

2011 Snowmobile Owners Survey

Executive Summary

\$868 Million - Economic Impact of the Snowmobile Industry in New York State - 2010-2011

The total economic impact of the snowmobile industry in New York State was calculated by estimating the expenditures of the statewide snowmobiling community from the data collected from the random sample group of snowmobile owners. Total direct spending by snowmobile owners in New York State during 2010-2011 is estimated to be approximately, \$434 million. In addition to direct spending, indirect spending must be considered. Utilizing a conservative indirect multiplier, the total economic impact of spending by the snowmobiling community in New York State is estimated at \$868 million.

Survey Process

Building on similar work undertaken in 1997 and 2003, a random sample of 6,000 paper surveys was mailed in November 2011 to owners of snowmobiles registered in New York State the previous snowmobile season. In addition, the New York State Snowmobile Association (NYSSA) requested that the online survey be made available to its 69,000 members. From the random sample group of respondents, 1,203 surveys were returned. From the NYSSA membership group, 4,713 surveys were completed.

Part 1: Profile of a Snowmobiling Household

- More than 91% of the respondents reported that they were members of a snowmobile club or NYSSA.
- Approximately 14% of all of the respondents from both survey groups reported that they reside in a state other than New York State.
- Combined, all respondents reported snowmobiling an average of 23.5 years.

- The average number of snowmobiles owned by all of the respondents was 2.42.
- More than 55% reported combined household income over \$80,000.

Part 2: Snowmobile Usage and Expenditures

- 92% of all respondents reported that they had insurance for their snowmobiles, paying an average of \$270 for the year.
- More than 66% of the respondents reported that they trailered their snowmobiles to another area of the state at an average of 8.5 days during the 2010-2011-winter season.
- The average number of days spent snowmobiling during the 2010-2011 season was, approximately, 22 days for the respondents from both survey groups.
- The total number of days spent snowmobiling as reported by 5,916 respondents was 123,373. For the 90,000 households in New York State, it is reasonable to calculate that the total number of days spent snowmobiling was 1,980,000.
- The largest percentage of the days spent snowmobiling was in the Adirondack region, followed by the Tug Hill Plateau region and the Central New York region.
- Approximately 40% of the respondents reported that they took an overnight snowmobiling trip during 2010-2011.
- The average annual household expenditure for the NYSSA member group was \$3,561.29.

Part 3: Safety, Convenience and Support Services

- Of twelve measures regarding safety and convenience on New York State trails, respondents reported highest percentages of satisfaction with Overall Safety on Trails (more than 90%), Trail Placement (more than 88%) and Identification of Hazards on Trails (more than 86%).

Part 4: Snowmobile Regulations and Trail Maintenance Fees

- Approximately 55% of the respondents to the survey reported that at least one member in the family has taken the snowmobile safety course.
- More than 96% of both groups reported no problems obtaining a snowmobile registration in New York State.
- More than 60% from both survey groups reported that they have never had a problem with or witnessed an intoxicated snowmobile operator.
- More than 96% of both groups of respondents indicated they had heard about NYSSA. More than 95% of the random sample group perceives NYSSA as beneficial. More than half of the NYSAA Member group and almost 44% of the random sample group reported that their perception of the organization and the role it plays is "very beneficial".

Part 5: Promoting Snowmobiling in New York State

- Snowmobile owners were asked to list, in rank order, the three most important things that they believed NYSSA should do to promote and improve snowmobiling in New York State. The highest priority identified by the respondents was "protecting the trail fund." The second and third highest priorities were "stopping anti-snowmobiling laws and policies" and "improving and enhancing the safety and enjoyment of the trail system."

Part 6: General Information

- The average age of the NYSSA member group of respondents was 47.68 years. The average age of the random sample group was slightly older at 48.42 years.
- Approximately 90% of both survey groups responding were male.

- The largest percentage of both survey groups reported that their combined household income was between \$100,000 and \$150,000.

Conclusion

Snowmobiling has experienced significant economic growth since the first owner survey was conducted in 1997. This growth has occurred despite the strong economic downturn of the last decade and significant increases in the price of gasoline. With a full 28% of snowmobile person/days occurring within the Adirondack Park it should be a reminder of the importance of public trails within that area and the role snowmobiling plays in the small communities of the Adirondack Park. Nearly 20% of the sport takes place on the Tug Hill which also holds the number one county (Lewis) for second homes that are owned primarily for their snowmobiling opportunities.

Discussion of the Snowmobile Owners Survey

During the Fall of 2011, staff at the Potsdam Institute for Applied Research (PIAR) and the Executive Director of the New York State Snowmobile Association (NYSSA) reviewed and re-designed the survey distributed in July of 1997 and July of 2003 to owners of snowmobiles registered in New York State. The 2011 survey included most of the items from the original two surveys, particularly questions regarding financial impact, while adding new questions about current topics important to the snowmobiling community. It was important to replicate the previous two studies as closely as possible to provide comparative data.

The final version of the survey was reproduced as a paper survey for distribution to randomly sampled owners of registered snowmobiles. In addition, an online version, accessible to the random sample group as well as the membership of the New York State Snowmobile Association electronic mailing list, was created on a secure website.

Description of the Survey

The revised survey had forty-three questions, some with several parts, divided into six sections. In addition, the survey was accompanied by a cover letter with an endorsement of the survey by Gary Broderick, President of NYSSA as well as a self-addressed, stamped envelope returnable to PIAR.

Part I: Profile of Your Snowmobiling Household – This section included seven questions requesting information about where the household resides, numbers of participants in snowmobiling, mobility limitations, membership in a snowmobile club and number of snowmobiles in the household. Respondents were allowed to provide additional information for as many as five snowmobiles.

Part II: Snowmobile Usage and Expenditures – This section asked participants about snowmobiling expenditures during the 2010-2011 winter season. Questions included expenses for rental, insurance, transportation, maintenance, clothing and accessories, lodging and meals within and outside of New York State. In addition, several questions were asked regarding distance traveled and location of visits to areas within New York State.

Part III: Safety, Convenience and Support Services – This section asked participants to rate twelve aspects of snowmobiling on New York State trails, as well as access to four types of support services along the trail systems.

Part IV: Snowmobile Regulations and Trail Maintenance Fees - This section asks several questions about the snowmobile safety course, the Trail Development and Maintenance Fund, the highway fuel tax refund process, snowmobile registration, intoxicated snowmobile operators, law enforcement presence on the trails, snowmobiling information sources and the New York State Snowmobile Association (NYSSA).

Part V: Promoting Snowmobiling in New York State – This section asked participants to rank order activities which they believed should be the priorities of the New York State Snowmobile Association (NYSSA). Eight possibilities were specified, although participants were free to identify any other idea.

Part VI: General Information – This final section of the survey asks participants for demographic information regarding age, gender, number of people in the household, employment, combined household income, education, and home ownership.

Survey Process

A random sample of 6,000 paper surveys was mailed at the end of November, 2011 via USPS Bulk Mail to owners of snowmobiles registered in New York State. Total registration of snowmobiles was approximately 134,000 sleds, according to the New York State Department of Motor Vehicles for 2010-2011. The number of unduplicated addresses was just over 90,000. The random sample was drawn from the unduplicated list of addresses and included out of state registrants. Oversampling was done for several counties in the northern most counties of New York State to insure that enough responses would be received to be representative of those areas.

The survey questions were, also, made available in an online format using a domain of the Potsdam Institute for Applied Research (PIAR). Participants were able to access the survey via the Internet through a secure website, utilizing an SSL certificate with high grade 256-bit encryption. Each paper survey had a unique serial number which participants used to log-in to the website.

In addition, the New York State Snowmobile Association requested that the online survey be made available to its e-mail list of, approximately, 69,000 members. An e-mail “blast” was sent to that list on December 13, 2011 inviting the members to complete the survey online. This group of participants did not need a log-in number to access the survey.

As a result of the e-mail “blast”, sending the invitation to participate all at once to 69,000 potential respondents, a technical problem occurred which took approximately two weeks to correct. The system at PIAR was unable to keep up with the volume of responses and the computer server crashed multiple times. In addition, the software being utilized was not always displaying the survey questions in a readable format to the viewer. Diligent problem solving by the technical staff at PIAR, attentive communication by NYSSA with its membership and patience by the NYSSA members allowed resolution by the end of December.

To compensate for the technical problems, the survey completion date was extended and surveys were accepted until January 15, 2012. In addition, a small number of participants (approximately 25) from the “e-mail list” were provided with paper copies of the survey due to their computer’s inability to display the survey properly. These participants contacted PIAR directly for assistance.

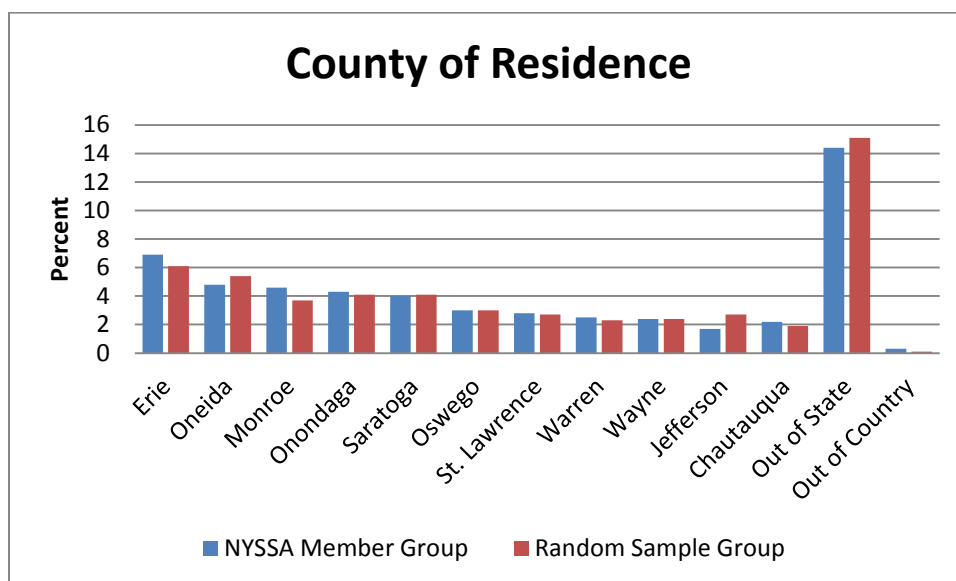
From the random sample group of respondents, 1,203 surveys were returned to PIAR or completed using the online version. This is a response rate of 20%. From the NYSSA membership group, 4,713 surveys were completed for a response rate of 7%. This lower response rate may be a result of the technical difficulties encountered by members who attempted to respond during the period when the survey was not available.

