



Economic Benefits Assessment of ATV Riding Activities In Haliburton County

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For HAVTA

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Background

The Haliburton ATV Association (HAVTA) is interested in identifying the approximate annual economic benefits associated with ATV use in Haliburton County. Four surveys were conducted to determine the extent of ATV use and ATV-related spending that occurs annually in the region, as well to gauge general public and rider perceptions of the current ATV trail system: a business survey, a trail intercept survey, a resident survey and a riders' survey. These surveys are compiled and attached following this report.

Survey Findings

This report is based on survey results provided by the Haliburton ATV Club and compiled by the Haliburton Chamber of Commerce. The survey sample sizes are large enough to make valid assumption and conclusion estimates but without a full set of control surveys, the results cannot

be consider definitive and as such, there exists some margin of error. For this reason, there are often high and low results used and averaged. In some cases, non-participants are removed from the respondents calculations as not to skew the survey data.

It is recommended that a further trail intercept survey take place at several trail locations only for the purpose of validating the percentage of riders on the trails that are members or pass holders vs. non-members or riders without passes.

Business Survey

Overview of respondents

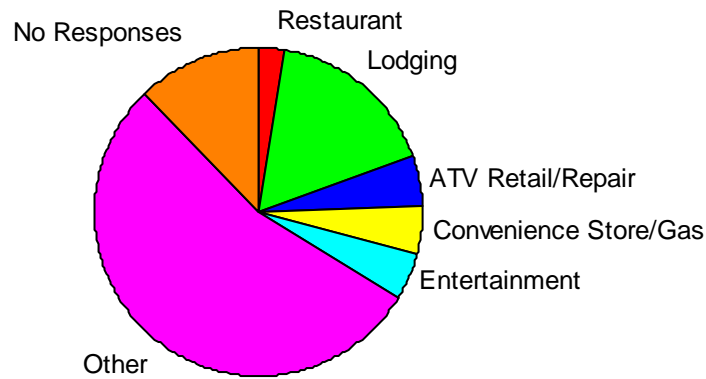
The HAVTA business survey had a total of 41 complete and partial respondents. All of the respondents were the representatives of a local business in Haliburton County. The types of businesses surveyed varied but a large majority were involved in the retail and service industries in various capacities.

This included lodging (17%), entertainment (4.8%), convenience store/gas (4.8%) and restaurants (2.4%). 53.6% of respondents reported they were involved in ‘other’ types of business. Responses reported for business types within in category of ‘other’ included heavy equipment construction, chamber of commerce, summer camp, law office, financial services, IT, business administration, travel agency, logging, transportation and various types of retail outlets and service providers.

17 of the 22 ‘other’ respondents had businesses that, like lodging, entertainment, convenience store/gas and restaurant businesses, profit directly from tourism to the area. For the purposes of this report, businesses that profit directly from tourism can be defined as those which

serve the needs of tourists primarily (ie. resorts, hotels) as well as those “allied industries” that, as a result of being located in a region that draws visitors, serve the needs of tourists either advertently or inadvertently (ie. food suppliers, retailers and other service providers). In total, approximately 75% of the businesses (86% controlling for the 5 non-responses) surveyed are those that profit directly from tourism to the area.

Business Survey Respondents



Because Haliburton County is a region so dominated by tourism, especially in the Summer peak season, it was not surprising that majority of the respondents surveyed by HAVTA indicated that Summer (63.4%) was the peak season for their business. Fall (12.1%) and Winter (14.6%) were also indicated as the peak seasons of some of businesses surveyed. There were no respondents that selected Spring as their peak season.

When asked to specify all of the changes they expected their business to experience in the next two years, the respondents supplied almost entirely positive answers. There were 33 total responses. One business plans to relocate, 20 businesses plan to expand, 13 businesses plan to

hire, 5 plan to offer new services and no businesses planned to lay off any employees, One respondent indicated that he or she expected to go out of business.

Here it should also be mentioned that this sample of respondents is almost evenly split between those who own ATVs and those who do not. 48.7% of respondents own an ATV or ATVs themselves whereas 43.9% do not. 7.3% of respondents did not supply an answer for this particular question.

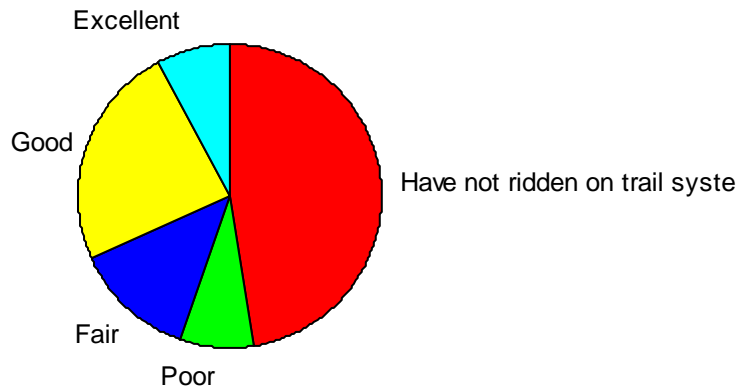
Local business perceptions of ATV and trail usage in Haliburton County

When businesses survey respondents were asked how they would rate the ATV trail system in Haliburton County on a scale of 1-5, the average rating was a 2.4. This rating of 2.4 was calculated by dividing the sum of all weighted ratings by the number of total responses. A rating of 2.4 suggests that businesses in Haliburton County believe the ATV trail system to be somewhere between “poor” (ie. needs significant improvement) and “fair” (ie. needs some improvement).

