

Off-Highway Vehicle Association

Spending Survey 2015



Report on Direct Spending In Nova Scotia

Representing 12-Month Period Ending August, 2015

Research Conducted By:



Nova Insights Inc.

Market research for your most important decisions

Kentville, Nova Scotia

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1.0 BACKGROUND AND METHOD

Conducted over an eight-week period from June to August, 2015, this research—which included **844 households** containing OHV riders—has allowed the three OHV associations in Nova Scotia to gain insight into the profile and spending habits of riders throughout the province. With the inventory of OHVs in these households and actual population data on numbers of registered machines, these data can be projected to the population of OHV riders in Nova Scotia.

Working closely with staff and volunteers from the Snowmobile Association of Nova Scotia (SANS), Nova Scotia Off-Road Riders' Association (NSORRA), and the ATV Association of Nova Scotia (ATVANS) to develop the lines of questioning, Nova Insights interviewed riders of snowmobiles, off-road motorcycles, and ATVs. These respondents were able to report on the travel habits and spending for all riders within their households.

According to the **Nova Scotia Department of Natural Resources** and compiled by **Service Nova Scotia**, there are **6,220 snowmobiles**, **601 off-road motorcycles**, and **31,125 ATVs** registered for use off private property, as of December 31, 2014.

This survey of riders includes a sample of **844 OHV households** with **758 snowmobiles**, **269 off-road motorcycles**, and **1104 ATVs**. These data are then extrapolated proportionally to the population of registered machines. The sample also includes 836 snowmobile *riders*, 275 off-road motorcycle *riders*, and 1423 ATV *riders*.

Both online and inbound telephone (using toll-free number) methods were available for participants to complete the survey. However, all but one completed the survey online.

The results of this survey are based on those OHV households who chose to participate from the invitations sent from the three sponsoring organizations by email, Facebook, and newsletter announcements. Sampling error calculations are not designed to accommodate online surveys. Because the reach of the survey invitations was primarily the contact lists of the member organizations, these interviews may represent a more avid rider than average.

Interviewing was conducted June 17 – August 14, 2015 using a robust web survey tool administered by Nova Insights from Kentville, Nova Scotia. This tool was used for online interviews and by the interviewer for the telephone component.

The questionnaire was designed to only ask details about riding habits indicated by the household (e.g., type of OHVs, number of trips). Spending was divided broadly into “regular” outings and “special” outings. Each was then divided into spending on fuel,

Background and method

food and beverage, entertainment, lodging, and fees. They also had the opportunity to specify other related spending.

To help solicit the most accurate spending information, spending on regular outings was extrapolated to the aggregate based on the number of these outings specified by the respondent, and spending was recorded for each individual special outing. Separately, spending over the past 12 months on equipment, insurance, accessories, and fees were collected for all OHVs in the household as a group, to account for possible overlap in usage (e.g., trailers used for multiple OHV types).

Although all attempts were made to make the reporting of spending as easy as possible for respondents to recollect and record, these data ultimately are dependent on the accuracy of these riders' estimates of their spending over the past 12 months.

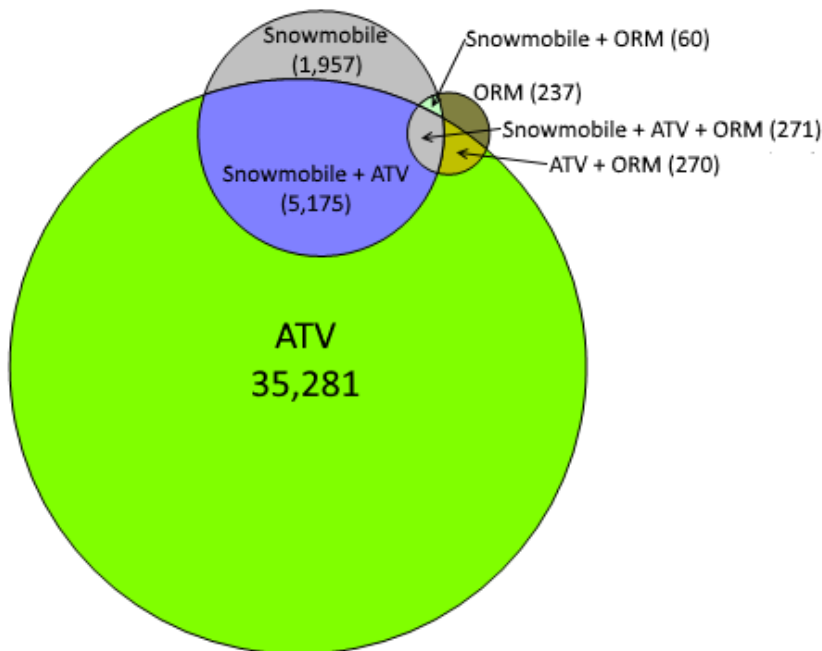
2.0 PROFILE

2.1 OHVs and Riders

According to data compiled by Service Nova Scotia, there are 37,946 OHVs registered for use off private property, as of December 31, 2014. Based on a projected sample, this represents 43,251 riders in 21,958 households — 2.0 riders per household and 0.88 OHVs per rider.