General Discussion of Survey Results

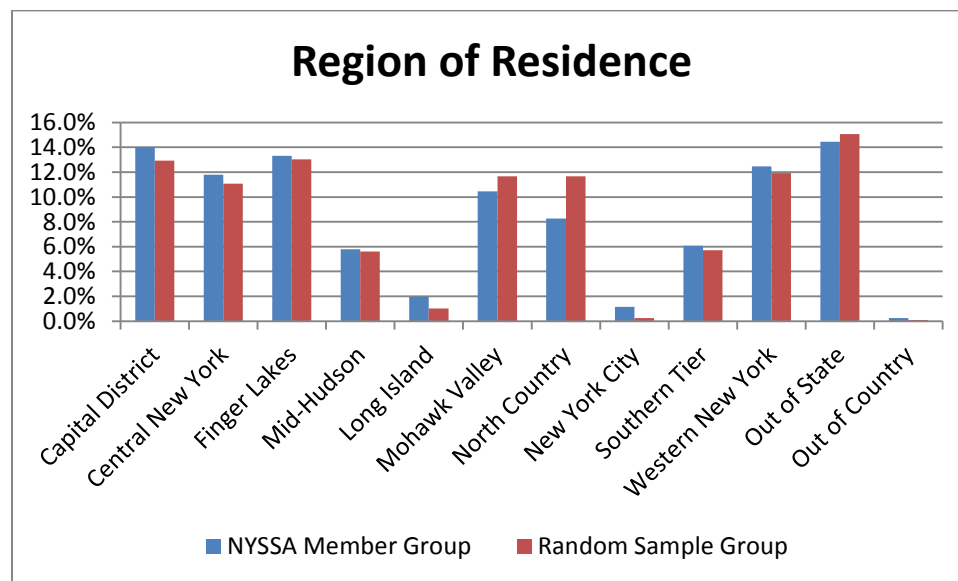
Results were tabulated for the random sample and NYSSA member groups separately. With a few exceptions, the results of each group are very similar for all of the questions.

Part I: Profile of Your Snowmobiling Household

Approximately 84% in both groups reported that they were residents of New York State. Nine counties, Erie, Oneida, Monroe, Onondaga, Saratoga, Oswego, St. Lawrence, Warren and Wayne counties made the top ten counties of residence list for both respondents groups. For the random sample of snowmobilers, Jefferson County was among the top ten and, for the NYSSA members survey group, Chautauqua County made the top ten list.



The counties of residence were organized into the ten economic development regions as used by the New York Empire State Development Agency. The Capital District and the Finger Lakes regions had the largest number of respondents.

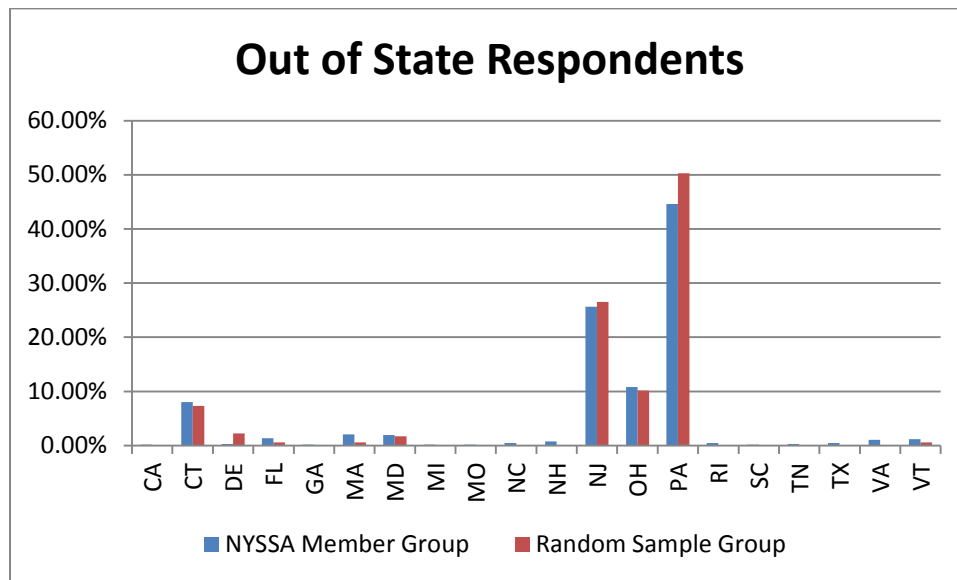


Note:

NYS Empire State Development regions include the following counties:

- **Capital District:** Albany, Columbia, Greene, Rensselaer, Saratoga, Schenectady, Warren, Washington
- **Central New York:** Cayuga, Cortland, Madison, Onondaga, Oswego
- **Finger Lakes:** Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming, Yates
- **Mid-Hudson:** Dutchess, Orange, Putnam, Rockland, Sullivan, Ulster, Westchester
- **Long Island:** Nassau, Suffolk
- **Mohawk Valley:** Fulton, Herkimer, Montgomery, Oneida, Otsego, Schoharie
- **North Country:** Clinton, Essex, Franklin, Hamilton, Jefferson, Lewis, St. Lawrence
- **New York City:** Bronx, Kings, New York, Queens, Richmond
- **Southern Tier:** Broome, Chemung, Chenango, Delaware, Otsego, Schuyler, Steuben, Tioga, Tompkins
- **Western New York:** Allegany, Cattaraugus, Chautauqua, Erie, Niagara

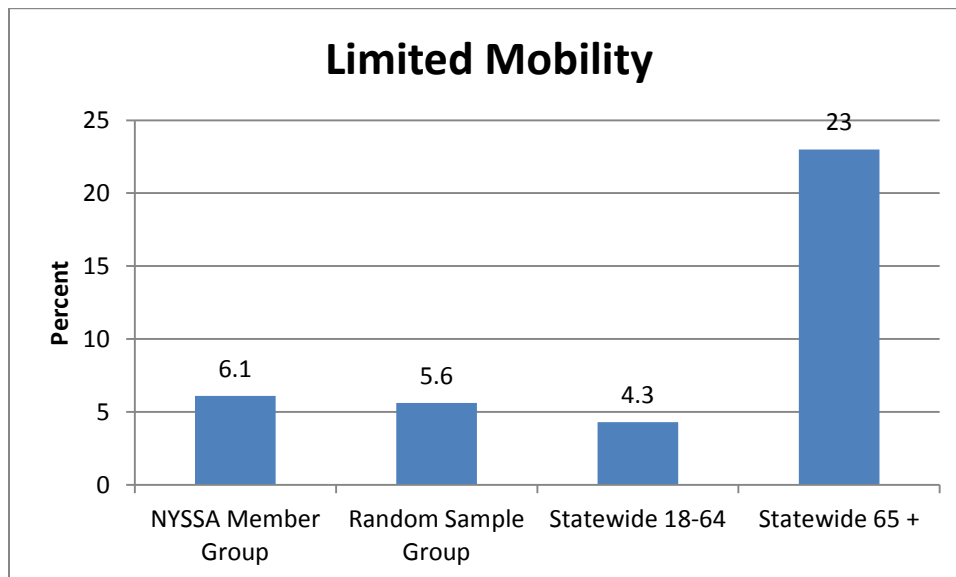
Approximately fourteen percent of all of the respondents from both survey groups reported that they reside in states other than New York State. The random sample group had respondents from nine states with over ninety-four percent from Pennsylvania (50%), New Jersey (27%), Ohio (10%) and Connecticut (7%). The NYSSA Member group had respondents from twenty states with over eighty-nine percent from Pennsylvania (45%), New Jersey (26%), Ohio (11%) and Connecticut (8%).



Combined, all respondents reported snowmobiling an average of 23.5 years. The random sample group reported an average of one additional year of snowmobiling with 24.5 years. Responses ranged from 1 year of participation to 62 years. Fifty-three percent reported that they began snowmobiling in 1980 or earlier.

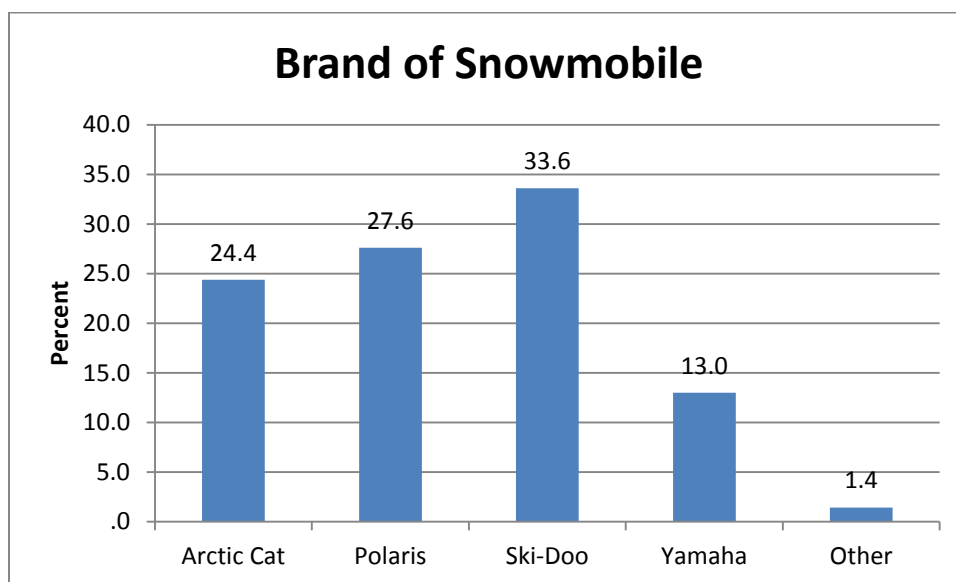
The random sample group of respondents had, on average, 3.10 members in their household while the NYSSA Members survey group reported an average of 3.11 household members. On average, 2.69 of the random sample group's household members participate in snowmobiling, while 2.74 of the NYSSA Members group's household engage in the sport.

Approximately six percent (6%) of the respondents reported a household member with limited mobility. This compares to four percent (4%) statewide of 18-64 year olds and twenty-three percent (23%) statewide of individuals 65 and older, according to American Fact Finder using 2010 Census Data.

