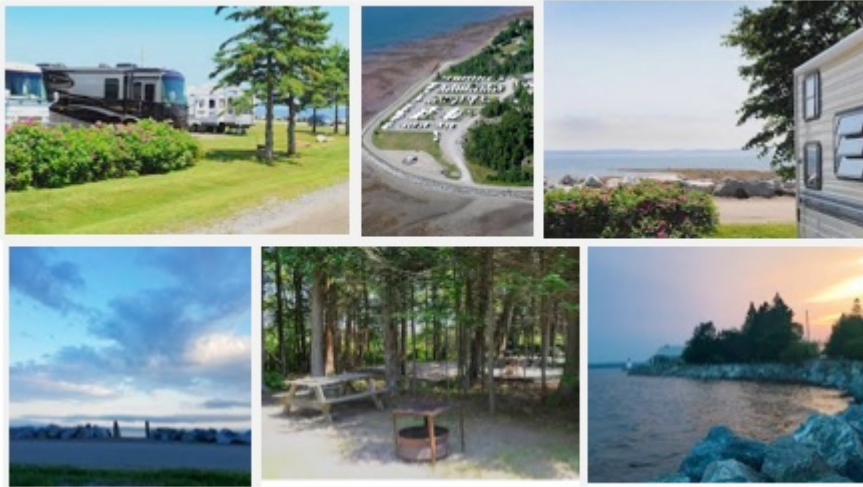
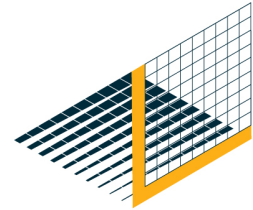


# Economic Impact Study – Oceanfront Camping in St. Andrews, New Brunswick



Prepared for:  
**Kiwanis Club of St. Andrews**



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The Kiwanis Club of St. Andrews acknowledges, with appreciation, the assistance of the St. Andrews Chamber of Commerce and the Charlotte Coastal Region Tourism Association in conducting this study.

# **EXECUTIVE SUMMARY**

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## **Introduction**

Since 1947, the Kiwanis Club of St. Andrews (N.B.) has developed and operated an internationally recognized seasonal campground, Kiwanis Oceanfront Camping, at the tip of the St. Andrews peninsula to fund a wide range of social and community projects. Oceanfront Camping is believed to be the second largest tourist accommodation in Charlotte County, New Brunswick, after the Algonquin Hotel. The campground has 185 serviced trailer and 24 un-serviced tent sites, as well as onsite washrooms, laundry facilities, an activities centre, and propane filling station. This report delivers an economic impact assessment that measures its contributions to the St. Andrews economy, and profiles the campground clientele to support future planning.

## **Camper Profile**

- ❑ Surveys were completed by 168 of the 4,189 Oceanfront camper parties in the summer of 2018, with representation across five types of campers (overnight, weekend, vacation, caravan/rally, and seasonal).
- ❑ The largest group were overnights (60%) staying 1-6 nights, and the second largest group were weekenders (26%).
- ❑ About 56% of Oceanfront campers were from outside the province, and 23% were from the United States.
- ❑ There are strong signs of repeat business, with 81% of weekenders, 84% of vacationers, and 100% of seasonals reporting a return stay.
- ❑ All campers accounted for a total of 20,180 booking nights, and an average of 2.3 people per booking yielding 46,150 person-nights spent in St. Andrews.
- ❑ A further 4,660 people visited Oceanfront campers, but their spending is not included in this report.

## **Camper Activities**

- ❑ Weekend and overnight campers are more apt to enjoy local activities “once” due to their short stay, while vacationers and seasonal campers have more time to enjoy local activities “a few times” or “regularly”.
- ❑ St. Andrews gains at least 52,881 participants in town activities from Oceanfront campers. This is based solely on having the 4,189 camper parties take part in a local activity once, which is often not the case, and doesn’t include the participation of the people who visited these campers. Detailed results for a wide range of activities are contained in the report.
- ❑ Oceanfront campers also added at least 17,329 participants to activities and attractions elsewhere in the Charlotte County region.

## **Camper Spending**

- ❑ Seasonal campers spent the most in St. Andrews (\$5,865 per five-month season) owing to their long stay, and then caravan/rally campers (\$302 per 2-3 day stay).
- ❑ The highest daily spending per person was by caravan and rally campers (\$80), followed by weekenders (\$61).

- ❑ Oceanfront campers spent \$2.2 million in St. Andrews in 2018 (\$1.57 million at local businesses and \$575,950 in campsite fees) that would have been lost to the local economy if not for the campground. This is conservative since it excludes spending by camper visitors and additional spending outside St. Andrews.

### **Economic Impacts**

- ❑ The \$2.2 million spent by Oceanfront campers in St. Andrews leads to an additional \$1.2 million in spinoff spending for a total of \$3.4 million in New Brunswick.
- ❑ Approximately 37 full-time employees in St. Andrews earn \$893,000 from this influx from the campground.
- ❑ The New Brunswick government and the Federal government gain \$194,000 and \$218,000 in tax revenues respectively from camper spending.

### **Business Perspectives**

- ❑ The seven businesses interviewed represented a cross-section of the town's tourism-supported establishments. Those interviewed have a combined total of 124 full-time and part-time staff on their payroll at peak periods during the tourism season.
- ❑ When asked what impact a loss in Oceanfront Camping clients would have on their business, operators used terms like “devastating” and “community disaster” to describe the outcome.
- ❑ Business owners observed that campers have different needs and interests than other travelers and they help to diversify the local economy.
- ❑ Campers also help to alleviate peak season congestion in downtown parking since they can reach points of interest without using their personal vehicle and may time their activities to avoid rush hours. The idea of a shuttle was raised to reduce parking issues.
- ❑ One business observed a recent rise in RV sales and a national report supports this observation by showing a 24% average annual increase over the last three years (2014 – 2017). The business owner suggested that St. Andrews should work to attract this growing market and capture as many as possible from it.
- ❑ Nearly all businesses encouraged Oceanfront Camping and the Kiwanis Club to raise awareness about the campground's contribution to the St. Andrews economy and better coordinate and build its local tourism opportunities.

### **Opportunities to Increase Benefits**

Kiwanis and Oceanfront Camping representatives provided additional insights including camper suggestions and campsite initiatives that could lead to additional economic impacts in St. Andrews.

- ❑ Improving transportation access by extending the Water Street sidewalk, and by establishing an around town shuttle system serving not only campers, but area residents and other tourists as well.
- ❑ Improving activity participation by expanding tourist information services at the campground, including an events board like the existing Kiwanis board in town, and by developing a coupon book for all local area tourists.

# I THE PROJECT

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## 1. Background

Since 1947, the Kiwanis Club of St. Andrews (N.B.) has developed and operated a seasonal campground, Kiwanis Oceanfront Camping, at the tip of the St. Andrews peninsula to fund a wide range of social and community projects. These funds have supported youth sports and arts programs, built ball fields and trails, helped to address seniors needs, provided school scholarships and underwritten many more activities that otherwise would not be feasible in a community of less than 1,900 residents.

The Kiwanis campground's benefits extend beyond its social contributions to include a significant role in the local economy. This study seeks to measure this economic impact and identify opportunities to expand upon it in future regional tourism planning and marketing initiatives.