There is great deal of crossover among types of OHVs ridden. Among snowmobilers, 73% also ride an ATV, and 4% ride an ORM. Among ORM riders, 40% also ride a snowmobile, and 65% ride an ATV. Among ATV riders, 13% also ride a snowmobile and 1% ride an ORM.

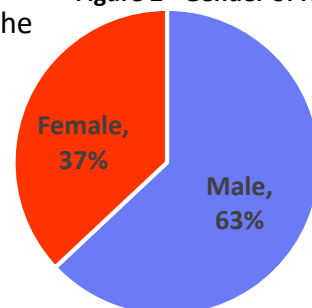
Figure 1 - Crossover riding



OHV riders are more likely male (63%) than female (37%). And the males were most likely the ones to complete the spending survey (91%).

The median household income for OHV riders is \$86,500 with 37% earning \$100,000 or more.

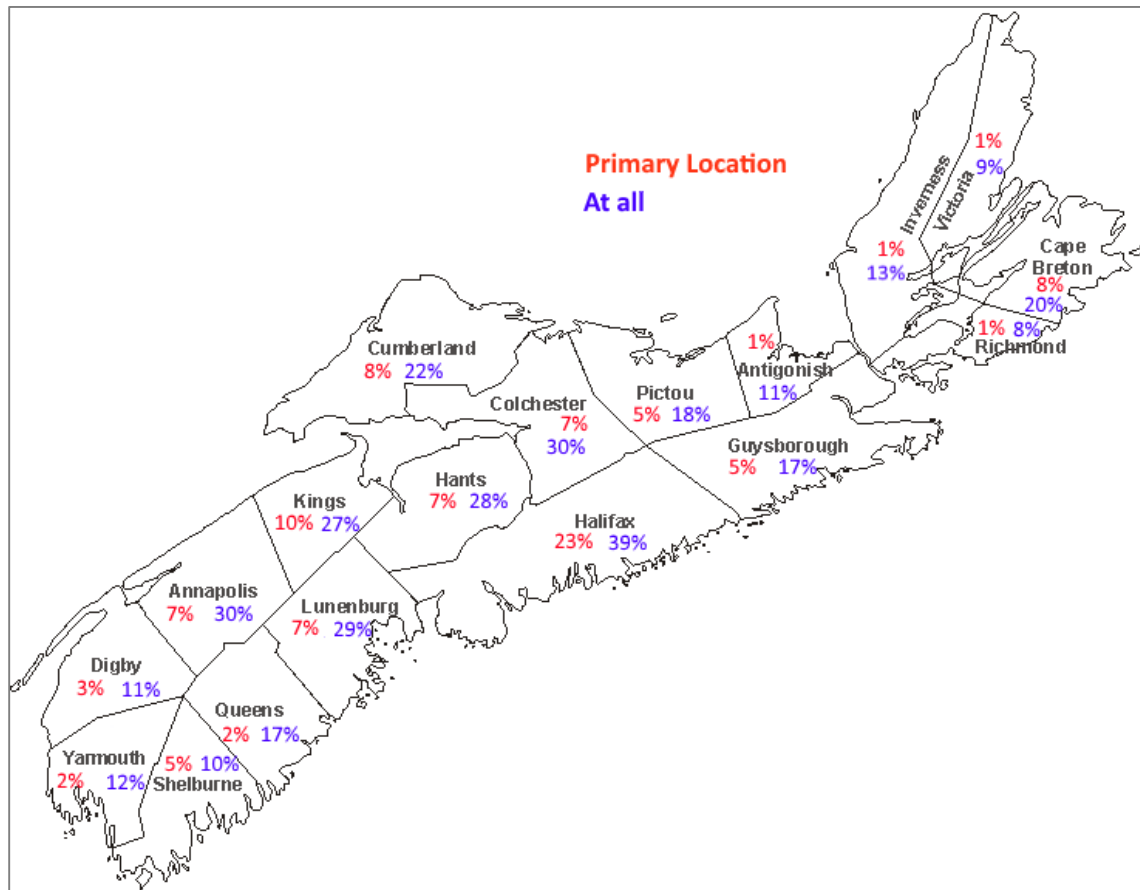
Figure 2 - Gender of riders



2.2 Riding patterns

When asked to identify what counties in Nova Scotia they ride, OHV riders most commonly say Halifax, followed by Colchester and Annapolis. They also most often say Halifax is their *primary* location for riding their OHV, but Kings County jumps to the second spot, followed by Cumberland.

Figure 3 - Location of OHV riding



In reporting on their [regular off-property outings](#) with their OHV, riders travel on average **48 kilometers (one-way) from home** for each outing, and made an average **12.8** of these outings in the past 12 months. They also spent an average of **1.5 nights away** from home with **3.0 passenger vehicles** and **7.5 people** in the group. There were **6.4 OHVs** ridden by the group.