However, it should be noted that on this scale of 1-5, 1 was designated for respondents that had not ridden on the HATVA trail system. Eighteen people (47% of the total number of respondents for this question) selected 1 on the scale. This indicates two things: one, almost half of the respondents of the business survey have not experienced the HAVTA trail system first-hand, and two, the original average of 2.4 is negatively skewed because it automatically includes the responses of those people who have not used the ATV trail system on the low end of the Likert scale. Not having used the trail system, of course, does not imply that the respondent has a

negative view of the trail system. It is therefore useful to control for respondents that selected 1, having not used the trail system.

Rating HAVTA Trail System



In controlling for respondents that have not used the ATV trail system, the average is approximately 3.6, a much more accurate measure of survey respondent's perceptions. It is also a more unbiased measure as it excludes those respondents who do not possess the adequate background knowledge to answer the question fairly. This average indicates that the general perception of those respondents who *have* used the trail system in Haliburton County, is that the state of the system falls somewhere between "fair", where some improvement is needed, and "good".

When the business survey participants were asked to select actions that they believed would improve the ATV riding experience in the region of Haliburton County, there were a wide range of responses. "Protecting private property rights" was the most commonly selected action with 61.1% of respondents believing this would be a helpful improvement. Other popular answers included "improving trail maintenance" (50%), "developing a trail management system"

(47.2%), “extending the winter season by offering Winter trails and year round Haliburton Rail Trail use” (47.2%), creating additional trail signage (41.6%) and creating new trails (41.6%). The least frequently chosen responses were “adding new camping areas” (19.4%) and “developing new accommodations/restaurants” (19.4%).

When asked to choose the single most important improvement that should be made as per the responses above, the largest percentage of respondents (19.5%) chose “protecting private property rights”. “Creating new trails” (7.3%) and “improving trail maintenance” (7.3%) had the second largest percentage of respondents believing they would be the most important improvements.

When asked “would you support expansion of ATV use in the Haliburton region”, 70.7% of respondents selected ‘Yes’, 17.1% of respondents selected ‘No’ and 12.1% of respondents chose not to answer the question.

Additional comments supplied by respondents with regards to the potential expansion of ATV usage in the Haliburton region included:

“The economic impact is far greater with motorized sports than with biking and walking trails. The two can co-exist!”

“ATV use can be reached throughout most of the year and more people are looking at ATV use as more viable than snowmobiling in some cases due to cost as well as seasonal conditions. This sport would bring tremendous amount of revenue into the area.”

“[ATV riding is] an additional tourism activity that southern Ontario cannot offer. Therefore people have to come to Haliburton to experience ATV-ing.”

“Encouraging tourists to the area has a positive impact on everybody, regardless of their motivation for coming.”

“There are more ATV owners as our snowmobile industry struggles with weather conditions. ATVs can provide more use and recreation in all seasons.”

“[In] the last years, the only increase in tourism to the Gooderham area was from ATV traffic. We need to work together to attract more people to the area and remove the [trail] restrictions that give people a bad feeling...ATV traffic is making up a great deal of my business, but on a shorter stay (2-4 days average).”

When asked “would you support a regional HATVA Trail Management System” to make improvements to the ATV trail riding experience in the area, 68.2% of respondents selected ‘Yes’, 17.1% of respondents selected ‘No’, and 14.6% of respondent chose not to answer. Of those respondents that chose ‘Yes’, 65.8% stated that they were “in favour of a HATVA Trail Management System which would annually review the conditions of the trails, budget repair costs, and get approvals from land owners including the MNR.”

The majority of the businesses that were supportive of the expansion of ATV usage in Haliburton County were those that could be said to benefit directly from the influx of tourism ATV usage brings to the area (ie. lodgings, convenience store/gas, restaurants). Whereas the majority of those businesses opposed are those which may be less immediately impacted by tourism, particularly ATV tourism, to the area (law office, financial service, etc.).

When asked “how much might you or your business be willing to contribute annually for a trail management system”, 43.9% of respondents selected ‘\$0’, 19.5% selected ‘\$200 or more’, 12.1% selected ‘\$100’, 4.8% selected ‘\$25’ and 2.4% selected ‘\$150’. Therefore, the average amount businesses surveyed would be willing to contribute to a trail management system would be approximately \$60. However, this average uses the minimum of ‘\$200’ for those who selected the ‘\$200 or more’ category so realistically, \$60 would be a low estimate.

When survey respondents were asked whether they would volunteer their time, or the time of their employees to support a trail management system, 31.7% stated ‘Yes’, 58.5% stated ‘No’

and 9.7% did not respond. When asked if local tax dollars should be used to establish and maintain such a system, a little over half of respondents (51.2%) stated ‘Yes’, 41.4% stated ‘No’ and 7.3% did not respond. When asked whether they believe trail usage fees should be assessed to manage the system, an overwhelming majority of 78% stated ‘Yes’. Similarly, 75.6% of respondents stated ‘Yes’ when asked whether Ontario ATV registration/licensing fees should be spent to manage the proposed system.