Oceanfront Camping is believed to be the second largest tourist accommodation in Charlotte County, New Brunswick, after the Algonquin Hotel.

The campground is an internationally-recognized accommodation that operates five months of the year (early May to early October). It currently has 185 serviced trailer and 24 un-serviced tent sites, as well as onsite washrooms, laundry facilities, an activities centre, dump station, propane filling station and more (see <http://www.kiwanisoceanfrontcamping.com> for a full description).

It meets the need of a rapidly-growing niche market for tourists who travel exclusively by recreational vehicle and only stay where appropriate facilities are available for them.

Oceanfront Camping clientele fall into five general categories:

1. **Overnight** - Campers who stay 1-6 nights while passing through the area;
2. **Weekend** - Campers from within the region who come to St. Andrews as a destination of choice for a weekend get-away;
3. **Vacation** - Campers who spend their summer holiday (one or more weeks) at the campground.
4. **Caravan/Rally** - Campers in groups organized by RV caravan tour operators that use St. Andrews as a preferred international stop or by RV rally organizers that use it as their sole destination;
5. **Seasonal** - Campers who use the campground as a full or part time residence for the entire season;

These campers contribute directly and indirectly to a wide range of economic sectors, in some cases making a vital difference to local business success. The most influenced sectors are understood to be food and beverage, grocery, gas and repair services, tourist

retail, day adventures, and local attractions and events. The campground also contributes to government revenues through its sales, property taxes and utility payments.

## **2. Goal and objectives**

The overall goal is to deliver an economic impact assessment of Oceanfront Camping that identifies and measures its contributions to the area economy and offers recommendations on how to maximize these in the future. In particular, the following items are reflected in this report:

- ❑ A campground user survey to quantify interests and spending by camper type;
- ❑ A survey of area businesses to determine linkages and perceived impacts of Oceanfront Camping clients;
- ❑ Apply standard economic analysis tools to the survey data to give reliable impact assessment statistics; and
- ❑ Identify opportunities to increase campground economic benefits.

## **II METHODOLOGY**

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### **1. Survey design and analysis**

The survey questions are contained in Appendix A and this was randomly distributed to campers until a target of thirty (30) was completed by each type of camper. Seasonal campers that participated in the survey completed questions at the end of each month.

The survey questions are based on topics of interest to Oceanfront Camping and of relevance to their clientele. Questions used to profile campers (e.g. origin, age, length of stay) and questions regarding camper spending were developed based on Statistics Canada and provincial government tourism surveys.

The aim of the survey is to collect information from a sample of campers in order to represent the total camper population for the 2018 year. In total 168 completed surveys were collected from the 4,189 camper bookings this year.

The survey data were transferred from paper to electronic form by entering the responses in an Excel spreadsheet. All analysis was completed in the spreadsheet except for the economic impact analysis that is described further below.

### **2. Business interviews**

Interviews were conducted with seven local business operators to gain insights regarding their linkages with Oceanfront Camping clientele. The interviews are not meant to be broadly representative of the business community, and are more a way to highlight key points and ensure that important economic impacts are not overlooked even if they are difficult to quantify. Each interview lasted twenty to thirty minutes and involved asking the operator to briefly:

- describe the business including summer activity and staffing;
- estimate the level of business from Oceanfront Camping clients;
- describe the impact to their business if Oceanfront Camping suffered a major setback; and
- indicate any other issues or impacts related to Oceanfront Camping.

A summary of all discussions and key points is presented in this report without attribution to any specific business.

### 3. *Economic analysis*

The spending statistics from surveys, along with the campground revenues that are re-invested in the community were used as inputs to the formal economic impact analysis, using accepted Statistics Canada methodology. This gave measures of the campground's impact on local GDP (the added value that stays within the area), worker income and level of employment.

Statistics Canada maintains interprovincial economic input-output models that may be run for custom analysis. Gardner Pinfold has used this on many occasions for tourism and recreation projects in New Brunswick and Atlantic Canada. Campground visitor spending and community investment involves a mix of: non-residential construction, repair construction, accommodation, food and beverage, retail, transportation, and other industries and commodities. The campground-related expenditures must be split into categories that align with North American Industry Classification (NAICS) codes in order to complete the input-output analysis.

The economic input-output analysis calculates how the initial spending (output) flows through the economy triggering demand for a myriad of goods and services. Following conventional practice, the economic impact is measured with three indicators:

- **GDP:** an industry's contribution to Gross Domestic Product represents its broadest measure of economic impact. The domestic product of an industry captures the value it adds to purchased inputs through the application of labour and capital. GDP represents the sum of the value added by each industry. GDP is typically lower than the gross output (spending) since many goods and services are brought in from other parts of the country and abroad. GDP represents the value that stays in within each province or region.
- **Income:** this captures payments in the form of wages and salaries earned in the affected industries. Returns to labour in the form of wages, salaries and earnings form a key component of GDP. Industries paying relatively high average wages and salaries generate a correspondingly higher economic impact than industries paying lower average incomes.
- **Employment:** industry employment is important politically because of the significance generally attached to jobs, but from an economic impact perspective, the significance lies in the economic impact generated through the spending of employment income. The greater the employment and higher the average income, the more significant the industry in terms of economic impact. Employment is measured in full-time equivalents (FTE).



Economic impacts are generated through direct, indirect and induced demand in the economy expressed in terms of industry and consumer purchases of goods and services.

- **Direct impact:** refers to impact arising from the expenditures made by firms in the subject industries on the goods and services needed to produce industry outputs. For example, tourism operators purchase vehicles from manufacturers or restaurants purchase food from wholesalers or directly from agriculture producers.
- **Indirect impact:** refers to the inter-industry purchases triggered by the direct demand. For example, agriculture buys farm inputs from manufacturers; refineries buy services from maintenance contractors. These industries in turn buy more basic goods and services, and so on.
- **Induced demand:** refers to the demand created in the broader economy through consumer spending of incomes earned by those employed in direct and indirect activities. It may take a year or more for these rounds of consumer spending to work their way through an economy.

### III FINDINGS

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#### 1. Introduction

Surveys were completed by five types of visitors to Oceanfront Camping with the number and percentage of bookings shown along with the number of surveys completed:

- Overnight stays (2,511, 60%) – 1-6 night stay (46 surveys)
- Weekend stays (1,070, 26%) – 2-4 night local weekend getaway (32 surveys)
- Vacation stays (41, 1%) – a multi-week stay, mostly 1-2 weeks (32 surveys)
- Caravan/Rally (494, 12%) – a 2-3 night stay with an organized caravan tour or RV rally (28 surveys)
- Seasonal stays (72, 2%) – sites booked for the entire 5-month season (30 surveys)

There were a total of 4,189 stays (bookings) in 2018.

#### 2. Camper profile

Most of Oceanfront Camping’s users are from Canada, but Americans make up a significant part of the clientele. Caravan campers are exclusively American. Rally campers are from the U.S. and Canada. Approximately one-fifth of both Overnight and Vacation campers are also from the U.S.

While weekend and seasonal campers are almost all from New Brunswick, the majority of campers in all other categories are from outside the province. For example, the campers surveyed came from seven Canadian provinces, 18 American states and one European country. Other than New Brunswickers, the greatest number of Canadian campers were from Ontario and Quebec and the greatest number of Americans were from Florida, Pennsylvania and Maine. This is the first indication that a substantial amount of spending could be from outside the province.