In separately thinking about the [special outings](#) they made with their OHVs over the past 12 months, riders report traveling an average of **129 kilometers (one way)** for each, and made an average of **1.7** of these special outings (including those who said they had not made any). They spent **1.3 nights away** from home, took **3.8 passenger vehicles** and **6.7 OHVs** for **9.6 people** in the group.

3.0 HOUSEHOLD SPENDING

When riding an OHV off-property, there are several categories of expenses that encompass the vast majority of spending—fuel, food and beverage, entertainment, lodging, and fees. Riders reported the spending for their household in each of these categories separately for both their regular outings and special outings. This spending could then be aggregated by OHV type, outing type, and total.

Spending on equipment, accessories, insurance, and licensing is treated separately from outings as they often do not apply directly to an outing and may cover usage of multiple types of OHVs.

3.1 Spending per outing

OHV riders spend an average of \$251 on a regular outings, and \$327 on special outings.

Figure 5 - Average spending on regular outings

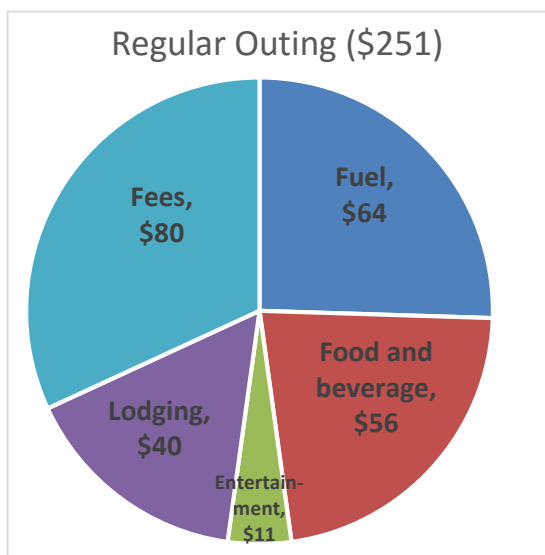
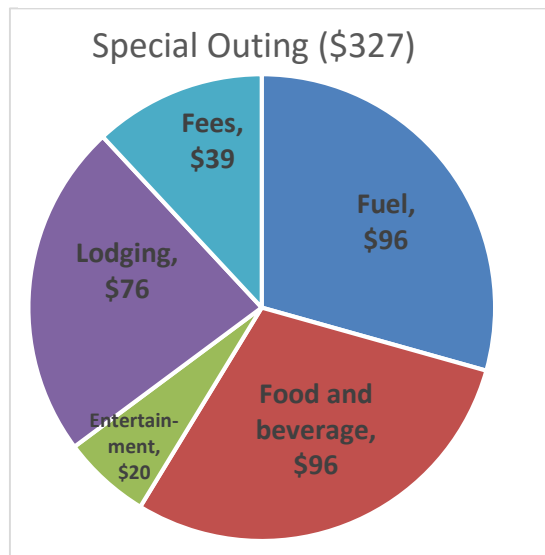


Figure 4 - Average spending on special outings



3.2 Annual spending on outings

Taking into account the number of these regular and special OHV outings in the past 12 months, these households on average spend a total of **\$2,492** on regular outings and **\$693** on their special outings.

Figure 7 - 12-month spending on regular outings

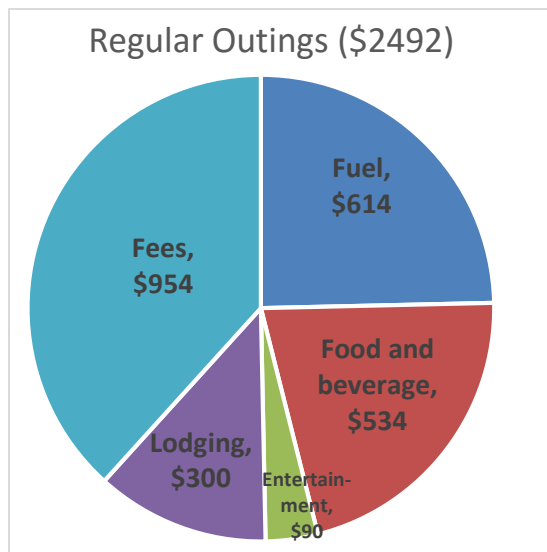
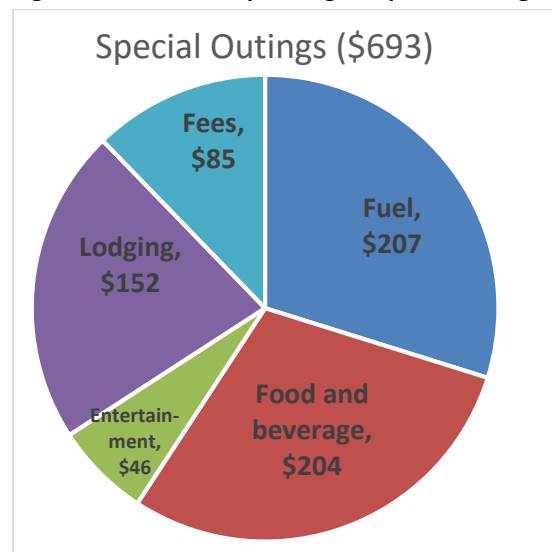