Evidently, people are willing to support the facilitation of an ATV trail management system so long as the financial support for the system is coming directly from those individuals that make use of the trail system.

Additional comments supplied by respondents with regards to a potential ATV trail management system in the Haliburton County region included:

“This will go a long way to help build the integrity of the sport as well as build the membership base.”

“Information about the system is needed for long range planning and marketing programs.”
“A trail management group would become responsible for ATV-er actions. [We will need] a group to address [this issue] when necessary.”

“ATVs love rough trails. Keep the trees off [the trails] and let them ride. It’s too easy to over-manage.”

“The more information we have on trails, the better we will be able to keep ATVs aware of the conditions. We will also be better able to help in an emergency (search and rescue). The better maintained, the safer the trails are to ride, and the more enjoyable for all levels of skill to ride.”

“Any management system to control and improve [the trails] would be supported ATVs are not going away so strict management on trails, systems, policing, etc. would be supported.”

Reported impacts of ATV and trail usage on local businesses

When asked to report the amount of sales and/or revenue their business could attribute to ATVing in the past two years, respondents provided a wide-range of answers. 11 respondents reported zero, 5 respondents stated that they did not know and/or that the question was not applicable to their businesses, and there were several non-responses.

Those businesses that did notice revenue attributable to ATV ridership in the area, reported numbers that ranged from \$1500 to \$1.5 million. The average amount of revenue that the surveyed businesses generated in a period of two as a result of ATV related activities (including those who reported no attributed revenue) is approximately \$85,575.

It should be noted that this average was determined using businesses' general estimations of how much money they receive as a result of ATVs in the region and as such, it may be assumed that businesses considered this question in a direct sense. In other words, businesses likely looked at the direct, not indirect, impact of ATV riding on their business. Therefore, this average of \$85,575 is not necessarily inclusive of all possible ATV-attributable revenue by the surveyed businesses because most individuals would not normally consider, or be able to accurately measure, the business they have received indirectly as a result of ATV ridership in the area. For example, a convenience store owner may be able to determine a rough estimate of sales made to customers that arrive to their store on ATVs, but would have much more difficulty considering the customers whose businesses are supported in part by ATVs in the area and who, in turn, have the income necessary to make purchases from the store.

When businesses were asked what percentage of annual sales could be attributed to TV activities, answered ranged from 0% to 99%. The average percentage estimated by the

businesses surveyed was approximately 10%. Again, this percentage is not necessarily inclusive of all possible ATV-attributable revenue because it is unlikely that most respondents considered, or had the ability to accurately measure, the indirect impact of ATV ridership on their businesses.

Trail Intercept Survey

Overview of respondents

The trail intercept survey sample was comprised of 58 respondents in total, approximately 88% of which were males. When asked to disclose their highest level of education completed, most (approximately 85%) had at least received their high school diploma. 20% stated that they were high school graduates, 9% had a college degree, another 20% had completed “some college/technical school”, 15% had a university degree, and 18% were trained in a skilled trade.

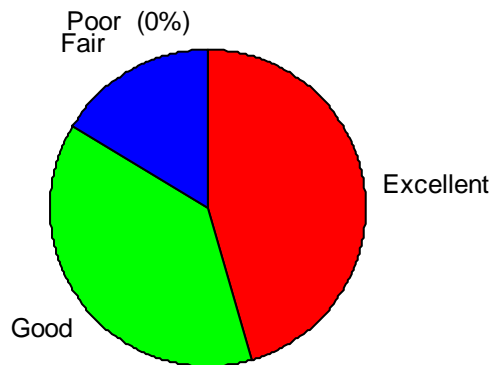
When asked to disclose their annual household income, 100% stated they made at least \$21,000 per year. The most common response provided was within the income range of \$81,000-\$100,000. 13.7% of respondents stated they made over \$100,000 in a year. 17.2% of respondents preferred not to answer and another 12% provided no response to the question.

Trail intercept survey respondents’ perceptions of ATV and trail usage in Haliburton County

When respondents were asked how they would rate existing trails in the Haliburton region on a scale of 1-4, where 1 is “excellent” and 4 is “poor”, needing significant improvement, the

average rank provided was 1.7. This suggests that respondents of this particular survey viewed the trail system quite favourably (somewhere between “excellent” and “good”).

Rating HAVTA Trail System



When asked how the ATV riding experience in the Haliburton County region might be improved, the most frequently selected answer was “creating additional signage” (67.9% noted this improvement) followed by “creating new trails/more trail miles” (54.7%) and “improving access to trailheads” (43.3%). Areas not commonly deemed as in need of improvement included “adding more police enforcement/regulation” (7.5%) and “lessening environmental impacts of ATV use” (7.5%). “Adding new camping areas” (9.4%) and “protecting private property rights” (11.3%) were also less pressing concerns amongst survey respondents. When asked to select just one improvement, respondents again most frequently chose “creating additional trail signage” followed by “creating new trails”.

When asked to rate the importance of several aspects of an ATV trail ride, respondents deemed “riding with friends”, “riding trails only”, “exploring new areas”, “trail signage” and “variety of terrain” as most important to their ATV experience. Aspects deemed less important included “access to intensive use areas”, “restaurants” and “relaxation”.