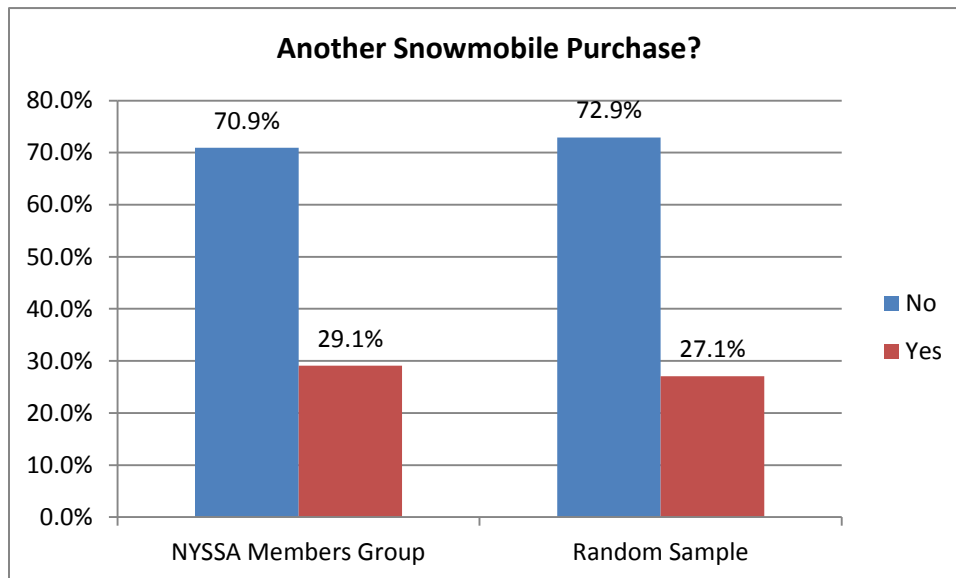


Snowmobile Sled Data

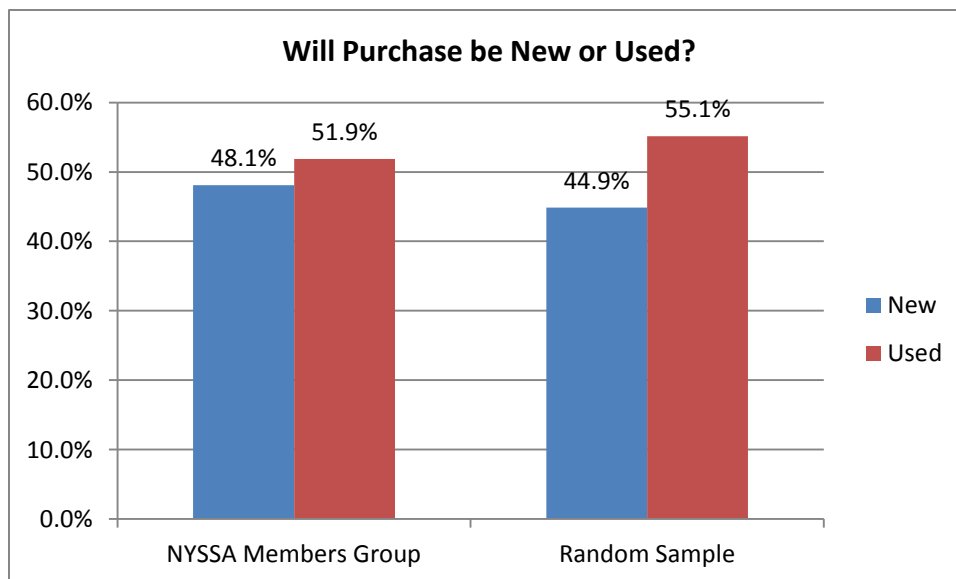
Information was provided by the respondents for 12,772 sleds. The average number of snowmobiles owned by all of the respondents was 2.42. The most frequently cited number of snowmobiles owned was two (the mode). Almost half (46%) were purchased as new vehicles. Almost ninety percent (86%) are two stroke models. The most frequently reported model year was 2006. One half of the sleds are newer than 2004 (the median age). Ski-Doo was the most frequently cited brand of snowmobile.



Respondents were asked if it was likely that they would purchase another snowmobile in the coming year, and if so, would it be new or used. Just under thirty percent of each group indicated that another snowmobile would be purchased in the coming year.



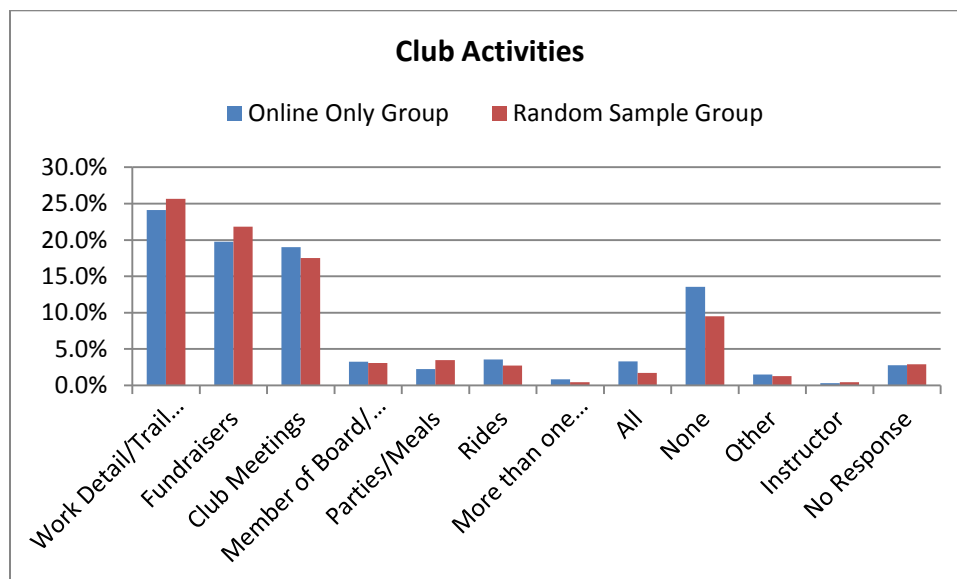
Of those intending to purchase another snowmobile, there was an almost even split between new and used snowmobiles for the NYSSA Member group. The random sample group had about ten percent more planning to purchase a new snowmobile.



Over 91% of the respondents reported that they were members of a snowmobile club or NYSSA. Membership in a club entitled the snowmobile owner to a reduced registration fee for each snowmobile, saving \$55 per sled registered. This benefit has significantly increased the percentage of membership in snowmobile clubs compared to 1997 when forty-three percent (43%) of snowmobilers reported belonging to a club.

Of those respondents who indicated that they were not members of a club, the most often cited reasons for not joining a club was that the club activities were not suited to their stage of life (26%) or that the respondent didn't snowmobile often enough (19%).

Approximately, forty-six percent (46%) of the respondents who indicated that they were members of a snowmobile club responded to the question asking what type of activities they participate in with the club. The three most frequently cited activities were Work Detail/Trail Maintenance activities (one quarter of the respondents), followed by Fundraisers (approximately 20%), and Club Meetings (approximately 19%).



Part II: Snowmobile Usage and Expenditures

Slightly more than two percent (2%) of the random sample respondents reported that they had rented a snowmobile during the last year. The NYSSA Member group respondents reported that almost three percent (3%) had rented a snowmobile. After compiling the data for both groups, the average expense for snowmobile rental in New York State was almost \$600. For those respondents who reported renting a snowmobile outside of New York State, the average expense was almost \$800.

Ninety-two percent (92%) of all of the respondents reported that they had insurance for their snowmobiles, paying an average of \$270 dollars for the year.

Over 3800 of the respondents (66%) reported that they trailered their snowmobiles to another area of the state an average of 8.5 days during the 2010-11 winter season. A larger percentage of the random

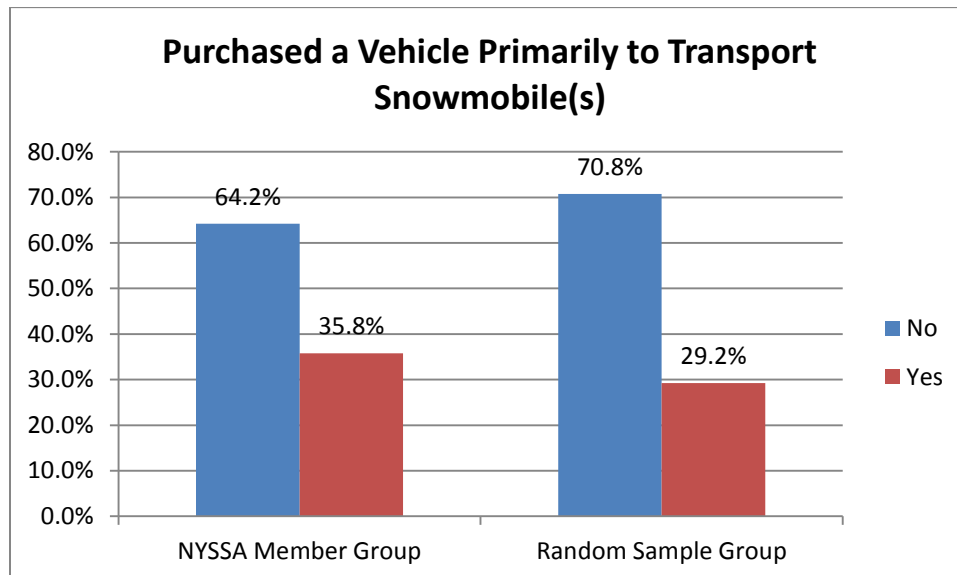
sample group (72%) reported that they trailered their snowmobiles. The random sample group trailered their snowmobile an average of 10.5 days.

Highway Tolls

Both groups of respondents spent an average of, approximately, \$100 per year on highway tolls. The NYSSA member groups' average was slightly higher at \$114 compared to the random sample group's average of \$105. For both groups of respondents, the most frequent response was \$50 spent on highway tolls.

Snowmobile Transport

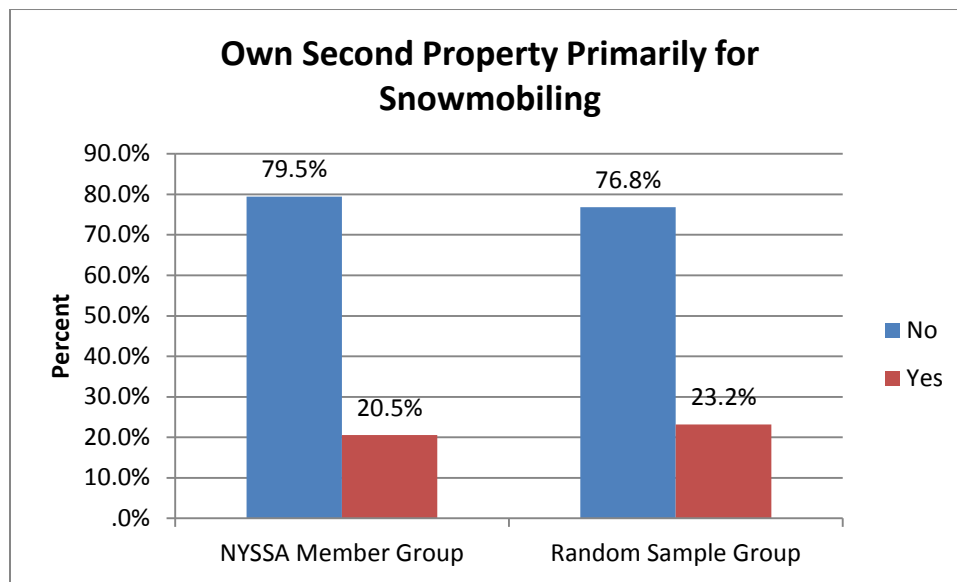
Approximately thirty-six percent (35.8%) of the NYSSA member group respondents and twenty-nine percent (29.2%) of the random sample group respondents reported that they had purchased a vehicle primarily to be able to transport their snowmobile(s).



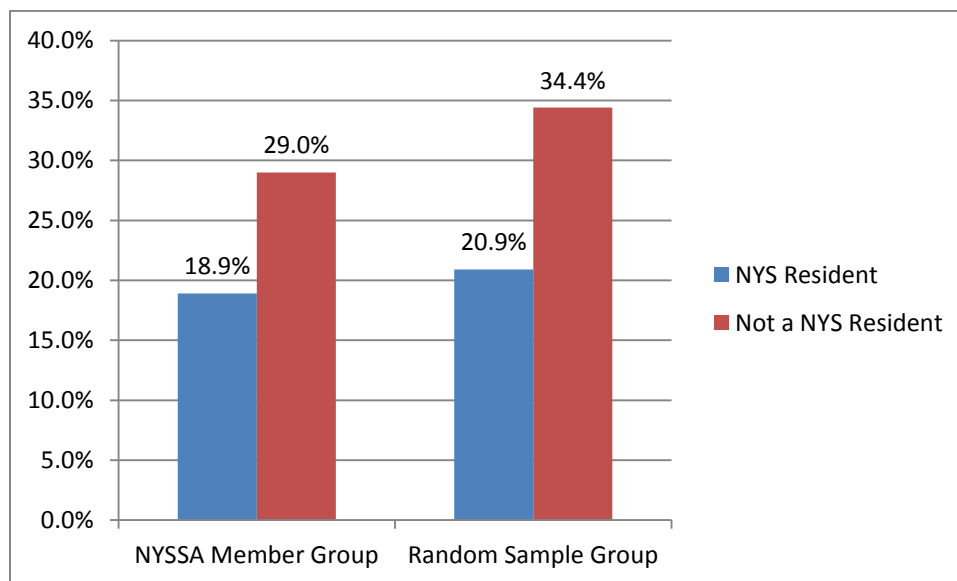
The average additional cost of the vehicle purchased to transport a snowmobile reported by the respondents from both survey groups was, approximately, \$9800. The average cost spent on maintenance, parts and supplies for the vehicle used to transport snowmobiles was a bit higher for the NYSSA member group respondents at \$1,434 as compared to \$1,378 for the random sample group.