Figure 6 - 12-month spending on special outings

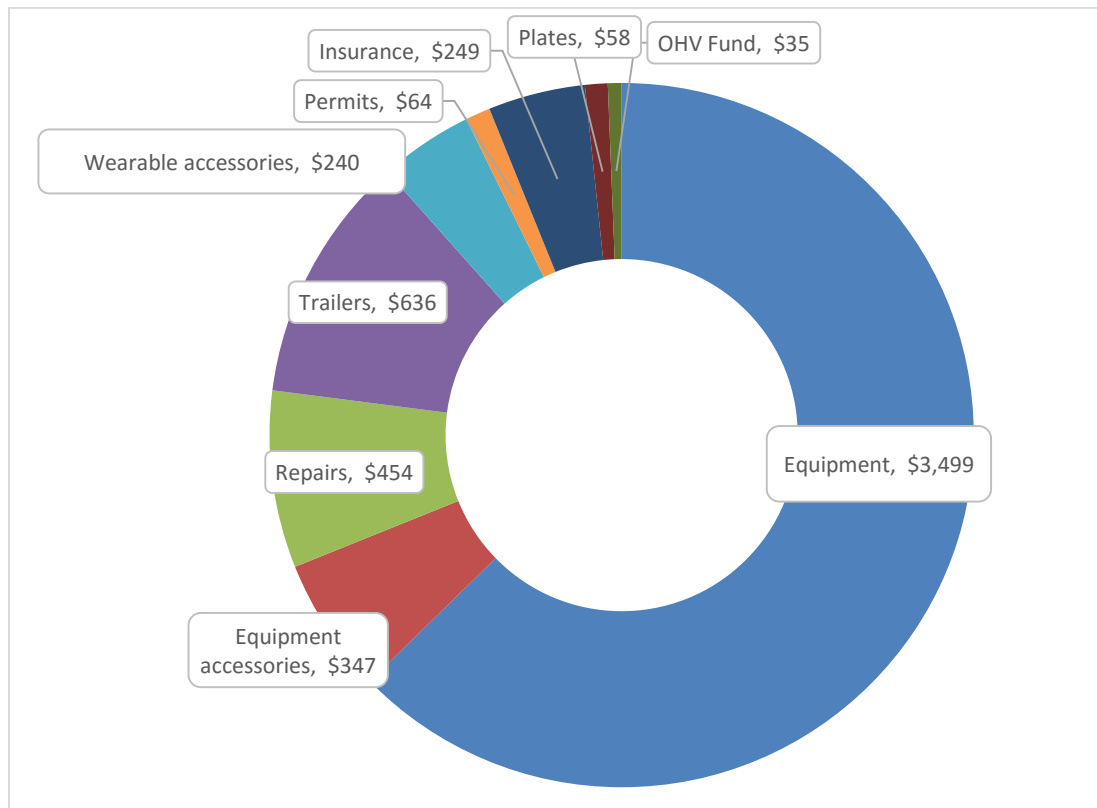


3.3 Equipment, accessories, insurance, and licensing

Apart from the expenses related directly to specific outings, OHV riders periodically spend in other ways that allow them to maintain their hobby or to add to the enjoyment and safety.

In the past 12-months, OHV riders have, on average, spent **\$5,581¹** in Nova Scotia on expenses not related directly to outings.