When survey respondents were asked whether having the Haliburton County Rail Trail closed in May impacts their decision to holiday in Haliburton County earlier than June, approximately 60% said no and 40% said yes. The largest proportion of respondents stated they would be willing to pay \$25 each year, in addition to the annual registration fee, to fund a trail management system. Only approximately 12% of respondents said they would not pay anything for the implementation and maintenance of such a system. Additionally, nearly half of respondents stated they would volunteer their time to help with trail maintenance in the Haliburton region.

Trail intercept survey respondents' direct economic impact on Haliburton County

Nearly 100% of respondents surveyed had come to Haliburton County specifically to either ride the ATV trails in the area (81%) or to attend a special ATV event (15.5%). When asked if it was their first time riding the trail, only 50% of respondents provided an answer. Of those who did answer the question, a little less than half stated no. This, of course, suggests that people will on occasion visit Haliburton County more than once to re-ride the same trail system.

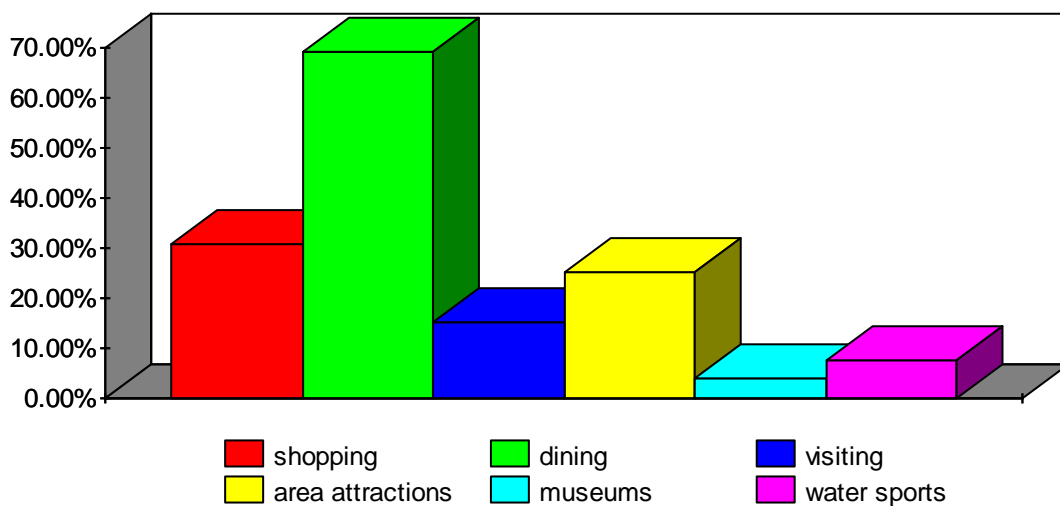
When asked whether they were on an overnight trip from home to attend the particular ATV event that provided the platform for this survey, a comparable number of respondents stated yes and no; that is, almost half of those who responded to the question planned to stay overnight in Haliburton County, as a result of their involvement in the ATV event. Of those respondents who stated they were staying overnight, nearly 75% of those that respondents were using hotel/motel accommodations. It was most common that the respondents were going to be staying in their overnight accommodation for two nights (22.4%) or three nights (13.7%).

A significant number of respondents make several trips to Haliburton County in a year for ATV trail riding getaways and ATV-related events, like the one that respondents were attending at the time that this survey was administered.

When asked specifically, “how many trips to this one do you take in the Haliburton region each year”, 17.2% stated 1, 18.9% stated 2, 13.7% stated between 3-4 and 8.6% stated between 5-6 trips per year. Two respondents stated that they take between 9 and 10 ATV related trips to the area in a year. Evidently, the majority of survey respondents are, and will likely continue to be, return visitors to the area. These individuals are drawn to Haliburton County, of course, because of their interest in ATV riding as a recreational activity, and the facilities the region has available for them to pursue these activities.

When asked what activities they, and/or their immediate travel group, will partake in whilst on their trip in Haliburton County, approximately 70% stated they will be dining, 30% said they will be shopping and 25% will visit area attractions.

Activities Partaken In During ATV Trips



Respondents were then asked to estimate the amount of money they and their immediate travel group would spend partaking in particular activities while they visit the Haliburton region. On average, respondents estimated that they would spend between \$200-\$299 on lodging, almost \$100 each on shopping/souvenirs and food and/or restaurants, between \$50-\$99 each on entertainment and gas, and approximately \$100-\$199 on transportation.

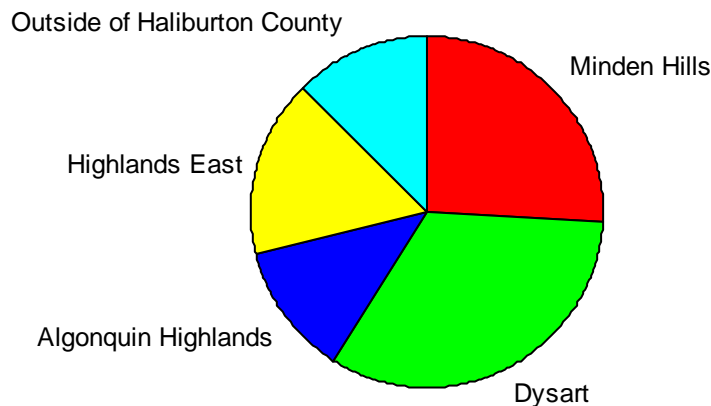
Adding up all the approximate averages for each spending activity and multiplying by the number of respondents that provided estimates for each particular spending activity, gives a total of \$21,715. This \$21,715 is the approximate amount that a group of 58 ATV riders might spend in Haliburton County during a two day period average.