On average, the random sample group of respondents spent \$2,898 and the NYSSA member group spent \$2,731 on the purchase, maintenance, etc. for trailers to transport their snowmobile(s).

Approximately one in five of the respondents reported that they own a second home, camp, or property that is used primarily for snowmobiling.



New York State residents who responded to this survey were less likely to report that they own a second property primarily for snowmobiling.

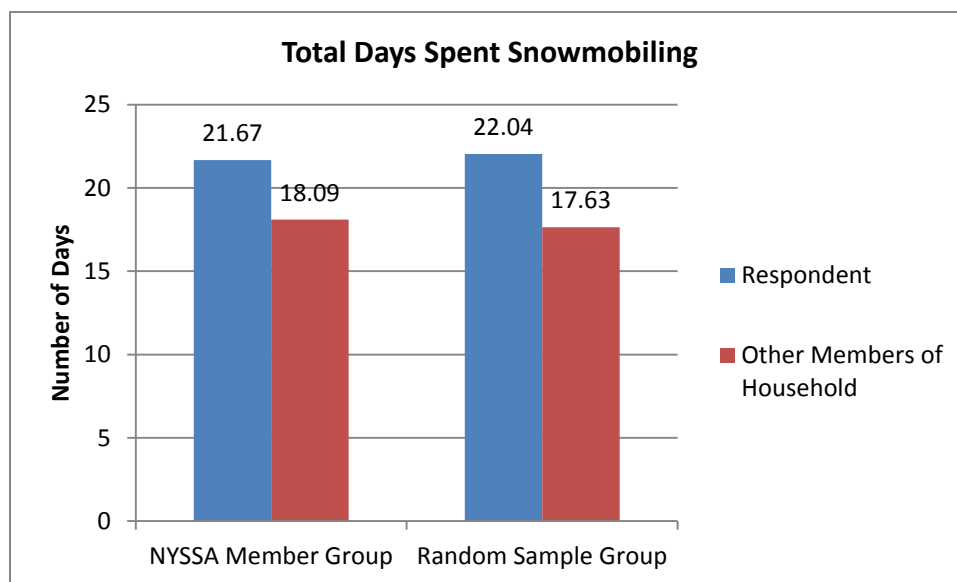


Ninety-five percent (95%) of the second homes are located in New York State. The largest number of second homes used primarily for snowmobiling are located in Lewis County (15.9%), followed by Hamilton County (10.6%), Herkimer County (9.2%), Oswego County (6.4%), St. Lawrence County (5.9%), Oneida County (5.7%), and Warren County (5.3%). The largest number of second homes located out of state is in Pennsylvania.

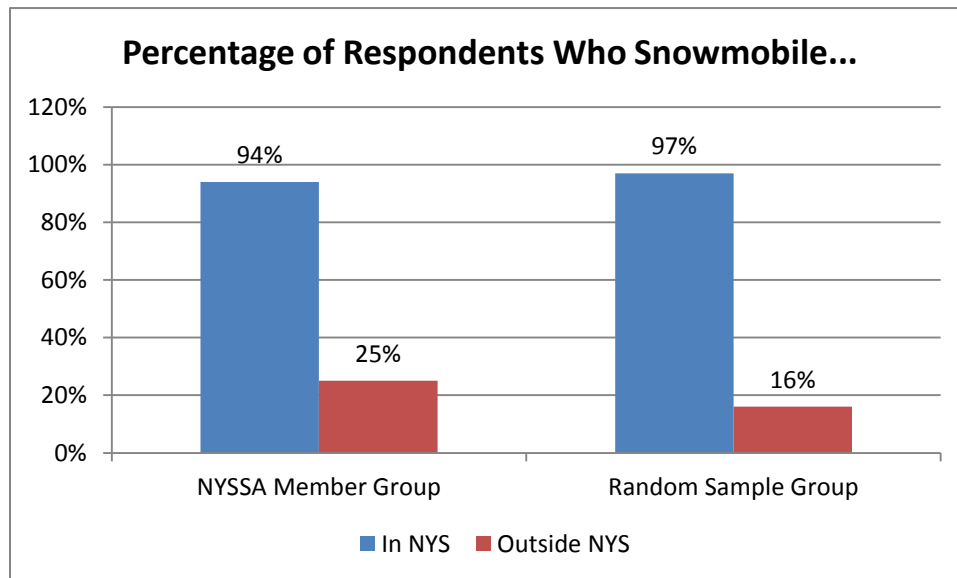
Total Days Spent Snowmobiling

The average number of days spent snowmobiling during the 2010-11 season was, approximately, twenty-two days for the respondents from both survey groups. In addition, the average number of days spent snowmobiling by other members of the respondents' household was eighteen days.

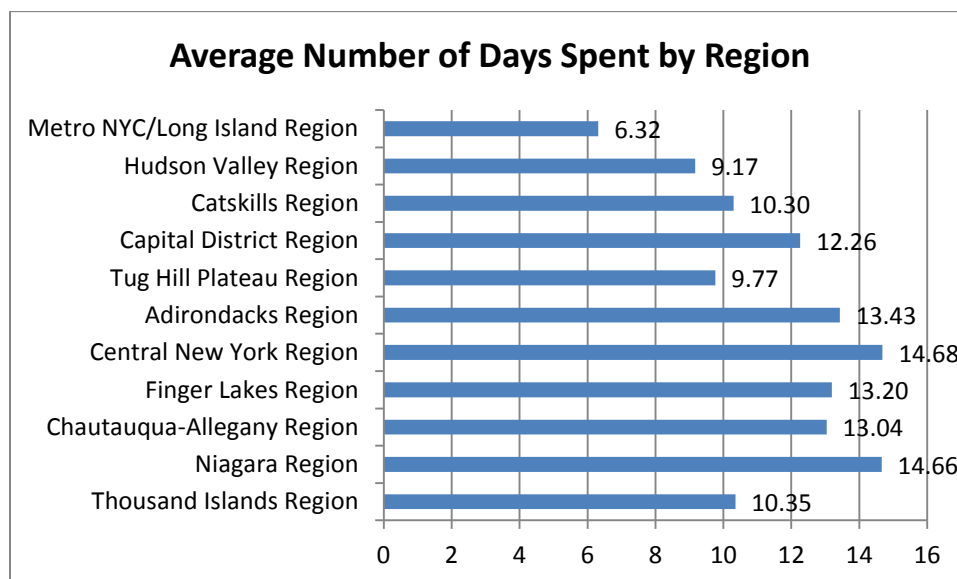
It can be estimated that the total statewide number of days snowmobiling is 1,980,000 utilizing the responses provided by the random sample group and multiplying by 90,000, the number of households in the state with registered snowmobiles. In addition, as was noted in the earlier discussion, 1.69 additional members of the random sample respondents' household snowmobile. Estimating the total statewide number of days spent snowmobiling by the 90,000 households in New York State, additional family members account for up to 2,680,000 days. The actual number of days spent snowmobiling by all members of the 90,000 households in New York State is a range, from 1.9 million days at the low end to 4.66 million days at the upper end of these estimates.



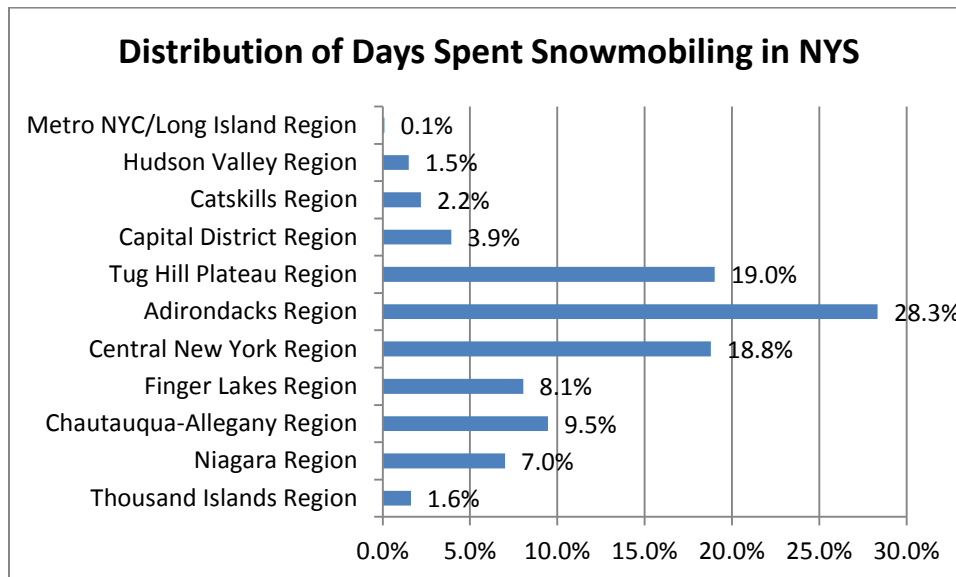
Most of the respondents from both survey groups (over 90%) reported that they snowmobile in New York State. Approximately twenty-five percent (25%) of the NYSSA Member group and sixteen percent (16%) of the random sample group reported that they snowmobile outside of New York State.



The total number of days spent snowmobiling as reported by 5,916 respondents was 123,373. The highest average number of days spent snowmobiling by an individual was in the Central New York region, followed by the Niagara region. The following graph shows the average number of days spent snowmobiling in a region by an individual.

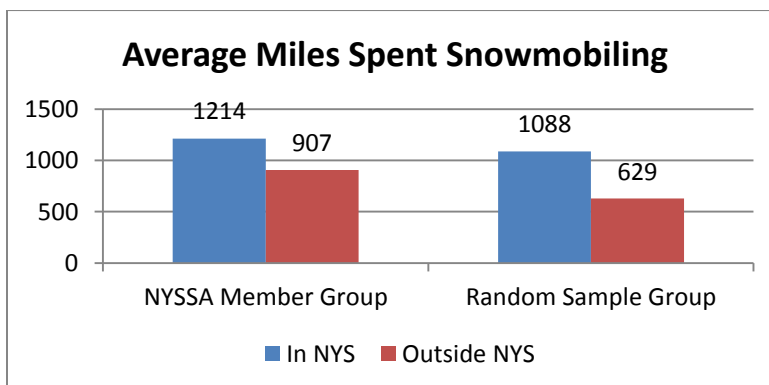


It is possible to estimate where the most snowmobiling is taking place. As can be seen on the chart below, the largest percentage of the days spent snowmobiling was in the Adirondack region, followed by the Tug Hill Plateau region and the Central New York region. Even though these regions may not have had the highest individual average number of days snowmobiling, the percentages are larger due to the higher number of individuals snowmobiling in those regions.