*Table 1. Camper origins*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
New Brunswick	28%	97%	47%	0%	87%
Other Atlantic Canada	7%	0%	6%	0%	7%
Central-Western Canada	43%	0%	25%	14%	3%
USA	20%	3%	22%	86%	3%
Europe	2%	0%	0%	0%	0%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

The majority of weekend, vacation and seasonal campers said that they have always known about Oceanfront Camping or had learned of it from family and friends. Overnight campers tended to learn about Oceanfront through the website (54%) and caravan/rally campers primarily through tour operators (75%) or rally information (25%).

*Table 2. Camper source of information on Oceanfront Camping*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
Always known	11%	47%	41%	0%	50%
Social media	0%	3%	3%	4%	0%
Tour operator	0%	3%	0%	75%	0%
Family/friends	28%	50%	31%	4%	33%
Travel guide	7%	0%	0%	0%	3%
By chance	4%	0%	9%	0%	7%
Website	54%	9%	13%	0%	17%
Other	9%	0%	6%	25%	0%

*Note: Columns sum to more than 100% since respondents could select more than one item.*

The survey showed strong signs of repeat business, with 81% of weekenders, 84% of vacationers, and 100% of seasonals being on a return visit. Many of these said that they return regularly, often coming back over many years and in some cases decades. Overnight and caravan campers represented the largest proportion of new business, with the prospect that some will return at a later date.

*Table 3. Campers staying at Oceanfront Camping for the first time*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
Yes	67%	19%	16%	83%	0%
No	33%	81%	84%	18%	100%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

The oceanfront setting is the primary reason for all types of campers to visit, except for caravan and rally campers whose destination is part of their package (noted as Other). St. Andrews as a destination is the second main reason overall, and for some it is the top reason (e.g. tied for first among weekenders). Not included in the survey choices, but noted repeatedly as a comment to the open-ended question, was the short walking distance (10 minutes) between the campground and the downtown shopping district.

*Table 4. Main reasons for staying at Oceanfront Camping*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
St Andrews destination	67%	84%	81%	39%	77%
Facilities	28%	25%	31%	11%	57%
An event	15%	13%	3%	36%	10%
Oceanfront setting	80%	84%	94%	29%	93%
Price	15%	13%	6%	4%	37%
Convenient stop on trip	22%	0%	3%	14%	0%
Other	13%	13%	22%	61%	37%

*Note: Columns sum to more than 100% since respondents could select more than one item.*

Overnight campers that were surveyed stayed an average of 2.3 nights at Oceanfront Camping while travelling on an average 17-night trip. Caravaners stayed 2-3 nights as

part of an average 54-night trip. Weekend, vacation and seasonal campers tended to come directly to St. Andrews and return home.

The total number of night-stays in 2018 was 9,382 (number of bookings times the average number of nights per booking) and the total person-nights was 24,189 (nights-stays times the average number of people per booking). In addition, the seasonal sites are occupied for five (5) months suggesting about 10,800 night-stays, and 21,960 person-nights. The combined total for all camper types was about 20,180 night-stays and 46,150 person-nights (with an overall average of 2.3 people per booking).

*Table 5. Camper trip duration (days)*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
Total return trip	17	3	28	54	na
NB part of trip	7	3	24	8	na
Oceanfront nights	2.3	1.7	12.9	2.0	na

*Note: na = not applicable, as seasonals book for the entire season.*

Although the average number of people in a camping party is fairly similar across all camper categories (2.3), caravan campers were at the low end of the range with an average 1.9 people per campsite and overnight campers were at the high end with an average of 2.8 people per campsite. Overnight and weekend campers tended to be at the lower end of the age range and more likely to have party members under age 19. Caravan campers were all over 50 years old and seasonal campers were the next highest in age.

*Table 6. Number of campers per site, by age group*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
Avg no. campers	2.8	2.5	2.3	1.9	2.0
Under 19	20%	13%	17%	0%	8%
19-34	5%	14%	0%	0%	7%
35-49	17%	24%	11%	0%	10%
50-69	43%	44%	45%	59%	44%
Over 69	16%	6%	27%	41%	31%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Seasonals have a high number of visitors over the summer (14.4 on average) since this is a summer residence for many. Their visitors were distributed evenly across the age ranges. It is important to note that spending by these visitors is not captured in the survey, only the spending by the campers themselves. When these are multiplied by the number of bookings for each type of camper, an estimate of 4,660 visitors is produced.

*Table 7. Number of people visiting campers, by age group*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
Avg no. visitors	1.0	1.0	1.0	na	14.4
Under 19	33%	16%	26%	na	17%
19-34	13%	40%	7%	na	13%
35-49	24%	12%	28%	na	16%
50-69	28%	24%	28%	na	37%
Over 69	2%	8%	11%	na	18%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>na</b>	<b>100%</b>

*na = not applicable*

Not surprisingly there was an August peak of visitors to seasonal campsites and some of this activity extended into early September. There is no clear pattern to the age of visitors throughout the season.

*Table 8. Seasonal camper visitors, by month and by age group*

	June	July	August	September	October	Total
Avg no. visitors	2.4	2.1	6.9	3.9	1.7	17.1
Under 19	11%	11%	19%	17%	21%	20%
19-34	13%	0%	21%	10%	0%	14%
35-49	15%	15%	15%	16%	23%	14%
50-69	40%	21%	34%	44%	42%	37%
Over 69	21%	53%	11%	12%	14%	16%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

### 3. Camper activities

The following findings reflect camper participation in activities in St. Andrews. Survey participants were asked to identify all of their activities and whether these were enjoyed “once”, “a few times”, or “regularly”.

Weekend and overnight campers are more apt to enjoy activities “once”, while vacationers and seasonals have more time to enjoy activities a few times or regularly. The responses in each table are ordered from lowest to highest participation for overnight campers (the largest group).

*Table 9. Campers participating in St. Andrews activities “once”*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
History, culture, arts	43%	16%	6%	29%	7%
Buy gas and supplies	43%	41%	19%	21%	0%
Shop for yourself and gifts	39%	41%	13%	29%	0%
Eat out	35%	47%	6%	32%	0%
Buy groceries	33%	50%	0%	43%	0%
Relax	28%	19%	6%	11%	0%
Adventure, recreation	28%	25%	13%	21%	0%
Walk trail/beach/streets	24%	19%	0%	25%	0%
Nature-based	24%	25%	9%	32%	0%
Attend events/performances	22%	13%	19%	11%	0%
Bicycle	11%	6%	0%	11%	3%
Visit family and friends	7%	13%	0%	7%	0%
Learning activity or course	0%	3%	3%	18%	7%

Note: Columns sum to more than 100% because campers could select multiple activities.

*Table 10. Campers participating in St. Andrews activities “a few times”*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
Walk trail/beach/streets	43%	38%	28%	61%	13%
Eat out	41%	25%	72%	50%	63%
Buy groceries	37%	19%	47%	14%	20%
Shop for yourself and gifts	37%	22%	53%	39%	80%
Buy gas and supplies	26%	28%	47%	11%	50%
Relax	24%	19%	9%	14%	3%
Nature-based	24%	16%	56%	32%	47%
History, culture, arts	22%	16%	53%	50%	67%
Adventure, recreation	15%	9%	25%	18%	43%
Bicycle	13%	9%	13%	4%	23%
Visit family and friends	7%	6%	19%	0%	47%
Attend events/performances	4%	13%	19%	11%	70%
Learning activity or course	2%	3%	6%	7%	30%

Note: Columns sum to more than 100% because campers could select multiple activities.