Resident Survey

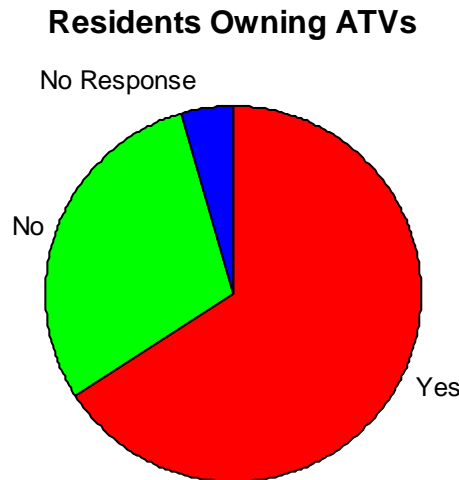
Overview of respondents

The HATVA resident survey sample was comprised of 43 respondents from various municipalities in and outside Haliburton County.

Resident Respondent Municipalities



Approximately 25% of respondents surveyed were from Minden Hills Township, 32% were from Dysart, 12% were from Algonquin Highlands, 16% were from Highlands East, and 12% were from outside of Haliburton County. 15 respondents (34%) classified themselves as “seasonal residents” whereas 29 residents (66%) classified themselves in the “year round resident” category. The majority of residents surveyed were ATV owners (66%). This percentage was reasonably divided between seasonal and full-time residents with approximately 66% of seasonal residents stating they were ATV owners and 65% of year round residents stating the same.



38.6% of respondents owned one ATV, 22.7% owned two ATVS, 2.2% owned three, 2.2% and another 2.2% owned five. 34% of respondents, presumably those who stated they did not own ATV, did not respond to this question.

These findings are consistent with a police services survey conducted several years ago across Haliburton County that determined one in every two households in the region owned at least one ATV.

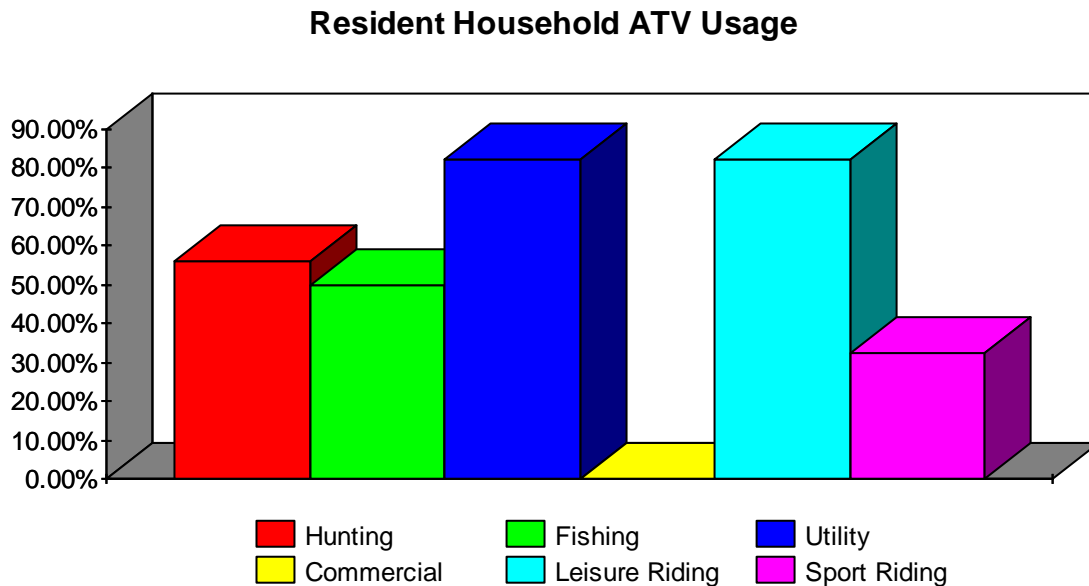
Over 70% of respondents reported that someone in their household had participated in ATV activities in the past year. 18% said one person participated, 30% said two people participated, 11% said three, 9% said four and 4.5% said six or more. Another 27% did not respond to this question, indicating that do not have anyone belonging to their household that has participated in ATV or ATV related activities in the past 12 months.

67% of respondents stated that they had riders in their household between the ages of 51-64, nearly 40% of respondents had riders in their households between the ages of 36-50, 18% had riders belonging to their household within the ages of 21-35, 21% had those between 16-21, 12% had those between 12-15 and another 12% had riders under 12 belonging to their household. 9% of respondents stated that they had a rider over age 65 in their household. Of those respondents that stated that they owned an ATV, 42% stated that each rider in their household has an ATV dedicated primarily to his/her use whereas 58% did not.

When respondents were asked whether they had completed a Safe Rider Training Course, 14% stated that they have done so, 20% stated that someone in their household has done so and nearly 70% stated that neither they nor anyone in their household have completed a safe rider's course. Those who have taken a Safe Rider Training Course tended to rate it's value favourably, with an average rating of 3.4 out of 4.

