign (e.g. 3000)

Snowmobile 1	
Snowmobile 2	
Snowmobile 3	
Snowmobile 4	
Snowmobile 5	
Snowmobile 6	
Snowmobile 7	
Snowmobile 8	

10. What is the make of each snowmobile and what type of permit is associated with each snowmobile?

	Permit	Make
Snowmobile 1		
Snowmobile 2		
Snowmobile 3		
Snowmobile 4		
Snowmobile 5		
Snowmobile 6		
Snowmobile 7		
Snowmobile 8		

Annual Expenses

11. The following are some typical expenses that snowmobilers have in order to participate in the activity. Please indicate how much money your HOUSEHOLD has spent on any of the items below during the 2018-2019 season.

Please note - fuel/oil costs will be recorded in the following question. Please do not record fuel/oil costs in this question.

Your answer must be formatted as a whole number without the dollar sign (e.g. 102)

OFSC Trail Permit

Trail permit for another area (e.g. Quebec)

Snowmobile insurance

Repairs and service

Snowmobile clothing (coat, pants, gloves)

Safety equipment (helmet)

Snowmobile trailer

Towing vehicle (truck/SUV to pull snowmobile trailer)

Snowmobile Accessories (mechanical/cosmetic upgrades)

Other (please specify below)

12. Please specify "Other" as indicated in the previous question.

Trips and Tours

We would like to get an idea of the types of trips in which your household participates, including (A) day trips, (B) overnight trips of 1-3 nights away from home, and (C) overnight trips of more than 3 nights away from home.

For the following questions, please only consider trips or tours made in Ontario. Do NOT include trips made outside of Ontario.

13. This season (2018-2019), approximately how much did your HOUSEHOLD spend on each of the following categories during a typical snowmobiling outing of ONE DAY OR LESS?

Your answer must be formatted as a whole number without the dollar sign (e.g. 102)

Food and Beverage - Restaurant

Food and Beverage - Store

Fuel/Oil for Snowmobile

Fuel for Tow Vehicle

Service and Repairs

Souvenirs/Retail Purchases

Activity Fees and Entertainment

Snowmobile Rental

Other Goods or Services (please specify below)

14. Please describe the "Other Goods and Services" you indicated purchasing on a snowmobiling outing of one (1) day or less.

15. This season (2018-2019), approximately how much did your HOUSEHOLD spend in total on each of the following categories during a typical overnight snowmobiling outing of ONE TO THREE NIGHTS AWAY FROM HOME?

Your answer must be formatted as a whole number without the dollar sign (e.g. 102)

Accommodation or Lodging

Food and Beverage - Restaurant

Food and Beverage - Store

Fuel/Oil for Snowmobile

Fuel for Tow Vehicle

Service and Repairs

Souvenirs/Retail Purchases

Activity Fees and Entertainment

Snowmobile Rental

Other Goods or Services (please specify below)

16. Please describe the "Other Goods and Services" you indicated purchasing on a typical overnight snowmobiling outing of one to three nights.

17. This season (2018-2019), approximately how much did your HOUSEHOLD spend in total on each of the following categories during a typical tour/vacation of MORE THAN THREE NIGHTS AWAY FROM HOME?

Your answer must be formatted as a whole number without the dollar sign (e.g. 102)