*Table 11. Campers participating in St. Andrews activities “regularly”*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
Relax	43%	59%	84%	46%	93%
Walk trail/beach/streets	17%	28%	69%	7%	83%
Buy groceries	9%	3%	47%	4%	77%
Shop for you / gifts	9%	9%	19%	4%	17%
Nature-based	7%	16%	13%	7%	50%
Bicycle	7%	19%	44%	4%	40%
Visit family & friends	4%	6%	9%	4%	27%
Buy gas and supplies	4%	3%	31%	4%	40%
History, culture, arts	4%	13%	9%	11%	17%
Adventure, recreation	4%	16%	31%	7%	40%
Attend events/performances	4%	0%	9%	0%	23%
Eat out	2%	3%	16%	11%	33%
Learning or course	2%	6%	0%	7%	7%

*Note: Columns sum to more than 100% because campers could select multiple activities.*

The following table summarizes detailed results in the Appendix showing participation rates (% participation) in different activities, and estimates of the estimated number of participants for each activity by type of camper.

The number of participants (below) is based on the percentage of campers that indicated they participated in each activity (table above) multiplied by the number of bookings by camper type, multiplied by the average number of campers (e.g. 39% of the 2,740 overnight bookings with an average 2.8 campers went to the farmers market, resulting in 2,713 participants). This is a minimum estimate since this is only counting participants “once”, when in fact many activities were enjoyed “a few times” or “regularly”.

Considering all 4,189 camper bookings and the range of activities they participate in during their stay, the combined total is at least 70,200 activity-participants from Oceanfront Camping clientele.

*Table 12. Number of activity participants generated by Oceanfront Camping*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal	Total
St. Andrews	34,216	9,617	865	6,567	1,615	52,881
St. Stephen	5,125	836	202	1,055	425	7,643
St. George/Black's Hbr	2,110	167	96	68	176	2,618
Fundy Isles	5,426	585	160	272	195	6,639
McAdam	301	84	15	-	29	429
<b>Total</b>	<b>47,178</b>	<b>11,290</b>	<b>1,339</b>	<b>7,963</b>	<b>2,440</b>	<b>70,209</b>

## 4. Camper spending

The last set of findings deals with spending questions in the survey. Participants indicated how much they spent according to categories that are typical of tourism surveys carried out by Statistics Canada and provincial tourism departments. These spending estimates include all taxes and gratuities in Canadian currency.

Spending is shown by category in the table below and only includes spending directly in St. Andrews. Seasonal campers spent the most (average \$5,865 for the season) followed by vacationers (average \$525 per stay).

*Table 13. Average expenditures in St. Andrews, by camper type*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal*
Gas, vehicle repairs	\$59	\$56	\$92	\$43	\$1,163
Groceries and beverages	\$60	\$51	\$146	\$37	\$1,742
Eating out	\$61	\$54	\$136	\$78	\$1,592
Local attractions	\$59	\$46	\$84	\$74	\$488
Other (e.g. shopping)	\$44	\$46	\$68	\$71	\$881
<b>Total</b>	<b>\$283</b>	<b>\$253</b>	<b>\$525</b>	<b>\$302</b>	<b>\$5,865</b>

\*Seasonal spending is based on a 5-month stay.

Note: Currency conversions used were USD = 1.32 CAD, Euro = 1.5 CAD.

It is often valuable to know which individuals have the highest daily expenditures in St. Andrews, and what they tend to spend their money on. Caravan and rally campers lead daily spending (\$80) followed by weekend campers (\$61) and overnights (\$45). The daily expenditure is lowest for longer-term campers.

*Table 14. Spending per person-night by type of camper and spending category*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal*
Gas, vehicle repairs	\$9.49	\$13.38	\$3.03	\$11.40	\$3.81
Groceries and beverages	\$9.59	\$12.26	\$4.81	\$9.72	\$5.71
Eating out	\$9.79	\$12.84	\$4.49	\$20.55	\$5.22
Local attractions	\$9.53	\$11.07	\$2.78	\$19.62	\$1.60
Other (e.g. shopping)	\$7.05	\$11.04	\$2.24	\$18.75	\$2.89
<b>Total</b>	<b>\$45.45</b>	<b>\$60.59</b>	<b>\$17.35</b>	<b>\$80.04</b>	<b>\$19.23</b>

\*Seasonal spending is based on a 5-month stay.

When the spending profiles are applied to the total number of bookings for the 2018 season the following estimates of aggregate spending are produced. The results are divided by type of camper and by origin (NB, other Canada, international).



*Table 15. Direct spending at St. Andrews businesses by camper type and origin*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal	Total
New Brunswick	\$457,288	\$265,789	\$8,278	\$0	\$367,505	\$1,098,860
Other Canada	\$169,490	\$0	\$9,348	\$32,254	\$45,401	\$256,492
International	\$83,142	\$5,095	\$3,989	\$116,947	\$9,360	\$218,533
<b>Total</b>	<b>\$709,920</b>	<b>\$270,884</b>	<b>\$21,615</b>	<b>\$149,202</b>	<b>\$422,266</b>	<b>\$1,573,886</b>

In addition to the above direct local business spending, Oceanfront campers paid \$575,950 in campsite fees in 2018. Oceanfront Camping in turn primarily spends these revenues in St. Andrews to operate the campground and fund ongoing community needs. The campground's records don't identify campsite fees by the camper categories used in this report so these are not included in the above table.

The key findings from the spending table are as follows:

- **Type of camper** – The top expenditures came from overnight campers (45%), followed by seasonals (27%), then weekenders (17%).
- **Origin of camper** – About 70% of spending comes from residents of New Brunswick, 16% from elsewhere in Canada, and 14% from international visitors.
- **Oceanfront spinoff** – Campground site fee revenue was \$575,950 in 2018. This indicates that for every dollar spent in campground fees, another \$2.73 was spent elsewhere in St. Andrews.
- **Direct camper spending only** – These figures do not capture the additional spending by people who are visiting campers at Oceanfront, which can be significant, especially for seasonal campers that have an average of 14.4 visitors per year.

## IV ECONOMIC IMPACTS

The conservatively estimated total camper spending of \$2.2 million in St. Andrews (\$1.57 million at local businesses and \$576,000 in campsite fees) is the starting point for economic impact analysis using Statistics Canada’s model. The model results in the table below show the campground’s “direct” economic impacts in St. Andrews. Indirect and induced impacts occur as the spending works its way through the local, provincial, and national economies over the course of a year. The supply chains for local goods and services extend well beyond St. Andrews to other parts of New Brunswick and to other provinces. Keep in mind that each indicator is separate and not meant to be combined since income is a part of GDP, and GDP is a part of output (spending).

*Table 16. Economic impacts of Oceanfront camper spending (\$000s)*

	Direct*	Indirect	Induced	Total NB	Total Canada
Output	\$2,156	\$672	\$536	\$3,364	\$4,445
GDP	\$1,208	\$361	\$327	\$1,896	\$2,434
Income	\$893	\$190	\$132	\$1,215	\$1,514
Employment**	37	4	4	45	51
Federal tax	\$109	\$30	\$26	\$166	\$218
Provincial tax	\$116	\$52	\$26	\$194	\$270

Sources: Statistics Canada interprovincial input-output model, 2014. Taxes include income tax based on the Statistics Canada Social Policy and Simulation Database, 2017.