More than half of all respondents, including those who have not completed a Safe Rider Training Course, agreed that riders should be required to complete such a course. However, most people would not be willing to pay a significant fee for a safe rider's course. The majority would pay less than \$25 (16%) or as much as \$25-\$45 (another 16%), 9% would pay over \$100 and only one respondent survey said they would pay over \$150.

When ATV-owning respondents were asked how they use their ATVs, most mentioned “utility/work” (82.3%) and trail/leisure riding (82.3%). Other popular answers included hunting (55.8%), fishing (50%) and transportation (44%).



There were no respondents surveyed that specified that their household uses their ATV(s) for commercial endeavours or for competitive reasons (ie. racing). Those who stated that they use their ATVs recreationally commonly did so to experience nature/scenery (81.2%), spend time with friends/family (78.1%), get outdoors (78.1%), relax (68.7%), view wildlife (62.5%) and seek adventure (59.3%).

Resident perceptions of ATV and trail usage in Haliburton County

When asked to rank particular ATV Trail needs on a scale of 1-5, where 1 is very important and 5 is unimportant, respondents ranked “maintain existing trails” as most important with a score of

1.4. Other answers ranked as follows: “increase trail safety” (2.0), “enhance/expand existing trail systems” (2.1), “increase maps, signage and other educational materials” (2.1), “access to communities for non-ATV activities” (2.4), “construct new trails and riding areas” (2.4), “lengthen the trail riding season” (2.5), “provide support facilities such as trailhead parking and restrooms” (2.6), “provide camping areas near trail heads” (3.3), and “provide trails with camping areas” (3.3).

By ranking a variety of ATV trail features on a scale of 1-3, where 1 was “adequate”, 2 needed “some improvement” and 3 had “major improvement needed”, respondents were able to provide their perceptions with regard to the strengths and weaknesses of the current ATV trail system in Haliburton County.

The top ranked features overall were “trail map availability” (1.4), “safety of riding areas” (1.6), “campground areas near or at trailheads” (1.6), “diversity of trail systems” (1.6) and “trail pass/permit vendor locations” (1.6). As per the ranking scale, these features were considered close to, but slightly less than adequate by the collective group of respondents.

Some of the least favourably viewed features included “safe riding courses for children” (2.2), “tread lightly information (2.2) and “trail signage” (2.2). Even still, according to their rank, these features were more commonly perceived as needing some improvement, rather than requiring major improvement. Interestingly, the feature ranked 4th most in need of improvement was “awareness of tourism impact” (2.0). This suggests that not only were survey respondents generally aware of the impact ATV recreation has on the area’s tourism economy, but also that they felt more needed to be done to effectively promote the significance of this impact.

When asked to rank the potential of “existing problems facing ATV use in Haliburton County” using a Likert scale where 1 was “strongly agree” and 5 was “strongly disagree”, respondents agreed, on average, that trespassing (2.1) was an pertinent issue. Riding in illegal areas (2.2), excessive speed on trails (2.2) and failure to comply with rules and regulations (2.4) were also ranked highly among strongly agreed upon problems facing ATV use in Haliburton County. Apparent non-issues, also determined by averages of respondent’s ratings, included “too many rules and regulations” (3.8) and crowding on trails (3.3).

When survey respondents were asked whether they would be favour of having the Haliburton County Rail Trail, a trail system that runs between Kinmount to Haliburton, open in May rather than June of each year, a little over half stated yes (52.2%), 45.4 stated no, and 2.2% did not respond to the question.

Half of respondents surveyed do not use their ATVs for recreational purposes during the Winter months. Of those who do not make use of their ATVs during the off-season, nearly 30% stated they would do so if there were better facilities available for such activities. 25% of respondents stated no to the same question and approximately 45% of respondents did not respond. Presumably, the 45% are those who either do not own ATVs or who already partake in Winter ATV recreation.

Additional comments of interest provided by resident survey respondents with reference to ATV and trail usage in Haliburton County include:

“[It is] very hard to police all trails to ensure compliance. Adventurous, aggressive types tend to do the most damage and give the ATV community a bad rap. Encourage a neighbourhood watch approach to report specific dangerous behaviours or illegal acts.”

“Please keep our trails open... the rail trail is a big part of the system. The rail trail links so many trails and lets us get to many towns where we can buy gas/food. The small businesses also take advantage of this.”

“Climate changes have shortened the snowmobile season considerably from what it was 30 or so years ago. Many people have sold snowmobiles to buy ATVs. Increased winter ATVing opportunities can only benefit the local economy.”

“Interconnecting trails from other areas also will benefit tourism. Partial funding for trail maintenance and new trail creation must come from various levels of government.”

“It all boils down to the questions answered in #20 with the answer being "strongly agree". [There is] NOT ENOUGH POLICING on the trail.”