Figure 8 - 12-month spending on non-outing expenses



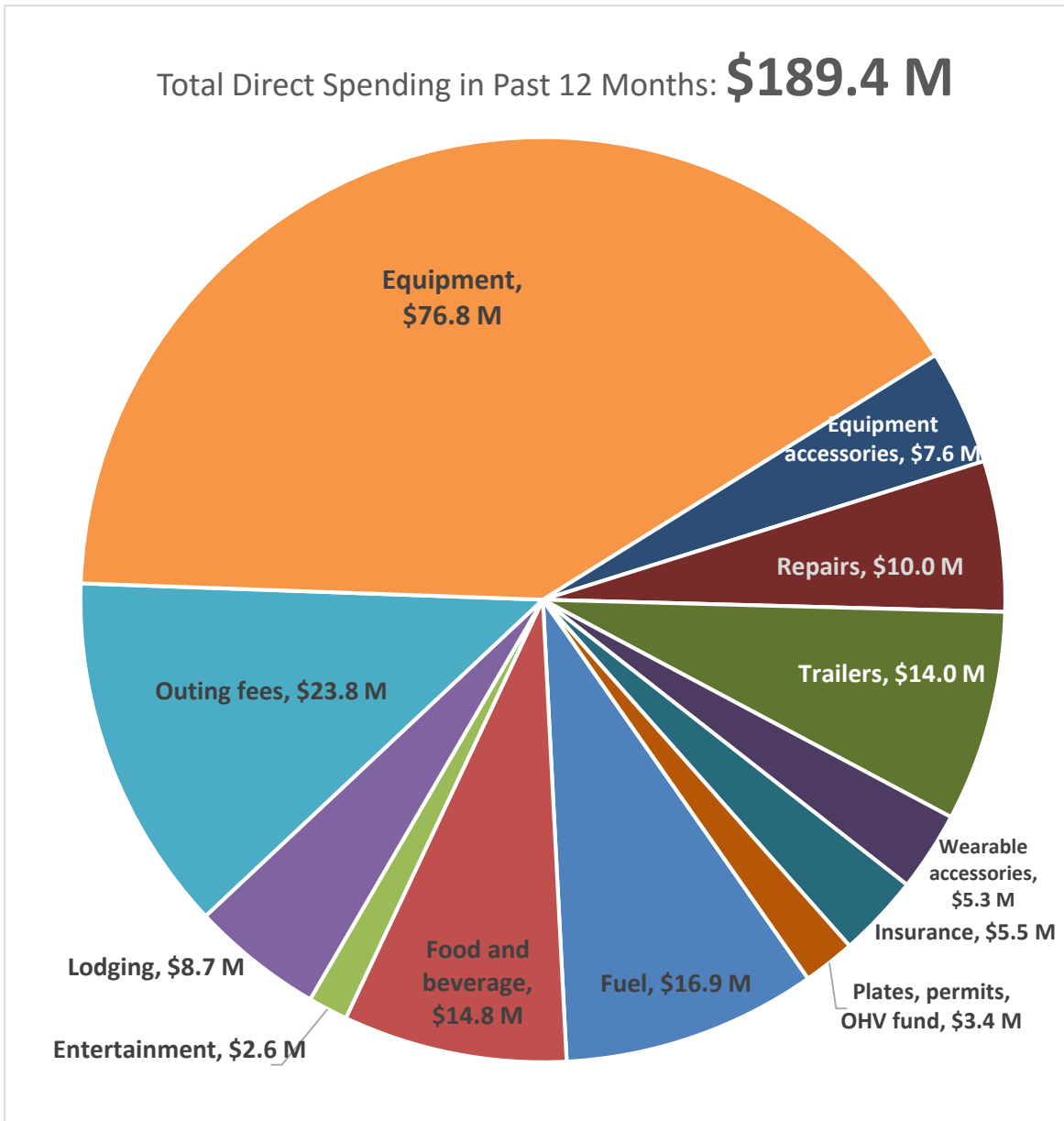
Outside Nova Scotia, these OHV riders have spent \$165 per household and an additional \$102 online. These are not included in the aggregate spending calculations.

¹ Components may not add exactly to total due to rounding.

4.0 AGGREGATE SPENDING

By sampling households that represent the 37,946 registered OHVs in Nova Scotia and collecting spending information for the various categories, we can project the spending within each category and at an aggregate level in the economy.

Figure 9 - Total 12-month spending in Nova Scotia



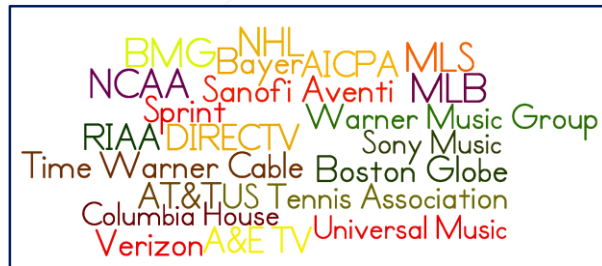
5.0 ABOUT NOVA INSIGHTS

Nova Insights is a full service **market research and evidence-based consulting** firm providing services to organizations across Canada and the United States.

The founder and President of Nova Insights, Paul DesBarres, brings 20 years of experience in the market research industry to clients. Although born and raised in Nova Scotia's Annapolis Valley, he built his experience early in his career in the U.S. for a diverse client list including major universities, associations, international music companies, major newspapers, entertainment companies, and professional and amateur sports organizations. In Canada, he has worked for many municipalities, government departments, social marketing organizations, and associations.

Paul began his career with the Becker Institute of Boston. Becker has a long history as New England's first name in survey research, and provided a vital foundation where Paul specialized in higher education and public policy research.

Paul then spent nearly a decade with The Taylor Research & Consulting Group of Portsmouth, New Hampshire. At Taylor, Paul specialized in consumer research in the sports, media, and entertainment industries. It was during this time that Paul received **specialized training as a qualitative moderator** from the RIVA Institute in Bethesda, Maryland. While at Taylor, Paul managed research and provided analytic and methodological services to clients such as:



In 2005, Paul returned to Canada. From here he has conducted research for:



Nova Insights Market Research & Consulting is a currently approved for the standing offer lists for Communications Nova Scotia, Nova Scotia Business Inc., and Nova Scotia Management Consulting Services.