\* Direct impacts occur in St. Andrews, indirect and induced impacts are mostly elsewhere.

\*\* Employment is reported in full-time equivalents (FTE).

Several highlights are drawn from the table:

- **Output** – The direct output is the total spending value from the survey. This is the amount of spending captured directly in St. Andrews and, for every dollar spent in St. Andrews, another \$0.56 is captured elsewhere in the province.
- **GDP** – Gross domestic product is the real indicator of value-added to the economy and over \$1.2 million is captured in St. Andrews, while another \$0.57 is added elsewhere in the province.
- **Income** – An estimated \$893,000 worth of income is earned in St. Andrews, while another \$323,000 is earned elsewhere in the province as a result of the campground. Income is the main component of GDP and the proportion here is high primarily because the businesses that capture tourist spending tend to be labour intensive.
- **Employment** – About 37 full-time equivalent (FTE) jobs are supported in St. Andrews by Oceanfront camper expenditures. Another 8 are generated throughout the province for a total of 45.
- **Taxes** – The New Brunswick government and the federal government gain \$194,000 and \$218,000 in tax revenues respectively. Another \$76,000 is captured by provincial governments elsewhere in Canada.

## **VI BUSINESS INTERVIEWS**

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Interviews were carried out with seven (7) business owners in St. Andrews to gain insights regarding their linkages with Oceanfront Camping clientele. Those interviewed represent a cross-section of businesses including: whale watching and tourist attractions, retail, grocery, service station, and food service.

The businesses indicated they have a combined total of 124 full-time and part-time staff on their payroll at peak periods during the summer. Most of these businesses earn their highest revenues in the summer and hire additional staff to serve the demand from tourism. Three of the businesses close for the winter months and are entirely dependent on summer tourism activity for their business success.

Although most businesses are not always able to determine which customers are from Oceanfront Camping, they are often able to recognize repeat customers (e.g. seasonal campers and return vacationers). Some businesses help larger groups of Oceanfront campers to coordinate activities, meals, and supplies, especially for caravan tours and rally groups.

Businesses owners recognize that those staying at the campground make purchases that are different from tourists using other forms of accommodation. Campers staying longer-term may buy more groceries than eat-out, so they tend to benefit convenience stores and grocery stores. They also have greater needs for household items and durables as opposed to consumables, so certain retailers will benefit accordingly. This helps to diversify the town's economy and distribute business activity throughout the season, week, and even throughout the day.

The issue of parking was raised by a number of the downtown business operators. They described how peak summer tourism overwhelms the downtown where there is limited parking in close proximity to key tourist activities (attractions, food service, retail, etc). Although most tourists can manage, some with health issues, young infants, or on a very tight schedule have voiced some frustration. The benefit of Oceanfront Camping, in the view of the business operators, is that campers are more likely to know about parking and congestion and they have greater flexibility. Oceanfront campers often use alternate transport (e.g. bike, walk), and adjust their schedules to go downtown when it is less busy. The businesses appreciate that the proximity of the campground and nature of the clientele can help alleviate parking pressure during the busy summer season.

A partial solution to the parking issue was offered by some businesses. They described the benefits of a shuttle allowing tourists, not only from Oceanfront Camping, to reach attractions and move between points of interest without using their personal vehicles. This could support summer employment and alleviate traffic congestion.

Businesses appreciate promotion and awareness of their business at the campground so that campers know where they can find everything they need in town. A couple of businesses indicated they benefit from purchases made directly by the campground, especially when there are jamborees or events where the campground needs to have food and other supplies on-hand.

When asked what impact a loss in Oceanfront Camping clients would have on their business, the answer was consistent and clear. It would have a severe negative impact and business operators used terms like “devastating” and “community disaster” to describe such a scenario.

Businesses recognize that Oceanfront Camping offers an attractive location in close proximity to St. Andrews merchants and tourist activities. They would not like to see the campground compromised in any way, on the contrary they encourage any efforts to facilitate camper access and interaction with St. Andrews merchants.

One business owner remarked that RV sales have increased in recent years and suggested that St. Andrews should be looking to support the campground and avoid hindering its ability to capture these travelers. This was an interesting insight; the statistics below did not come from the business owner and are provided as follow-up to this observation.

According to a 2018 report by The Portage Group<sup>1</sup>, annual sales of RVs in Canada were relatively steady from 2009 to 2014 at about \$270 million, then rose rapidly to nearly \$470 million in 2017. This three-year rise represents a 73% increase or a remarkable 24% average annual increase in sales. The report also included ownership statistics by region and 14% of Atlantic Canadians “own or have access to” an RV, while this is 17% in Quebec and 13% in Ontario.

Finally, business operators often observed that many people are not conscious of the campground “quietly operating around the corner”, and people likely don’t realize how big an impact it has. It was often suggested that Oceanfront Camping and the Kiwanis Club should do more to raise awareness about their activities and contributions in St. Andrews.

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<sup>1</sup> The Portage Group Inc., and Urbanmetrics Inc. 2018. The Economic Impact of the Recreation Vehicle Industry in Canada.

## **VII OPPORTUNITIES TO INCREASE BENEFITS**

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While Oceanfront Camping already has a significant impact on the St. Andrews economy and on the wider area economy, there are always ways to increase the economic benefits from campers.

There is very limited opportunity to increase the number of campground users by increasing the number of sites without affecting the quality for which Oceanfront Camping is known. Kiwanis and Oceanfront Camping representatives provided additional insights including camper suggestions and campsite initiatives that could lead to additional camper spending in St. Andrews. The following suggestions might provide broader benefits to other tourists and St. Andrews residents as well.

### **Improving transportation access**

Many RV owners now travel in motor homes that are 30-45 feet long and can only be parked in large RV parking spaces, not on community streets. These campers rely on walking or biking in St. Andrews for shopping and activities, and Oceanfront Camping's close proximity to the downtown is a significant factor in their decision to stay here.

- ❑ **Extending the Water Street sidewalk** - Campers, other tourists and residents have access to a sidewalk from the downtown as far as Patrick Street, but must then walk on a narrowing road edge to Indian Point and the campground. Particularly young children, walkers with mobility issues, and parents with strollers, would benefit from a sidewalk extension that eliminates hazards and facilitates non-motorized travel.
- ❑ **Creating an around-town shuttle system** - RV campers that don't have a separate smaller vehicle are limited to participating in local activities that they can reach by foot or bicycle. This option is reduced for older or mobility-limited campers. An around-town shuttle vehicle that stops at major attractions, the downtown, parking areas away from the downtown, perhaps senior's accommodations and the campground could greatly increase local participation rates and expenditures by campers, other tourists, and residents.

### **Improving activity participation**

The following ideas aim to raise awareness about activities and events, and stimulate spending in St. Andrews by offering incentives.

- ❑ **Expanding visitor information services at the campground** - Oceanfront Camping staff do their best to make campers aware of local activities and events, but they work in an extremely busy environment that allows limited time for this.