Rider Survey

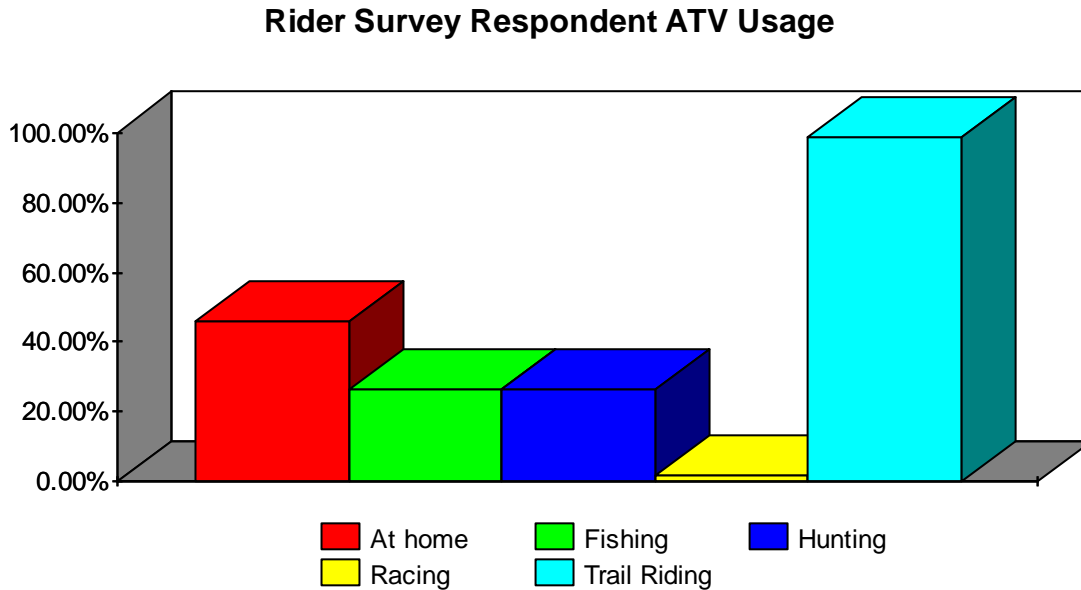
Overview of respondents

The rider survey sample was comprised on 200 respondents, 71% male and 7.5% female (and 21.5% non-responses).

When asked to disclose their highest level of education completed, most (approximately 85%) had at least received their high school diploma. 20% stated that they were high school graduates, 23.5% had a college degree, another 17% had completed “some college/ technical school”, 14% had a university degree, and 11.5% were trained in a skilled trade. When asked to disclose their annual household income, the most common response provided was \$100,000+. 31.5% of respondents stated they made over \$100,000 in a year. 22.5% of respondents preferred not to answer and another 13% provided no response to the question.

96.5% of respondents stated that they were ATV owners and 98.9% stated that they used their ATV(s) for trail riding and recreational purposes. It was also common for respondents to

state that they used the ATV(s) “on the farm/at home” (46.1%), hunting (26.6%) and fishing (another 26.6%).



Resident perceptions of ATV and trail usage in Haliburton County

When respondents were asked how they would rate existing trails in the Haliburton region on a scale of 1-4, where 1 is “excellent” and 4 is “poor”, needing significant improvement, the average rank provided was 1.8. This, again, suggests that respondents of this survey viewed the trail system favourably (somewhere between “excellent” and “good”).

When asked how the ATV riding experience in the Haliburton County region might be improved, the most frequently selected answer was “creating new trails/more trail miles” (70%) followed by “creating additional signage” (69.4%) and “improving access to trailheads” (60%).

Areas not commonly deemed as in need of improvement included “adding more police enforcement/regulation” (14.4%) and “lessening environmental impacts of ATV use” (17.2%).

Rating HAVTA Trail System



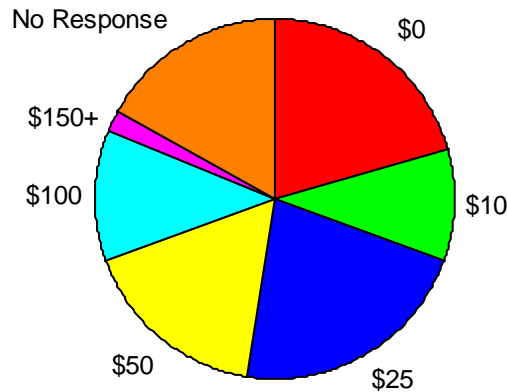
When asked to rate the importance of several aspects of an ATV trail ride, respondents deemed “riding with friends”, “riding with family”, “scenery”, “trail safety” and “trail signage” as most important to their ATV experience. Aspects deemed less important included “access to intensive use areas”, “restaurants”, “riding trails”, and “length of ride”.

81% of respondents surveyed do not use their ATVs in Haliburton County during the Winter months. Of those who do not ATV in Haliburton during the off-season, over 60% stated they would do so if there were better facilities available for such activities. 16.5% of respondents stated no to the same question and approximately 21% of respondents did not respond. 24% of respondents stated that they ride a snowmobile in Haliburton County during the Winter months.

When survey respondents were asked what they would be willing to pay each year, in addition to the annual registration fee, to fund a trail management system, 20.5% stated \$0, 10%

stated \$10, 22% stated \$25, 17% stated \$50, 11.5% stated \$100 and 2.0% (4 respondents) would be willing to pay over \$150.

\$ Willing To Spend on Trail Management



Rider survey respondents' direct economic impact on Haliburton County

When respondents were asked to specify how many people were in their immediate travel group, there were 183 responses. Answers ranged from 1-40. On average, it was calculated that there is approximately 8 people in per travel group.