6.0 METHODOLOGY

6.1 Survey design

The questionnaire was designed by Nova Insights with input and in consultation with the Snowmobile Association of Nova Scotia (SANS), Nova Scotia Off-Road Riders Association (NSORRA), and the All-Terrain Vehicle Association of Nova Scotia (ATVANS).

6.2 Sample Design and Selection

Each OHV organization separately contacted members of their communities through email, social media, and newsletters to encourage participation in the survey.

Once in the survey, each respondent could answer questions based on any or all OHV types members of the households have ridden off property in the past 12 months.

Online and inbound telephone options for completing the interview were provided.

6.3 Survey Administration

The survey was programmed and hosted by Nova Insights. Data collection took place between June 17 and August 14, 2015. The median interview length was 15 minutes.

6.4 Sampling Error

As with any quantitative study, the data reported in this research are subject to **sampling error**, which can be defined as the likely range of difference between the reported results and the results that would have been obtained had we been able to interview *everyone* in the relevant population. Sampling error decreases as the size of the sample increases and as the percentage giving a particular answer moves toward unanimity. Sampling error is traditionally not calculated for online surveys as it is not considered a probability sample.

7.0 QUESTIONNAIRE

Survey Intro

Thank you for taking this survey to help the Nova Scotia Off Highway Vehicle associations (ATVANS All-Terrain Vehicle Association of Nova Scotia, NSORRA the Nova Scotia Off Road Riders Association and SANS Snowmobile Association of Nova Scotia) plan for the future and measure the impact these sports have on the Provincial economy.

This study asks about your habits and spending in riding **Snowmobiles, All-Terrain Vehicles (ATVs & Side by Sides)**, and **Off-Road Motorcycles (ORMs)**. It should take fewer than 10-minutes to complete.

All responses to this survey will be kept confidential and results will only be reported in aggregate. Your identity will not be associated with any responses you provide. You can view our privacy policy at <http://novainsights.ca/privacy-policy/>

Results of this survey will be made available on the websites of each organization following the analysis of the findings.

Please click the “Next” button below to advance to the survey.

A. Participation

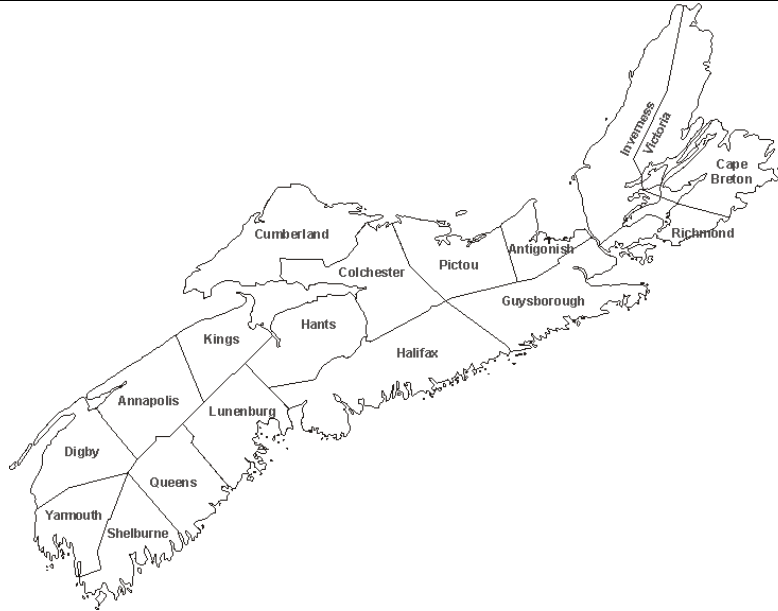
- A1. Please check whether you or anyone in your household has done any of the following in Nova Scotia over the last twelve months?
- ☐ Ridden a Snowmobile off your own property
 - ☐ Ridden an **off-road** motorcycle (ORM) off your own property
 - ☐ Ridden an All-Terrain Vehicle (ATV), including Side by Sides, off your own property
 - ☐ None of the above
- A2. For how many years have people in your household been:
(If different lengths of time for different people, please indicate the longest time for anyone in your household)
[SHOW ONLY FOR ACTIVITIES PARTICIPATED IN]
Snowmobiling _____
Off-Road Motorcycling _____
ATV'ing _____
- A3. How many does your household currently own that have been ridden in the past 12 months?
[SHOW ONLY FOR ACTIVITIES PARTICIPATED IN]
Snowmobiles _____
Off-road motorcycles _____
ATVs _____
- A4a. Including yourself, how many people live in your household (whether or not they ride an OHV)?

Questionnaire

A4b. Please let us know the gender and age of all people living in your household (including yourself), and for each, please indicate whether they have ridden off your property over the past 12 months.