Campers often do not participate in local activities because they don't know about them. The campground could expand its unstaffed information services through:

- a) a larger, better located events board operated in the same fashion as the current Kiwanis events board in the downtown,
  - b) included on this board, a link to the on-line Events Calendar provided by the Chamber of Commerce, and
  - c) should the campground replace its current small office/store with a more appropriate larger building, this could include a visitor information area with more space for self-serve rack cards, brochures, maps and notices.
- **Coupon book** - Coupon books that offer discounts or other incentives to visit local attractions or participate in local activities have been very successful elsewhere and might be considered for the St. Andrews area. These are most often developed by a local business association and are a larger scale, more coordinated approach to marketing than discounts noted on individual business rack cards. These could target the town's (or area's) entire tourism market, not just the campground component.

## APPENDIX A – SUPPLEMENTARY TABLES

The first table simply indicates the percentage of each camper type that participated in an activity regardless of whether they did so once or many times. All subsequent tables showing “% participation” are derived the same way.

*Table A1. Attractions visited in St. Andrews by camper type (% participation)*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
Tidal beaches	70%	44%	69%	71%	90%
Town wharf	48%	56%	84%	54%	93%
Ministers Island	43%	38%	66%	82%	63%
Farmers Market	39%	9%	88%	18%	97%
Historic architecture	37%	22%	47%	39%	43%
Town parks	37%	31%	56%	21%	70%
Van Horne Trail	33%	25%	72%	21%	90%
St. Andrews Blockhouse	26%	25%	56%	29%	53%
Whale watching	26%	9%	38%	32%	27%
Kingsbrae Garden	22%	28%	44%	57%	83%
Fundy Discovery Aquarium	17%	28%	34%	25%	47%
1800s churches etc.	13%	3%	34%	57%	40%
Pendlebury Lighthouse	11%	3%	31%	11%	37%
Algonquin golf course	11%	9%	9%	0%	7%
Sheriff Andrews House	9%	3%	22%	4%	33%
St Andrews creative playground	9%	9%	22%	0%	43%
Charlotte County Court House	7%	0%	19%	54%	37%
Ross Memorial Museum	7%	0%	28%	0%	30%
Charlotte County Gaol	4%	0%	9%	43%	23%
Sunbury Shores Arts/Nature	4%	6%	19%	4%	17%
Guided beach walk	4%	0%	3%	11%	3%
Sea kayak rentals/tours	4%	0%	9%	0%	0%
Other	4%	0%	3%	0%	0%
Guided heritage tours	2%	0%	19%	46%	17%
Sea fishing	2%	6%	0%	0%	10%
W.C. O’Neill Arena	2%	3%	0%	4%	10%
Charlotte County Archives	2%	0%	3%	4%	10%
Oppenheimer Prager Museum	0%	0%	3%	0%	23%
Bicycle rentals	0%	0%	6%	4%	0%
St. Andrews tennis courts	0%	0%	3%	0%	7%

The next table indicates the minimum number of people that participated in each activity. The number is based on the percentage of campers that indicated they participated in each activity (table above) multiplied by the number of bookings by camper type (e.g. 70% of the 2,740 overnight camper respondents explored tidal beaches resulting in at least 1,718 participants). This is a minimum estimate since there is an average of 2.8 people for each overnight camper booking so more people likely participated. All subsequent tables showing “number of participants” are derived the same way.

*Table A2. Attractions visited in St. Andrews by camper type (number of participants)*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal	Total
Tidal beaches	4,823	1,171	66	681	132	6,873
Town wharf	3,316	1,505	81	510	137	5,550
Ministers Island	3,015	1,004	63	783	93	4,957
Farmers Market	2,713	251	84	170	142	3,360
Historic architecture	2,562	585	45	374	63	3,631
Town parks	2,562	836	54	204	102	3,760
Van Horne Trail	2,261	669	69	204	132	3,335
St. Andrews Blockhouse	1,809	669	54	272	78	2,882
Whale watching	1,809	251	36	306	39	2,441
Kingsbrae Garden	1,507	753	42	544	122	2,969
Fundy Discovery Aquarium	1,206	753	33	238	68	2,298
1800s churches etc.	904	84	33	544	59	1,624
Pendlebury Lighthouse	754	84	30	102	54	1,023
Algonquin golf course	754	251	9	-	10	1,023
Sheriff Andrews House	603	84	21	34	49	790
St Andrews creative playground	603	251	21	-	63	938
Charlotte County Court House	452	-	18	510	54	1,034
Ross Memorial Museum	452	-	27	-	44	523
Charlotte County Gaol	301	-	9	408	34	753
Sunbury Shores Arts/Nature	301	167	18	34	24	545
Guided beach walk	301	-	3	102	5	411
Sea kayak rentals/tours	301	-	9	-	-	311
Other	301	-	3	-	-	304
Guided heritage tours	151	-	18	442	24	636
Sea fishing	151	167	-	-	15	333
W.C. O’Neill Arena	151	84	-	34	15	283
Charlotte County Archives	151	-	3	34	15	202
Oppenheimer Prager Museum	-	-	3	-	34	37
Bicycle rentals	-	-	6	34	-	40
St. Andrews tennis courts	-	-	3	-	10	13
<b>Total</b>	<b>34,216</b>	<b>9,617</b>	<b>865</b>	<b>6,567</b>	<b>1,615</b>	<b>52,881</b>



*Table A3. Attractions visited in St. Stephen by camper type (% participation)*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
Restaurants/cafés	17%	6%	47%	36%	70%
Riverfront Trail	17%	0%	25%	7%	20%
Chocolate Museum	11%	9%	38%	32%	27%
Farmers Market	11%	3%	38%	18%	50%
Chain stores and boutiques	7%	9%	44%	7%	80%
Elm Street Park	7%	0%	3%	0%	10%
Charlotte County Museum	2%	3%	3%	4%	3%
Ganong Nature Park	2%	0%	9%	4%	20%
Choc. heritage walking tour	0%	0%	0%	4%	3%
Garcelon Civic Centre	0%	0%	3%	0%	7%

*Table A4. Attractions visited in St. Stephen by camper type (number of participants)*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal	Total
Restaurants/cafés	1,206	167	45	340	102	1,861
Riverfront Trail	1,206	-	24	68	29	1,327
Chocolate Museum	754	251	36	306	39	1,386
Farmers Market	754	84	36	170	73	1,117
Chain stores and boutiques	452	251	42	68	117	930
Elm Street Park	452	-	3	-	15	470
Charlotte County Museum	151	84	3	34	5	276
Ganong Nature Park	151	-	9	34	29	223
Choc. heritage walking tour	-	-	-	34	5	39
Garcelon Civic Centre	-	-	3	-	10	13
<b>Total</b>	<b>5,125</b>	<b>836</b>	<b>202</b>	<b>1,055</b>	<b>425</b>	<b>7,643</b>

*Table A5. Attractions visited in St. George/Blacks Harbour/New River Beach by camper type (% participation)*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
Car ferries to Fundy Isles	17%	0%	13%	0%	20%
St. George gorge & fishway	7%	3%	28%	4%	33%
New River Beach Prov. Park	4%	3%	19%	0%	27%
Covered bridges	2%	0%	22%	4%	17%
Green's Point Lighthouse	0%	0%	16%	0%	20%
Pea Point Nature Preserve	0%	0%	3%	0%	3%

Note: Shopping and eating out in St. George was not included in the survey questions but was recorded in many write-in entries as an important reason for visiting that community.