Respondents were then asked to estimate the amount of money they and their immediate travel group would spend partaking in particular activities while on a visit to the Haliburton County region. On average, respondents estimated that they would spend approximately \$670 on lodging, \$270 on shopping/souvenirs, \$320 on food, drink and/or restaurants, \$280 on entertainment and admissions, \$250 on gas, \$220 on transportation, \$80 on convenience items, \$120 on ATV repairs, and \$210 on ATV-related equipment and gear. When respondents were

asked to provide an estimate of how much they have spent on ATVs and ATV related equipment in the past year, the average was approximately \$8000.

Conclusions

- Trail intercept survey respondents estimated per trip average money spent was \$250 for lodging, \$100 for shopping/souvenirs, \$100 for food and/or restaurants, \$75 for entertainment, \$75 for gas, \$150 for transportation, \$25 for convenience stores, \$25 for repairs and \$50 for ATV equipment and accessories. The average number of days spent on a trip was two, so this adds up to approximately \$850 spent by a group (the average number in a group for this survey was 3.25) in a two day period. This is about \$260 per person.
- According to HAVTA records, 1666 temporary passes were sold in 2010 and they estimate that only about 10% of riders purchase passes. Therefore, it seems reasonable to assume that Haliburton County receives approximately 16,660 riders on its trails in a year. Additionally, HAVTA has 400 year round members and 130 family year round member ATVs. 550 of the 650 year-round member ATVs (approximately 85%) come from outside of Haliburton County. If each of these riders is spending \$260, ATV riders in Haliburton County would spend approximately \$4,331,600. However, the trail intercept survey also determined that riders take an average of four ATV trips to

Haliburton County per year. Thus, this survey found that approximately \$17,326,400 is spent per year by visiting ATV riders to Haliburton County.

Trail Intercept Average Survey Respondent's Group Spending on ATV-Related Activities		
	Per Group	Per Person
lodging	\$250	\$79
shopping/souvenirs	\$100	\$30
food/restaurants	\$100	\$30
entertainment	\$75	\$23
gas	\$75	\$23
transportation	\$150	\$46
convenience	\$25	\$8
repairs	\$25	\$8
ATV equipment/accessories	\$50	\$16
<i>Approximate Total</i>	<i>\$850</i>	<i>\$260</i>

$\$850/3.25$ (average number of people in a group) = \$260 spending per person, per trip.
 Multiplied by 16,660 (number of riders per year) = \$4,331,600. Multiplied by 4 (average number of visits respondent took to Haliburton County per year) = \$17,326,400

- As mentioned previously, the respondents of the riders’ survey estimated their average per trip money spent was \$670 on lodging, \$270 on shopping/souvenirs, \$320 on food, drink and/or restaurants, \$280 on entertainment and admissions, \$250 on gas, \$220 on transportation, \$80 on convenience items, \$120 on ATV repairs, and \$210 on ATV-related equipment and gear. This adds up to an approximate amount of \$2420 for an average group of about 8 people, which per person equals \$302. Some of these averaged expenses, like gas to and from Haliburton County, could be skewed in that likely only one tank of gas was bought within Haliburton County.
- Again, with approximately 16,660 riders on Haliburton County trails per year, this average amount spent per person per this works out to about \$5,031,320. The average number of times that the riders surveyed made ATV trips to Haliburton County was 11 per year. Therefore, the rider survey found that approximately \$55,344,520 is spent by ATV riders in Haliburton County per year.

Riders’ Survey Respondent’s Group Spending on ATV-Related Activities		
	Per Group	Per Person
lodging	\$670	\$84
shopping/souvenirs	\$270	\$34
food/restaurants	\$320	\$40

entertainment	\$280	\$35
gas	\$250	\$31
transportation	\$220	\$28
convenience	\$80	\$10
repairs	\$120	\$15
ATV equipment/accessories	\$210	\$26
<i>Approximate Total</i>	\$2420	\$302

*\$2420/8 (average number of people in a group) = \$302 spending per person, per trip.
Multiplied by 16,660 (number of riders per year) = \$5,031,320. Multiplied by 11
(average number of visits respondent took to Haliburton County per year) = \$55,344,520*

- The rider survey results may be skewed somewhat by respondents that are members of various ATV clubs. The trail intercept survey results may be skewed somewhat by the low numbers of riders affiliated with any organized ATV club. One could look at the rider survey and the trail intercept survey as being high and low control groups respectively. It would seem reasonable to assume so.
- Averaging the rider survey result of \$55,344,520 on the top end of estimates with the trail intercept survey result of \$17,326,400 on the low end of estimates equals **\$36,335,460**

this report's final averaged approximation of the amount of money ATVs and ATV-related activities bring *directly* to Haliburton County each year.

- One must keep in mind that the direct expenses one normally associates with tourism can be very far reaching into the economy and beyond what it appears at face value. For example, there are approximately half a dozen HAVTA members that chose Haliburton County as a place of residence, to work or retire, because of the availability of organized ATV trails and the camaraderie of organized rides and events. When someone buys or builds a house or cottage related to their chosen form of ATV recreation, they are planted in Haliburton County and the economic benefit of this is ongoing as long as they are residents. This is just one example of the spin off effects of ATV tourism. These spin-off or “indirect” economic benefits were not taken into account when determining the final estimate of the amount of money ATVs and ATV-related activities bring to Haliburton County each year, as they could not be quantified by surveys data.