Person 1	<input type="radio"/> Male <input type="radio"/> Female	Age _____	Off property <input type="checkbox"/> Ride snowmobile <input type="checkbox"/> Ride off-road motorcycle <input type="checkbox"/> Ride ATV
Person 2	<input type="radio"/> Male <input type="radio"/> Female	Age _____	Off property <input type="checkbox"/> Ride snowmobile <input type="checkbox"/> Ride off-road motorcycle <input type="checkbox"/> Ride ATV
Person 3	<input type="radio"/> Male <input type="radio"/> Female	Age _____	Off property <input type="checkbox"/> Ride snowmobile <input type="checkbox"/> Ride off-road motorcycle <input type="checkbox"/> Ride ATV
Person 4	<input type="radio"/> Male <input type="radio"/> Female	Age _____	Off property <input type="checkbox"/> Ride snowmobile <input type="checkbox"/> Ride off-road motorcycle <input type="checkbox"/> Ride ATV
Person 5	<input type="radio"/> Male <input type="radio"/> Female	Age _____	Off property <input type="checkbox"/> Ride snowmobile <input type="checkbox"/> Ride off-road motorcycle <input type="checkbox"/> Ride ATV
Person 6	<input type="radio"/> Male <input type="radio"/> Female	Age _____	Off property <input type="checkbox"/> Ride snowmobile <input type="checkbox"/> Ride off-road motorcycle <input type="checkbox"/> Ride ATV
Person 7	<input type="radio"/> Male <input type="radio"/> Female	Age _____	Off property <input type="checkbox"/> Ride snowmobile <input type="checkbox"/> Ride off-road motorcycle <input type="checkbox"/> Ride ATV
Person 8	<input type="radio"/> Male <input type="radio"/> Female	Age _____	Off property <input type="checkbox"/> Ride snowmobile <input type="checkbox"/> Ride off-road motorcycle <input type="checkbox"/> Ride ATV

Questionnaire



- A5. Please indicate all the counties of Nova Scotia anyone from your household has ridden in the past 12 months?

	Snowmobile	Off-road motorcycle	ATV
Annapolis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Antigonish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cape Breton	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Colchester	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cumberland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digby	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guysborough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Halifax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inverness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lunenburg	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pictou	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Queens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Richmond	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shelburne	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Victoria	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Yarmouth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Questionnaire

A6. Which of the following counties is the **PRIMARY** area people in your household have ridden in the past 12 months within Nova Scotia?

	Snowmobile	Off-road motorcycle	ATV
Annapolis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Antigonish	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cape Breton	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Colchester	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cumberland	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Digby	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Guysborough	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Halifax	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inverness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lunenburg	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pictou	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Queens	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Richmond	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shelburne	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Victoria	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Yarmouth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

B. Regular Outings

We're now going to ask about the outings you have when you ride. We'll ask about these outings in two ways—First, we'll ask about your **regular** outings during the past 12 months. Then we'll ask about any special trips in Nova Scotia you may have made, separate from your regular outings.

If you've only had a couple of outings, please include them as your regular outings.

Let's start with your **REGULAR** outings...

- B1. For your regular outings, how many kilometers, one-way, did you travel from your home to reach the location where you would most often ride?
(If you rode your OHV directly from your home, just input 0.)
(just in case – 1 mile=1.6km)

	Snowmobile	Off-road motorcycle	ATV
One-Way KM to Regular Ride Location	_____	_____	_____

- B2. How many nights did you spend away from home on any one of these regular outings in Nova Scotia?
(If you don't spend any nights away from home, just input 0.)

	Snowmobile	Off-road motorcycle	ATV
Nights away	_____	_____	_____

- B3. On your regular OHV outing or trip in Nova Scotia, what was:

	Snowmobile	Off-road motorcycle	ATV
Number of PASSENGER VEHICLES in your group, if you trailered from home	_____	_____	_____
Number of OHVs in your group	_____	_____	_____
Number of PEOPLE in your group	_____	_____	_____

Questionnaire

B4a. For these regular trips, we want to understand all your expenditures. So please think about one regular outing, and provide your best estimate for expenditures related to that outing in each of the categories below. Please keep in mind that any purchases made in your home community for the outing, such as groceries, counts towards this spending.

Please include the spending for **everyone in your household** who would usually take part in the regular outing from the time you left home until you returned.

	Snowmobile	Off-road motorcycle	ATV
Fuel	\$ _____	\$ _____	\$ _____
Food and beverages	\$ _____	\$ _____	\$ _____
Entertainment	\$ _____	\$ _____	\$ _____
Lodging (hotels, motels, B&Bs)	\$ _____	\$ _____	\$ _____
Fees (entries, permits, registrations, etc.)	\$ _____	\$ _____	\$ _____

B4b. If there is any spending not covered above, please describe it and enter the amounts below.

	Snowmobile	Off-road motorcycle	ATV
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____

B5. How many people did this spending include?