Accommodation or Lodging

Food and Beverage - Restaurant

Food and Beverage - Store

Fuel/Oil for Snowmobile

Fuel for Tow Vehicle

Service and Repairs

Souvenirs/Retail Purchases

Activity Fees and Entertainment

Snowmobile Rental

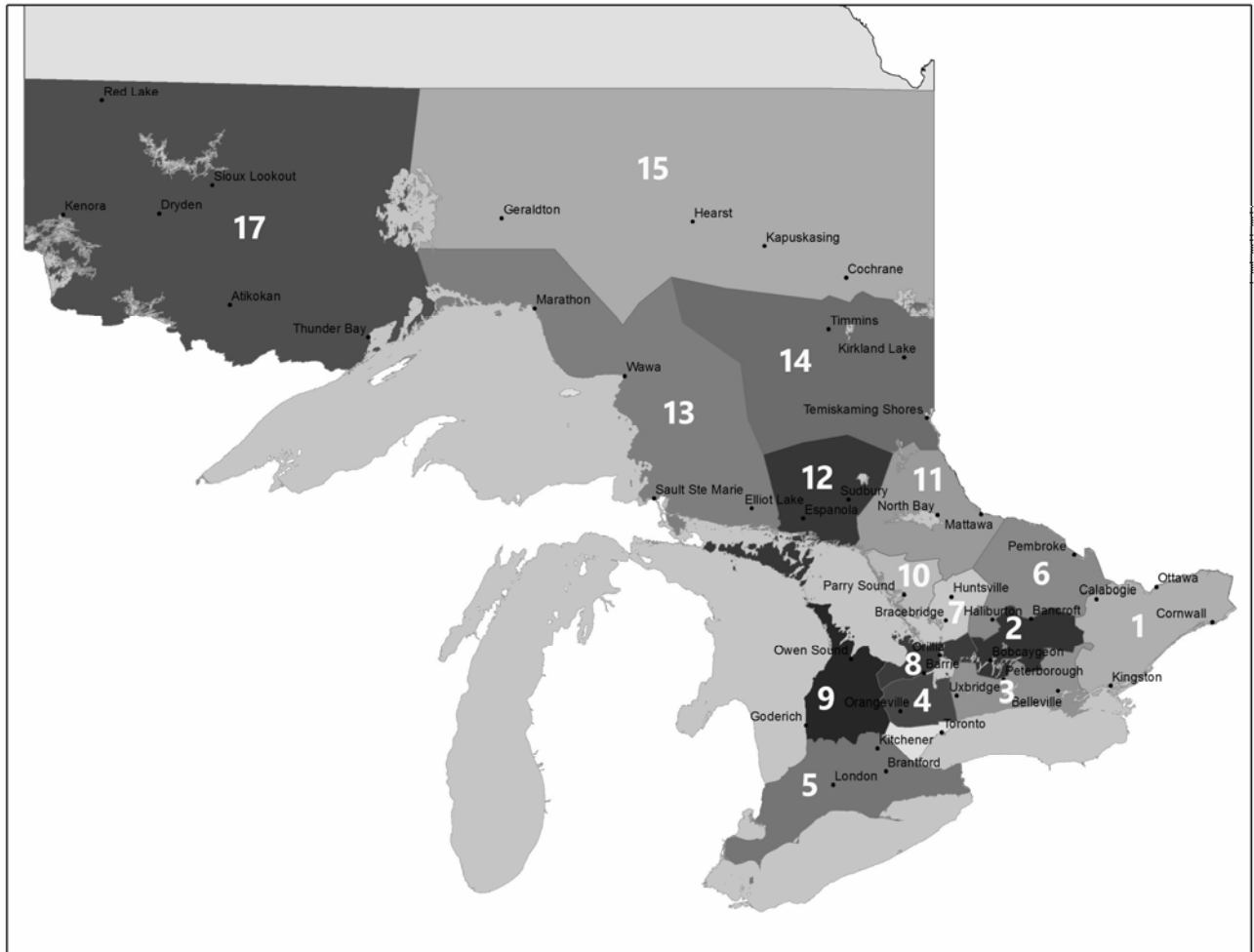
Other Goods or Services (please specify below)

18. Please describe the "Other Goods and Services" you indicated purchasing on a typical vacation/tour snowmobiling outing of more than three nights.

SNOWWMOBILE SURVEY 2023

Snowmobiler Profile

For questions 19-21, please refer to the map of the OFSC Districts



19. Which OFSC District do you live in and which 3 OFSC Districts do you snowmobile in most often during a typical season?

	District
I live in this OFSC District	
I have a vacation residence in this OFSC District	
I snowmobile most often in this OFSC District	
I snowmobile second most often in this OFSC District	
I snowmobile third most often in this OFSC District	

20. Which snowmobile club do you currently belong to? (please choose from the drop down menu below)

Other (please specify)

21. In which OFSC District(s) did you purchase your OFSC 2018-2019 Permit(s). You may select more than one District if the permits were purchased in multiple Districts.

☐	1	☐	2	☐	3	☐	4	☐	5	☐	6	☐	7	☐	8
☐	9														
☐	10														
	11	☐	12	☐	13	☐	14	☐	15	☐	17				

22. What is your current community of residence? (Note: If you live in a rural area, please respond with the closest town and/or urban area to you.)

Demographics

23. Including yourself, how many people live in your household?

Number of people:

24. Are you...

☒

Single

☒

Married/Common law

☐

Divorced/Separated

☒

Widowed

☒

Prefer not to answer

☒

Other (specify)

25. Gender

26. Into which of the following categories does your total household income before taxes fall?

☒

Under \$5,000

☒

\$5,000 to \$9,999

☐

\$10,000 to \$14,999

☐

\$15,000 to \$19,999

☒

\$20,000 to \$24,999

☒

\$25,000 to \$29,999

☒

\$30,000 to \$34,999

☐

\$35,000 to \$39,999

☐

\$40,000 to \$44,999

☒

\$45,000 to \$49,999

☒

\$50,000 to \$59,999

☒

\$60,000 to \$69,999

- ☐ \$70,000 to \$79,999
- ☐ \$80,000 to \$89,999
- ☒ \$90,000 to \$99,999
- ☒ \$100,000 to \$124,999
- ☐ \$125,000 to \$149,999
- ☐ \$150,000 to \$199,999
- ☒ \$200,000 and over
- ☒ Prefer not to answer

27. Please indicate your highest level of education completed.

- ☐ Less than high school
- ☐ High school
- ☒ Apprenticeship or trades certificate or diploma
- ☒ College, CEGEP or other non-university certificate or diploma
- ☒ University certificate, diploma or degree at bachelor level or above
- ☐ Bachelor's degree
- ☐ University certificate, diploma or degree above bachelor level
- ☒ Prefer not to answer

28. Are you or is anyone in your household employed by...?

- ☐ Ontario Federation of Snowmobile Clubs
- ☐ A snowmobile club or district
- ☐ A company or organization which manufactures, markets or sells snowmobiles or related products

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Thank You

29. That is the end of the survey. If you have any additional comments, please let us know. Thank you.

Appendix C: Ontario Ministry of Tourism, Culture, and Sport Regional Maps