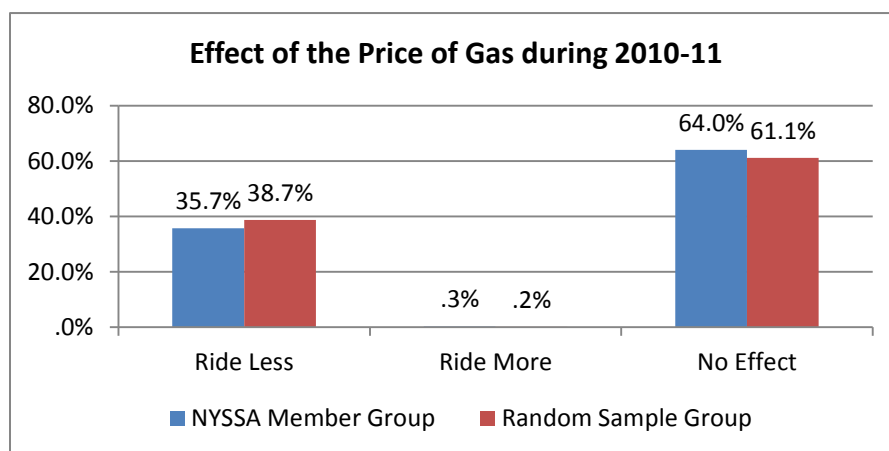


On average, the NYSSA member group of snowmobilers rode 125 miles further in New York State than the random sample group. The most frequently (mode) reported mileage by both groups of respondents was 1,000 miles during the 2010-11 season. Once again utilizing the random sample group it is reasonable to presume that total miles traveled during the 2010-11 season was between 90 million (# of households times 1000 and 135 Million miles (number of registered sleds times 1000). Such an estimate should be considered conservative considering that average miles traveled was higher than the multiplier used here.

Of those respondents who reported that they snowmobile outside of New York State, both groups reported that they rode less than in New York State, although the NYSSA member group rode over 275 miles further, on average, than the random sample group. The most frequently (mode) reported mileage by the NYSSA member group of respondents was 1,000 miles as compared with 500 miles by the random sample group of respondents during the 2010-11 season.



Over sixty percent of the respondents in both groups reported that the price of gas during 2010-11 had no effect on the amount of time spent snowmobile riding. Three percent more (38.7% compared with 35.7%) of the random sample group reported that they rode less due to the price of gas.



The average annual household expenditure for snowmobile related activities in New York State was very similar for both groups of respondents, although the individual categories had some variations. When calculating the economic impact of these expenditures, only the random sample group's data was used and that data was weighted to account for oversampling. Those averages differed slightly from the amounts below.

Category of Expenditure	NYSSA Member Group	Random Sample Group
Club Dues and Fees*	\$30.00	\$30.00
Club Donations	\$128.23	\$102.38
Snowmobile Rentals in NYS	\$575.94	\$666.18
Insurance	\$273.97	\$258.27
Highway Tolls	\$113.87	\$105.08
Trailer Expenses (purchase, maintenance, etc.)	\$2,715.57	\$2,845.07
Maintenance, Parts & Supplies for Transport Vehicle	\$1,433.96	\$1,377.51
Gasoline, Oil & Supplies for Snowmobile in NYS	\$830.13	\$715.87
Parts, Service & Repairs for Snowmobile in NYS	\$562.84	\$547.41
Clothing & Accessories in NYS	\$462.16	\$434.68
Overnight Trips in Hotels/Motels in NYS	\$630.73	\$704.96
Meals in NYS	\$440.37	\$388.67

*The median figure is used for this category instead of the average expenditure.

Approximately 40% of the respondents reported that they took an overnight snowmobiling trip during 2010-11. The average number of nights spent on overnight trips was seven (7) with an

average of five (5) nights spent in hotels/motels.

It is possible to calculate an average expenditure per day based on the information provided in the table above. On an average snowmobile outing, there are four likely categories of expenditure. They are gasoline, oil and supplies; parts, service and repairs; overnight trips in hotels/motels; and meals. As was noted on page 11 above, the average number of days spent snowmobiling by both groups was, approximately, twenty-two (22). The table below illustrates the calculation for the average expenditure per day for each of the groups responding to this survey.

Category of Expenditure	NYSSA Member Group	Random Sample Group
Gasoline, Oil & Supplies for Snowmobile in NYS	\$830.13	\$715.87
Parts, Service & Repairs for Snowmobile in NYS	\$562.84	\$547.41
Overnight Trips in Hotels/Motels in NYS	\$630.73	\$704.96
Meals in NYS	\$440.37	\$388.67
Total	\$2,464.07	\$2,356.91
Average Days Spent Snowmobiling	21.67	22.04
Average Expenditure Per Day	\$113.71	\$106.94

The average annual household expenditure for several snowmobile related activities outside New York State differed by, approximately, \$470 with higher expenses reported by the NYSSA Member group as noted below.

Category of Expenditure	NYSSA Member Group	Random Sample Group
Snowmobile Rentals outside NYS	\$809.38	\$725.00
Gasoline, Oil & Supplies for Snowmobile	\$570.31	\$354.04
Parts, Service & Repairs for Snowmobile	\$517.24	\$472.84
Clothing & Accessories	\$391.68	\$428.70
Overnight Trips in Hotels/Motels	\$887.74	\$760.87
Meals	\$384.94	\$350.16
Total	\$3,561.29	\$3,091.61

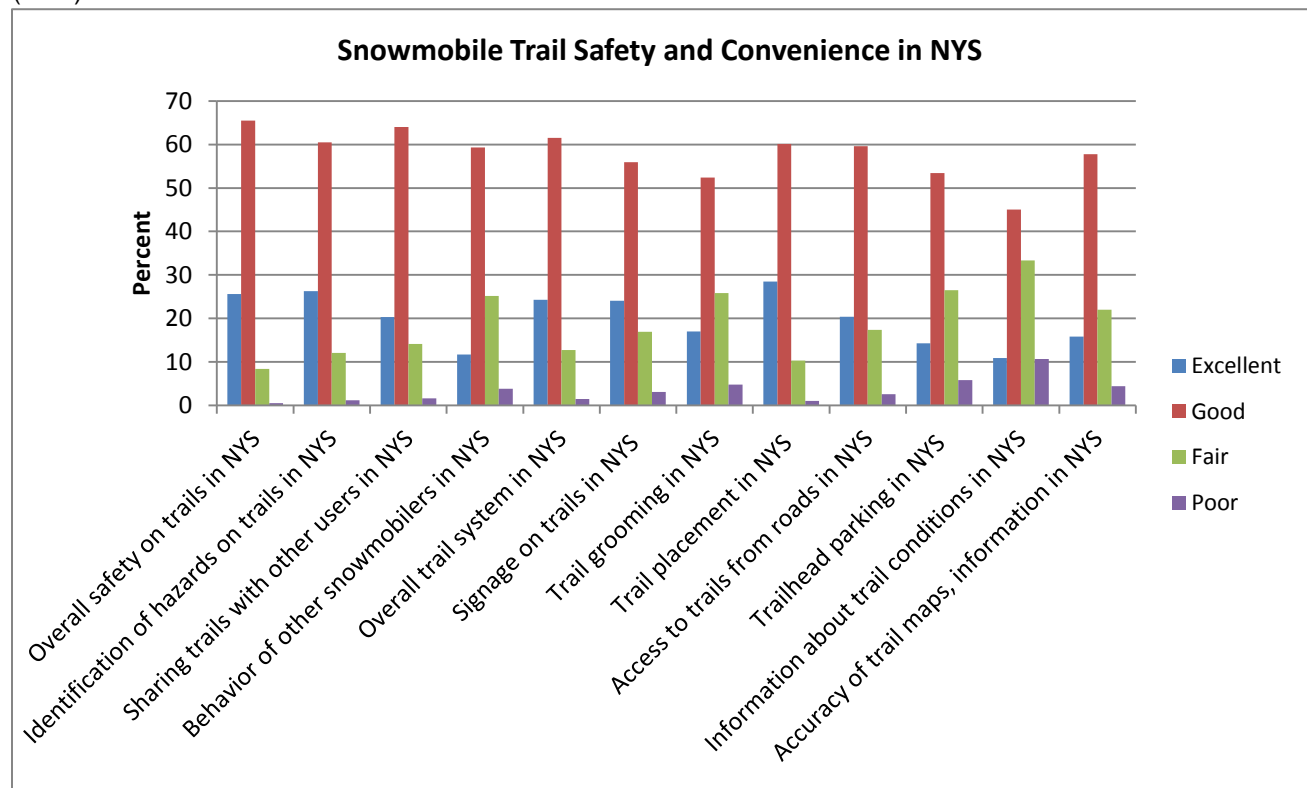
Part III: Safety, Convenience and Support Services

Of twelve measures regarding safety and convenience on New York State trails, respondents reported highest percentages of satisfaction with Overall Safety on Trails (over 90%), Trail Placement (over 88%) and Identification of Hazards on Trails (over 86%). Lowest percentages of satisfaction were with Information about Trail Conditions (approximately 56%) and Trailhead Parking (approximately 68%).

Ratings of Trail Safety and Convenience (Percentages)

	Excellent	Good	Fair	Poor
Overall safety on trails in NYS	25.6	65.5	8.4	0.5
Identification of hazards on trails in NYS	26.3	60.5	12.1	1.2
Sharing trails with other users in NYS	20.3	64.0	14.1	1.6
Behavior of other snowmobilers in NYS	11.7	59.3	25.2	3.8
Overall trail system in NYS	24.3	61.5	12.7	1.5
Signage on trails in NYS	24.1	55.9	16.9	3.1
Trail grooming in NYS	17.0	52.4	25.8	4.8
Trail placement in NYS	28.5	60.1	10.3	1.0
Access to trails from roads in NYS	20.4	59.6	17.4	2.6
Trailhead parking in NYS	14.3	53.4	26.5	5.8
Information about trail conditions in NYS	10.9	45.0	33.3	10.7
Accuracy of trail maps, information in NYS	15.8	57.8	22.0	4.4

Pictured graphically, it is clear that most of the respondents rated the measures at least “Good” on the ratings scale. The only exception was “Information about trail conditions in NYS” with forty-five percent (45%).