	Snowmobile	Off-road motorcycle	ATV
Number of People	_____	_____	_____

B6. How many of these regular outings have you had in the past 12 months?

	Snowmobile	Off-road motorcycle	ATV
Regular Outings	_____	_____	_____

C. Special Outings

Now we're going to ask about the special outings **in Nova Scotia** – the ones when you ride that don't fall into your "regular" outings.

- C6. First, how many special outings in Nova Scotia have you had in the past 12 months that you would not include as "regular"?
If none, just enter 0.

	Snowmobile	Off-road motorcycle	ATV
Number of special outings in NS	_____	_____	_____

Thanks.

We're now going to ask you about your expenditures for **everyone in your household** for those outings in Nova Scotia.

- C1. For your special outings, how many kilometers, one-way, did you travel from your home to reach the location?
(If you rode your OHV directly from your home, just input 0.)
(just in case – 1 mile=1.6km)

	Snowmobile	Off-road motorcycle	ATV
One-Way KM to Outing 1	_____	_____	_____
TO	_____	_____	_____
One-Way KM to Outing 10	_____	_____	_____

Questionnaire

- C2. How many nights did you spend away from home on each of these special outings in Nova Scotia?

	Snowmobile	Off-road motorcycle	ATV
Nights Away to Outing 1	_____	_____	_____
TO	_____	_____	_____
Nights Away to Outing 6	_____	_____	_____

- C3. On your special OHV outings or trips in Nova Scotia, what were:

Special Outing 1	Snowmobile	Off-road motorcycle	ATV
Number of PASSENGER VEHICLES in your group, if you trailered from home	_____	_____	_____
Number of OHVs in your group	_____	_____	_____
Number of PEOPLE in your group	_____	_____	_____

Replicate for up to 10 special outings

Questionnaire

- C4. Now for each of these special outings, we want to understand all your expenditures. So please think about each outing, and provide your best estimate for expenditures related to that outing in each of the categories below. Please keep in mind that any purchases made in your home community for the outing, such as groceries, counts towards this spending.
Please include the spending for **everyone in your household** who took part in the outing from the time you left home until you returned.

Outing 1	Snowmobile	Off-road motorcycle	ATV
Fuel	\$ _____	\$ _____	\$ _____
Food and beverages	\$ _____	\$ _____	\$ _____
Entertainment	\$ _____	\$ _____	\$ _____
Lodging (hotels, motels, B&Bs)	\$ _____	\$ _____	\$ _____
Fees (entries, permits, registrations, etc.)	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____

Replicate for up to 10 special outings

- C5. How many people are included in the spending for these special outings?

Number of People	Snowmobile	Off-road motorcycle	ATV
Outing 1	_____	_____	_____
Outing 2	_____	_____	_____
Outing 3	_____	_____	_____
Outing 4	_____	_____	_____
Outing 5	_____	_____	_____
Outing 6	_____	_____	_____
Outing 7	_____	_____	_____
Outing 8	_____	_____	_____
Outing 9	_____	_____	_____
Outing 10	_____	_____	_____

D. Non-Outing Spending

Now we're going to ask about general spending for your OHV hobby that is not related to specific trips.

D1. Approximately how much has your household spent **in Nova Scotia** over the past 12 months to purchase:

- (a) Equipment (including OHVs, but excluding clothing, helmets and other safety equipment) \$ _____
- (b) Repairs \$ _____
- (c) OHV trailers \$ _____
- (d) Accessory equipment (not including clothing, helmets and other safety equipment you wear) \$ _____
- (e) Wearable accessories, such as clothing, helmets and other safety equipment \$ _____
- (f) Trail permits \$ _____
- (g) Insurance for your OHV \$ _____
- (h) Plates for your OHV \$ _____
- (i) OHV Fund \$ _____

D2. How much additional money was spent **outside of Nova Scotia** for the purchase of any of these items? Please do NOT include purchases made online.

D3. How much additional money was spent **ONLINE** for the purchase of any of these items? _____

E. Background

This information will remain anonymous, and will be used for analytical purposes only.

E1. What is your age? _____

E2. What is your gender?

- 1 Male
- 2 Female

E3. What is your highest level of formal education?

- 1 Less than high school
- 2 Completed high school
- 3 Some university or technical school
- 4 Completed technical diploma degree, or certificate
- 5 Completed university degree (undergraduate, graduate or PhD)
- 6 Prefer not to answer

E4. What was your 2014 household income before taxes and deductions?

- 1 Less than \$30,000
- 2 \$30,000 to \$49,999
- 3 \$50,000 to \$74,999
- 4 \$75,000 to 99,999
- 5 \$100,000 to \$119,999
- 6 \$120,000 or more
- 7 Prefer not to answer

If you would like to participate in any follow-up surveys related to OHV riding, or would like to be notified when the results of this research are available, please provide an e-mail address; **this is optional** and the information will not be used for any other purpose.

E-mail: _____ @ _____

Thank you very much for your participation and feedback!

Please click SUBMIT below.