*Table A6. Attractions visited in St. George/Blacks Harbour/New River Beach by camper type (number of participants)*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal	Total
Car ferries to Fundy Isles	1,206	-	12	-	29	1,247
St. George gorge & fishway	452	84	27	34	49	646
New River Beach Prov. Park	301	84	18	-	39	442
Covered bridges	151	-	21	34	24	230
Green's Point Lighthouse	-	-	15	-	29	44
Pea Point Nature Preserve	-	-	3	-	5	8
<b>Total</b>	<b>2,110</b>	<b>167</b>	<b>96</b>	<b>68</b>	<b>176</b>	<b>2,618</b>

*Table A7. Attractions visited in Fundy Isles by camper type (% participation)*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
Marine car ferries	15%	9%	41%	4%	37%
Grand Manan lighthouses	15%	0%	13%	0%	20%
Deer Island Point lighthouse	11%	6%	38%	0%	30%
Grand Manan Trails	11%	0%	6%	0%	7%
Roosevelt Campobello Intl Park	9%	3%	13%	18%	7%
Head Harbour lighthouse	4%	0%	9%	7%	0%
Old Sow Whirlpool	4%	3%	28%	0%	17%
Grand Manan Museum	4%	0%	3%	0%	3%
Herring Cove Prov. Park	2%	0%	13%	0%	3%
Anchorage Prov. Park	2%	0%	3%	0%	10%

*Table A8. Attractions visited in Fundy Isles by camper type (number of participants)*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal	Total
Marine car ferries	1,055	251	39	34	54	1,433
Grand Manan lighthouses	1,055	-	12	-	29	1,096
Deer Island Point lighthouse	754	167	36	-	44	1,001
Grand Manan Trails	754	-	6	-	10	769
Roosevelt Campobello Intl Park	603	84	12	170	10	879
Head Harbour lighthouse	301	-	9	68	-	379
Old Sow Whirlpool	301	84	27	-	24	437
Grand Manan Museum	301	-	3	-	5	309
Herring Cove Prov. Park	151	-	12	-	5	168
Anchorage Prov. Park	151	-	3	-	15	168
<b>Total</b>	<b>5,426</b>	<b>585</b>	<b>160</b>	<b>272</b>	<b>195</b>	<b>6,639</b>

*Table A9. Attractions visited in McAdam by camper type (% participation)*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal
McAdam Railway Station	4%	3%	16%	0%	17%
Spednic Lake Park	0%	0%	0%	0%	3%

*Table A10. Attractions visited in McAdam by camper type (number of participants)*

	Overnight	Weekend	Vacation	Caravan/Rally	Seasonal	Total
McAdam Railway Station	301	84	15	-	24	425
Spednic Lake Park	-	-	-	-	5	5
<b>Total</b>	<b>301</b>	<b>84</b>	<b>15</b>	<b>-</b>	<b>29</b>	<b>429</b>

# APPENDIX B – SURVEY INSTRUMENT

## Oceanfront Camping User Survey

### Please participate

The Kiwanis Club of St. Andrews has operated Oceanfront Camping for over 70 years to serve visitors to the St. Andrews area and fund a wide range of local youth and community projects.

In 2018 we're conducting a special survey to find out how the campground contributes to the local economy, how it compares with other New Brunswick accommodations and what we and area businesses can do to serve you and others better in the future.

You've been selected to fill out one of our surveys, and we hope that you will. By doing so, you'll immediately receive a collectible St. Andrews Trade Coin and be entered in a monthly \$100 cash prize draw (mailed to the winner). The information you give on the survey is pooled, strictly anonymously, with that from other campground users, for statistical use. If you have any questions about the survey please contact survey staff Lee Sochasky (506-529-4909, lee.sochasky@rogers.com) or Gregor MacAskill (506-939-2261, gregmacaskill@gardnerpinfold.ca).

*Thank you for your help!*

### A little background

1. Where do you live? Country \_\_\_\_\_ State/Prov \_\_\_\_\_ Postal/zip code \_\_\_\_\_

2. How did you find out about Oceanfront Camping?  Always known it  Social media  Tour operator  
 Family/friends  Travel guide  Found by chance  
 Website  Other (indicate) \_\_\_\_\_

3. Is this your first stay at Oceanfront Camping?  Yes  No. If so, when were you last here? \_\_\_\_\_

4. Why did you decide to stay here? (check all that apply)  St. Andrews destination  Facilities  Here for a certain event  
 Oceanfront setting  Price  Convenient stop on longer trip  
 Other (indicate) \_\_\_\_\_

5. From the time you left home until you return, how long is your trip? \_\_\_\_\_ days

6. How many days are being spent in New Brunswick? \_\_\_\_\_ days

7. When did you arrive at Oceanfront Camping? Month \_\_\_\_\_ Day \_\_\_\_\_

8. When are you departing? Month \_\_\_\_\_ Day \_\_\_\_\_

9. Including you, how many people are staying here with you fulltime? \_\_\_\_\_

Including you, how many are in these age groups?

\_\_\_\_\_ Under 19 \_\_\_\_\_ 19-34 \_\_\_\_\_ 35-49 \_\_\_\_\_ 50-69 \_\_\_\_\_ Over 69

10. How many other people are staying part time or visiting you? \_\_\_\_\_

How many are in these age groups?

\_\_\_\_\_ Under 19 \_\_\_\_\_ 19-34 \_\_\_\_\_ 35-49 \_\_\_\_\_ 50-69 \_\_\_\_\_ Over 69

Survey # \_\_\_\_\_

**While you were here...**

**11. What did you do directly in St. Andrews?**

*(please check all that apply)*

	Once	A few times	Regularly
Visit family and friends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eat out	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buy groceries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buy gas and supplies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shop for yourself and for gifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Just relax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visit local attractions (see partial list on next page)			
History, Culture, Arts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nature based	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adventure, Recreation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend local events and performances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Take part in a learning activity or course	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walk our trails, beaches or streets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bicycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**12. Thinking about all of the above activities, how much do you estimate that your entire party will spend in St. Andrews on this trip, on the following?**

- Gas, vehicle repairs, RV parts, etc.                   \$ \_\_\_\_\_
- Groceries and beverages (incl. alcohol)           \$ \_\_\_\_\_
- Eating out   \$ \_\_\_\_\_
- Local attractions, performances, events           \$ \_\_\_\_\_
- Other (shopping, gifts, etc.)                         \$ \_\_\_\_\_

**13. Did you side trip to nearby places outside of St. Andrews? If so, would you note these?**

Town or place	Main activities (use the above list and more – see the next page for ideas)
_____	_____
_____	_____
_____	_____
_____	_____

**14. If you don't live in New Brunswick, are you planning to visit other parts of the province on this trip? If so, which places?**

\_\_\_\_\_

**15. To put your stay here in a larger perspective, if possible can you estimate how much you and those with you will spend on your entire trip? Try to estimate the total cost by everyone, from the time you left home until you returned (including all cash/credit transactions and taxes) for transportation, accommodation, food, entertainment, gifts and other purchases, whether paid for by you or someone else) \$ \_\_\_\_\_**

If not in Canadian dollars, in what currency? \_\_\_\_\_

Survey # \_\_\_\_\_

### ***Did you visit some of these local attractions?***

If so, please check them off to help you (and us) with your answers on the "While you were here" page.