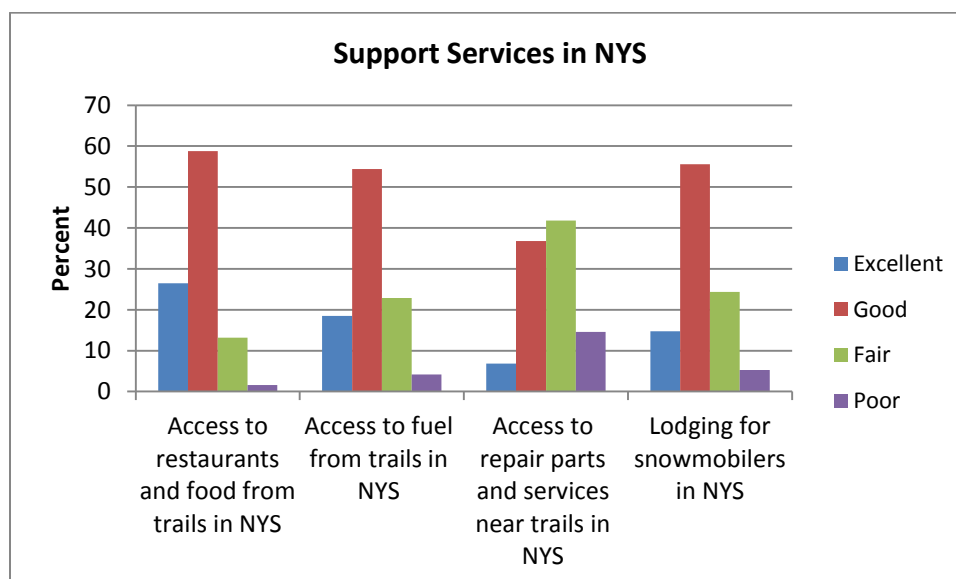


Snowmobile owners were asked to rate four services available from trails. Respondents had the greatest satisfaction with Access to Restaurants (approximately 85%) and Fuel (approximately 73%). The lowest satisfaction was with Lodging (approximately 70%) and Repair Parts and Services (approximately 44%).

Ratings of Support Services for Snowmobiling (Percentages)

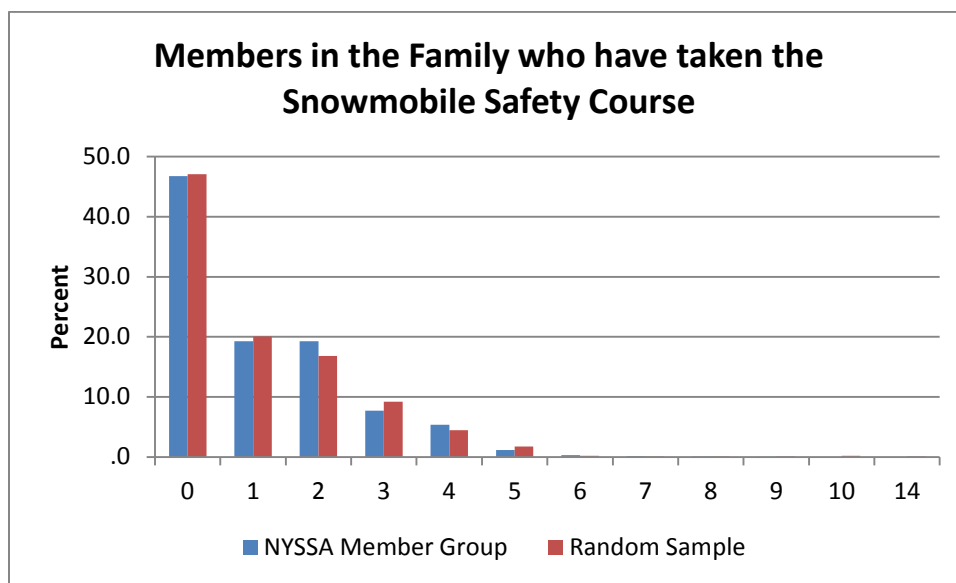
	Excellent	Good	Fair	Poor
Access to restaurants and food from trails in NYS	26.5	58.8	13.2	1.6
Access to fuel from trails in NYS	18.5	54.4	22.9	4.2
Access to repair parts and services near trails in NYS	6.8	36.8	41.8	14.6
Lodging for snowmobilers in NYS	14.7	55.6	24.4	5.3

Pictured graphically, it is clear that most of the respondents rated the measures at least “Good” on the ratings scale. The only exception was “Access to Repair Parts and Services near Trails in NYS” which was rated “Fair” or “Poor” by over fifty-six percent (56.4%).

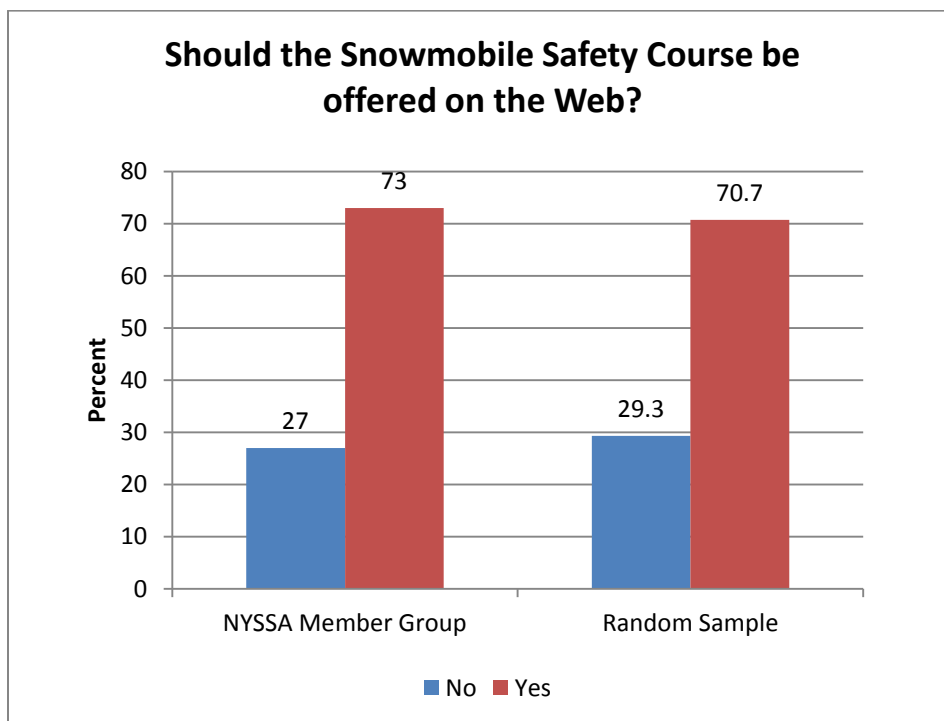


Part IV: Snowmobile Regulations and Trail Maintenance Fees

Approximately fifty-five percent of the respondents to the survey reported that at least one member in the family has taken the snowmobile safety course.



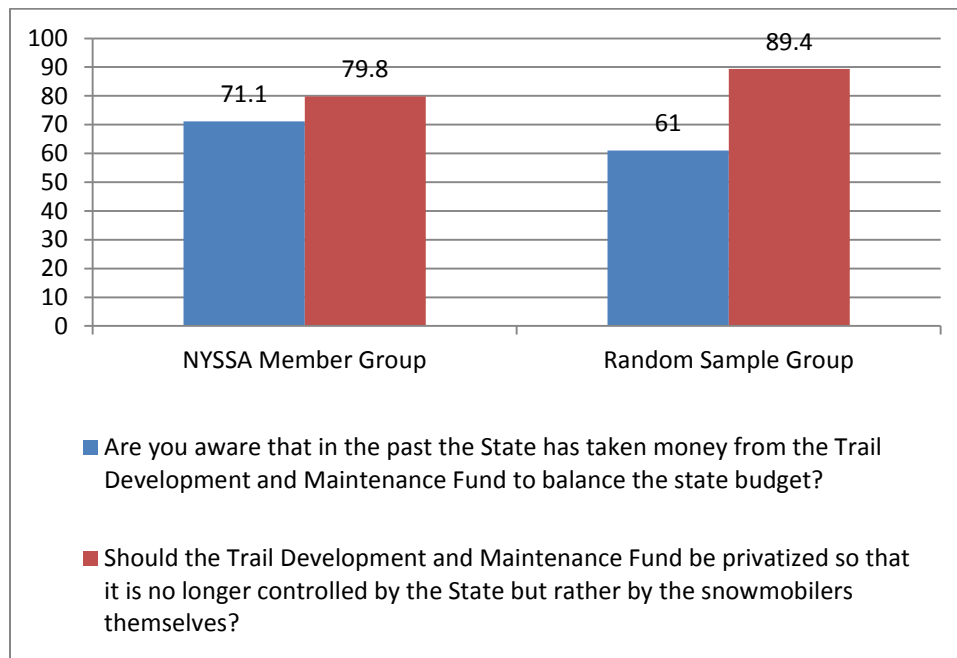
More than seventy percent of the respondents from both survey groups reported that they would like the snowmobile safety course to be available over the Internet.



The majority of snowmobile registration fees are deposited in the State Trail Development and Maintenance Fund (Trail Fund) and are used to support the public trail system that all NY snowmobilers may ride on. These funds support trail construction, maintenance, signing, grooming and law enforcement.

When asked if it was known that the State has taken money from the Trail Fund to balance the State budget, over seventy percent (71.1%) of the NYSSA Member group and sixty-one percent (61%) of the Random Sample group reported affirmatively.

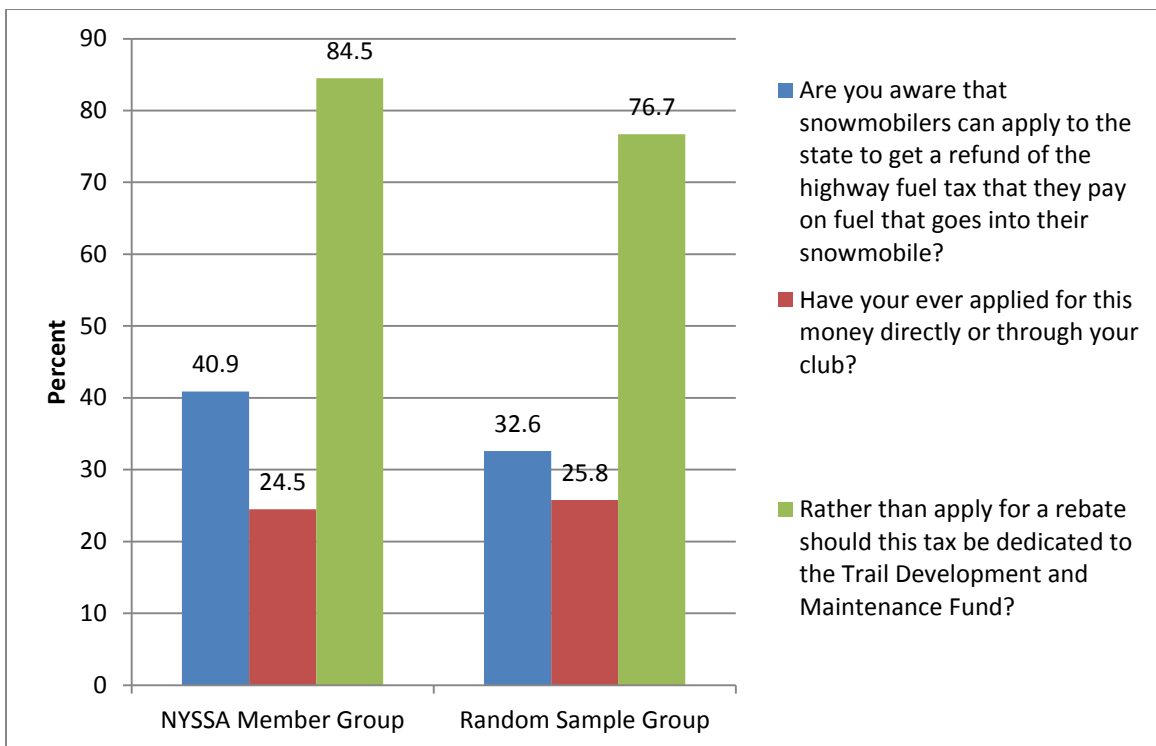
Almost eighty percent (79.8%) of the NYSSA Member Group and almost ninety percent (89.4%) of the Random Sample Group reported that they believed that the Trail Fund should be privatized so that it is controlled by the snowmobilers themselves and no longer controlled by the State.