**Tip:** Find out about these and more at [www.bayofffundystartshere.com](http://www.bayofffundystartshere.com) and [www.standrewsbythesea.ca](http://www.standrewsbythesea.ca)

#### **St. Andrews**

##### **History, Culture & Arts**

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Charlotte County Court House  | <input type="checkbox"/> Historic architecture (everywhere!) | <input type="checkbox"/> Ross Memorial Museum              |
| <input type="checkbox"/> Charlotte County Gaol         | <input type="checkbox"/> Minister's Island                   | <input type="checkbox"/> Sheriff Andrews House             |
| <input type="checkbox"/> 1800s churches and cemeteries | <input type="checkbox"/> Oppenheimer Prager Museum           | <input type="checkbox"/> St. Andrews Blockhouse            |
| <input type="checkbox"/> Farmers Market                | <input type="checkbox"/> Pendlebury Lighthouse               | <input type="checkbox"/> Sunbury Shores Arts/Nature Centre |
| <input type="checkbox"/> Guided heritage tours         |  |  |

##### **Nature-based**

- |  |   |
|--|---|
| <input type="checkbox"/> Fundy Discovery Aquarium          | <input type="checkbox"/> Tidal beaches (self-explore!)                  |
| <input type="checkbox"/> Guided beach walk & coastal tours | <input type="checkbox"/> Town wharf                                     |
| <input type="checkbox"/> Kingsbrae Garden                  | <input type="checkbox"/> Town parks: Centennial, Indian Point, Langmaid |

##### **Adventure & Recreation**

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Algonquin Golf Course     | <input type="checkbox"/> Sea kayak rentals and tours     | <input type="checkbox"/> St. Andrews W.C. O'Neill Arena |
| <input type="checkbox"/> Bicycle rentals and tours | <input type="checkbox"/> St. Andrews creative playground | <input type="checkbox"/> Van Horne Trail                |
| <input type="checkbox"/> Sea fishing               | <input type="checkbox"/> St. Andrews tennis courts       | <input type="checkbox"/> Whale watching                 |

##### **Learning experiences** (Adult or children's courses at these)

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Fundy Discovery Aquarium | <input type="checkbox"/> St. Andrews Arts Council          | <input type="checkbox"/> Charlotte County Archives |
| <input type="checkbox"/> Kingsbrae Garden         | <input type="checkbox"/> Sunbury Shores Arts/Nature Centre | (genealogical research)                            |

#### **Nearby St. Stephen**

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Chain stores and boutiques      | <input type="checkbox"/> Elm Street Park       | <input type="checkbox"/> Restaurants and cafes |
| <input type="checkbox"/> Charlotte County Museum         | <input type="checkbox"/> Farmers Market        | <input type="checkbox"/> Riverfront Trail      |
| <input type="checkbox"/> Chocolate Museum                | <input type="checkbox"/> Ganong Nature Park    |  |
| <input type="checkbox"/> Chocolate Heritage Walking Tour | <input type="checkbox"/> Garcelon Civic Centre |  |

#### **Nearby St. George / Black's Harbour/ New River Beach**

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Car ferries to the Fundy Isles  | <input type="checkbox"/> Green's Point (L'Etete) lighthouse | <input type="checkbox"/> Pea Point Nature Preserve    |
| <input type="checkbox"/> Nearby historic covered bridges | <input type="checkbox"/> New River Beach Provincial Park    | <input type="checkbox"/> St. George gorge and fishway |

#### **Nearby Fundy Isles**

C - Campobello, D - Deer Island, G - Grand Manan

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> All: Marine car ferries            | <input type="checkbox"/> D: Deer Island Point lighthouse   | <input type="checkbox"/> G: Grand Manan Museum |
| <input type="checkbox"/> C: Herring Cove Prov'l Park & golf | <input type="checkbox"/> D: Old Sow Whirlpool lookout      | <input type="checkbox"/> G: Grand Manan trails |
| <input type="checkbox"/> C: Roosevelt Campobello Int'l Park | <input type="checkbox"/> G: Anchorage Provincial Park      |  |
| <input type="checkbox"/> C: Head Harbour lighthouse         | <input type="checkbox"/> G: Grand Manan lighthouses (many) |  |

#### **Nearby McAdam**

- |  |   |
|--|---|
| <input type="checkbox"/> Historic McAdam Railway Station | <input type="checkbox"/> Spednic Lake Provincial Park |
|--|---|

Survey # \_\_\_\_\_

***Optional questions***

**How can we improve?**

**At Oceanfront Camping**

**16. What did you like best about the facilities, staff and activities at our campground?**

\_\_\_\_\_

**17. What improvements can you suggest to any of these?**

\_\_\_\_\_  
\_\_\_\_\_

**In St. Andrews and area**

**18. What did you like best about your stay in St. Andrews and the area?**

\_\_\_\_\_

**19. What improvements can you suggest to any of these?**

Local visitor facilities and services

\_\_\_\_\_

Information (what to do, where to go, etc.)

\_\_\_\_\_

Recreational facilities

\_\_\_\_\_

Learning opportunities (history, culture, nature, arts, sports)

\_\_\_\_\_

Events and performances

\_\_\_\_\_

Dining

\_\_\_\_\_

Shopping

\_\_\_\_\_

Other (is there something you would have liked to see, experience or learn about that we've missed?)

\_\_\_\_\_

\_\_\_\_\_

Please leave your completed survey **at the campground office** on your departure to receive your commemorative St. Andrews Trade Coin and enter the \$100 monthly prize draw.

**Thank you again!**

Survey # \_\_\_\_\_

## **APPENDIX C – CAMPER QUOTES**

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The survey contained an open-ended question allowing participants to comment on what they like most about the Oceanfront campground and St. Andrews. The following represents a sample of the responses.

*We found your town by accident and loved it. Beyond any doubt we will return. It's a wonderful place.* **South Carolina**

*Location (view), friendly staff, clean. 100% perfect park!* **Ontario**

*Fab view – we return all the time!* **Ontario**

*Best campground we have stayed at.* **New Brunswick**

*St. Andrews Oceanfront Camping is the ONLY place that we have EVER parked our trailer. The amazing facilities, fantastic staff and friendly campers make this campground the only place we want to be. When we return to Ontario, we always rave about St. Andrews-by-the-Sea!* **Ontario**

*We love it here!* **Ontario**

*We have been coming here for years and have encouraged others who now come annually!* **Quebec**

*We have been coming to St. Andrews Kiwanis campground every summer for the past 15 years, spending the whole month of July and sometimes August.* **New Brunswick**

*Love the town. Very friendly, clean, lots to do. Great trail system. Love the architecture. Very quaint and picturesque.* **British Columbia**

*Spending a winter in St. Andrews is on my bucket list! We have visited 6-7 times in summer.* **Florida**

*Winnebago Outdoor Adventures has been stopping here as part of our Maritime Canada tour for the last 23 years.* **New Hampshire**

*As a town, don't underestimate the buying power of RV owners. Your Kiwanis campground is very popular for RVers in USA.* **Florida**

*Love this campground – come every year.* **New Brunswick**

*St. Andrews has everything we want/need as our summer get-away.* **New Brunswick**

*We have spent 19 summers here and love the climate, the water view and the friendly people.* **New Brunswick**