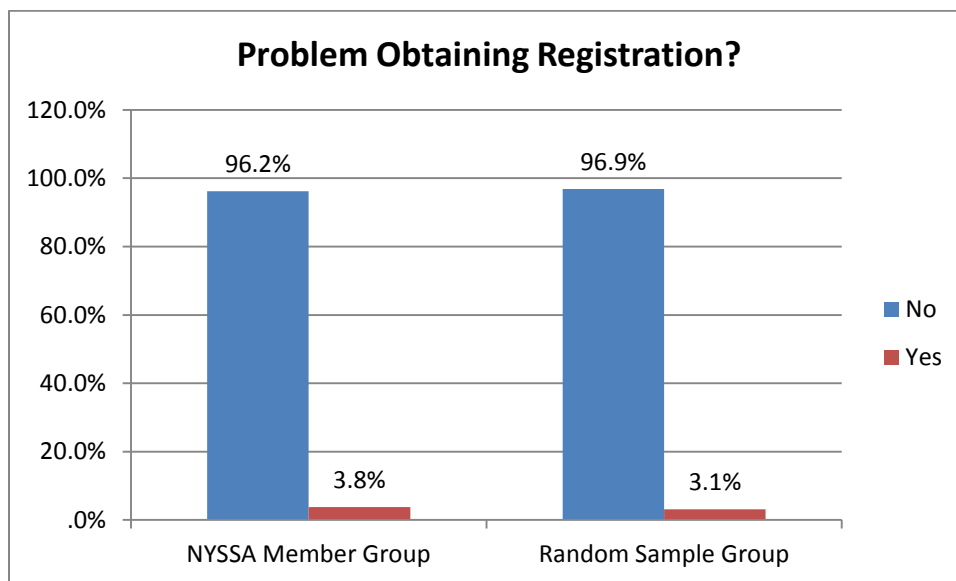
Approximately forty-one percent (40.9%) of the NYSSA Member group and, approximately, thirty-three percent (32.6%) of the random sample group reported that they were aware that snowmobilers can apply to the State to get a refund of the highway fuel tax that they pay on fuel for their snowmobile. Of the respondents who were aware of the fuel tax refund, approximately twenty-five percent of both groups reported that they have applied for this money directly or through their club.

Respondents were asked if, instead of applying for a rebate, the fuel tax refund should be dedicated to the Trail Development and Maintenance Fund. Approximately eighty-five percent (84.5%) of the NYSSA

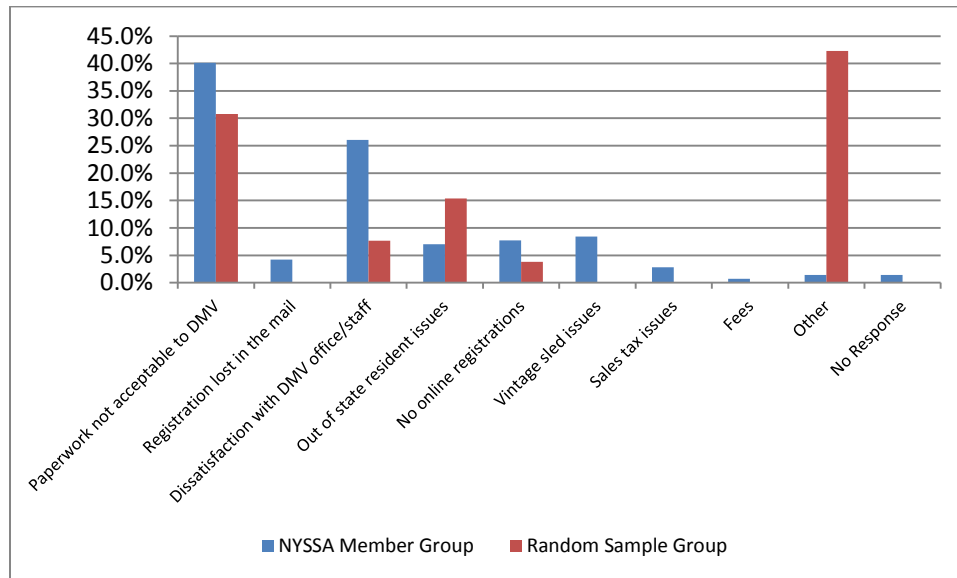
member group and, approximately, seventy-seven percent (76.7%) of the random sample group responded affirmatively.



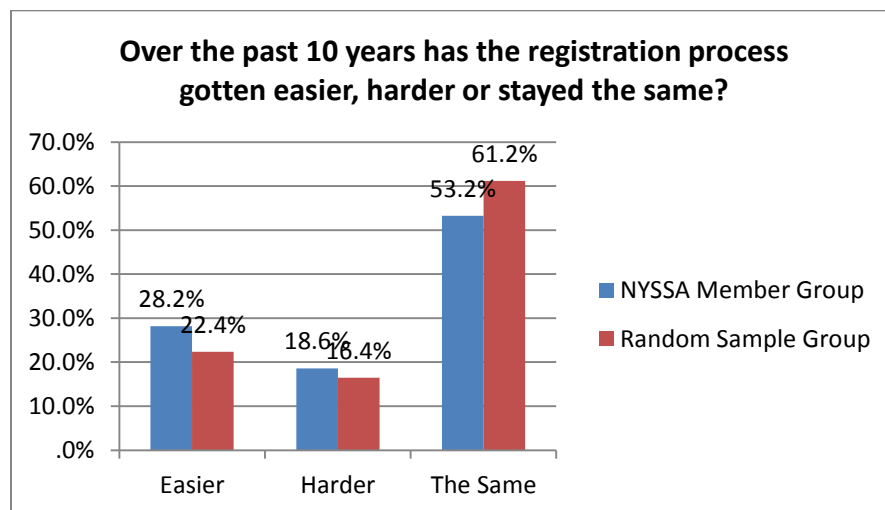
Over ninety-six percent of both groups reported no problems obtaining a snowmobile registration in New York State.



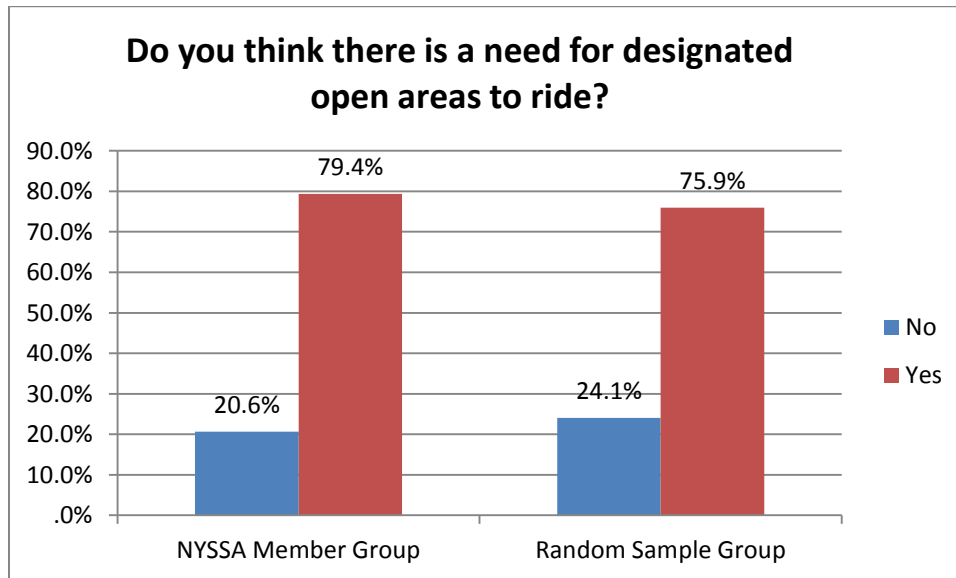
Of the two hundred respondents who indicated that they had had a problem obtaining a snowmobile registration, the largest percentage (30% - 40% of each group) indicated that the paperwork submitted was not acceptable to the Department of Motor Vehicles (DMV) when they attempted to register their snowmobile. Approximately forty-two percent (42.3%) of the responses for the random sample group reported very specific, individual responses which were placed in the “Other” category.



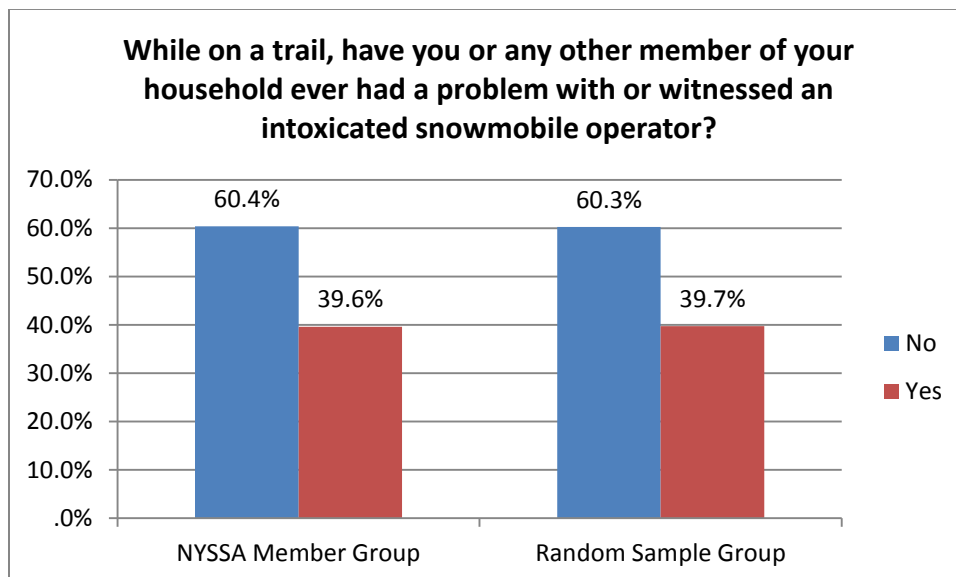
The majority of the respondents to this survey reported that the process for registering their snowmobile has stayed the same. Fewer than twenty percent in both groups reported that the process has gotten more difficult. (This survey was distributed prior to the New York State Department of Motor Vehicles policy change allowing out of state residents to register online if they have snowmobiles registered in their home state).



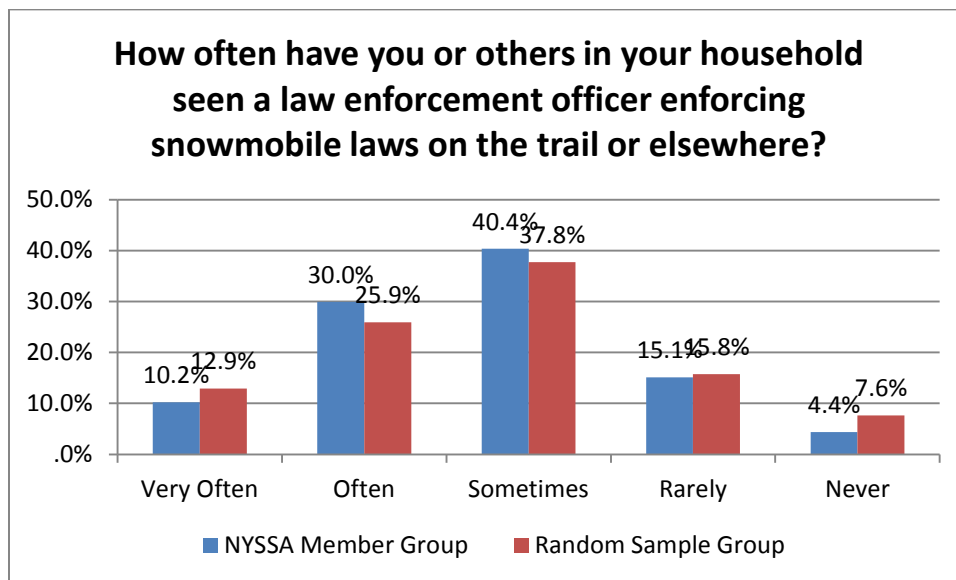
More than seventy-nine percent (79.4%) of the NYSSA Member group and almost seventy-six percent (75.9%) of the random sample group reported that they saw a need for more designated open areas to ride snowmobiles.



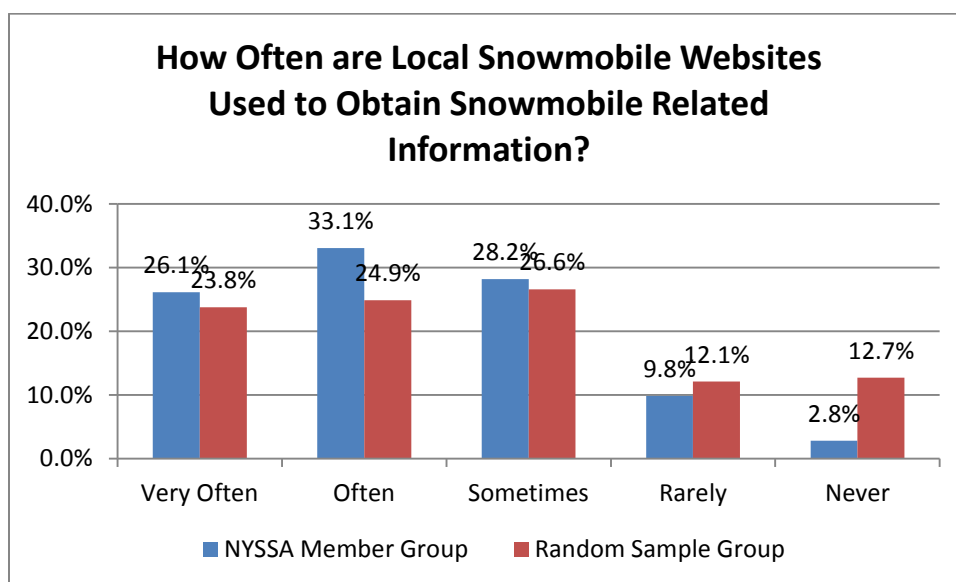
Over sixty percent from both survey groups reported that they have not ever had a problem with or witnessed an intoxicated snowmobile operator.



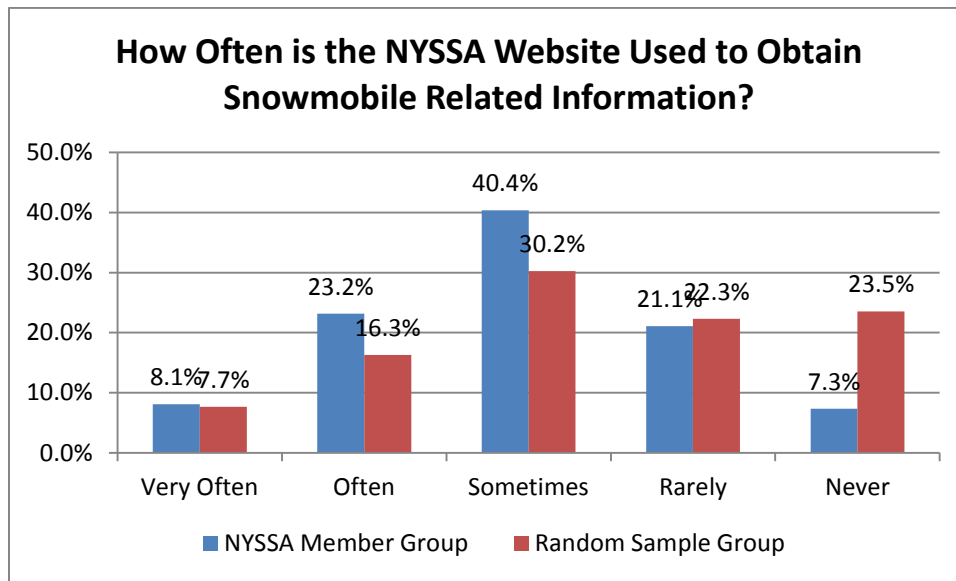
The most frequent response given by respondents of both groups regarding observing law enforcement on the trail or elsewhere is “Sometimes”. Approximately forty percent of both groups reported that response. Another thirty percent, slightly lower for the random sample group, responded that they “often” see law enforcement.



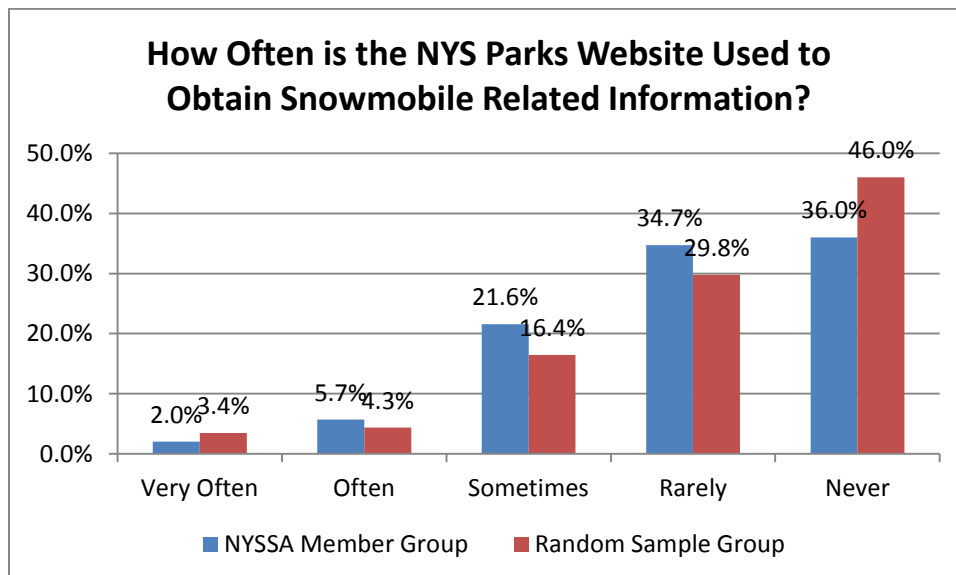
Respondents were asked several questions about their use of Internet technology as a means of obtaining snowmobile related information. Local snowmobile websites were most frequently cited as the source of snowmobile related information. Over eighty-seven percent (87.4%) of the NYSSA Member group of respondents and over seventy-five percent (75.2%) of the random sample group reported using those sites at least “Sometimes”.



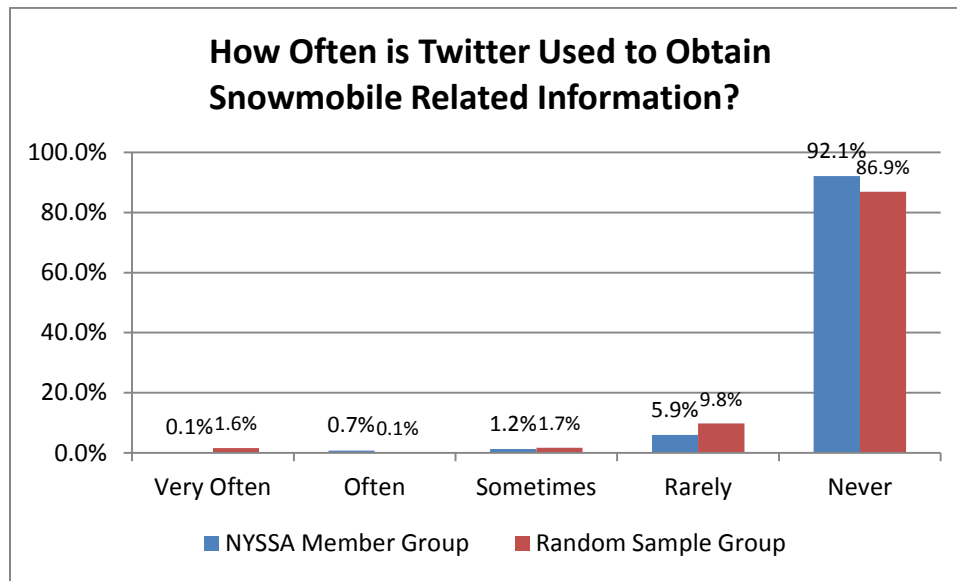
Over seventy-one percent (71.7%) of the NYSSA Member group and fifty-four percent (54.2%) of the random sample group of respondents reported that they have used the NYSSA website at least “Sometimes” for snowmobile related information.



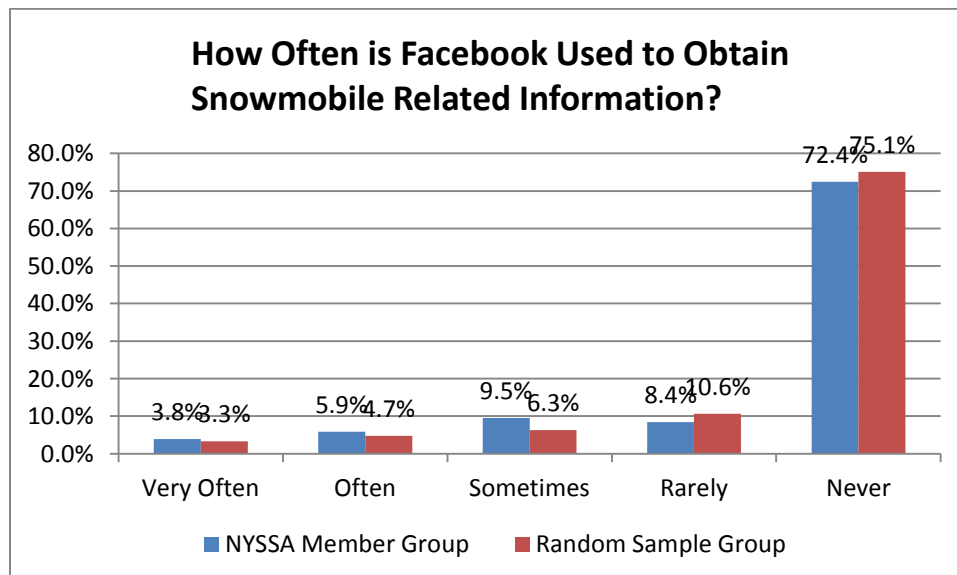
The New York State (NYS) Parks website is used at least “Sometimes” by over twenty-nine percent (29.3%) of the NYSSA member respondents and over twenty-four percent (24.2%) of the random sample respondents.



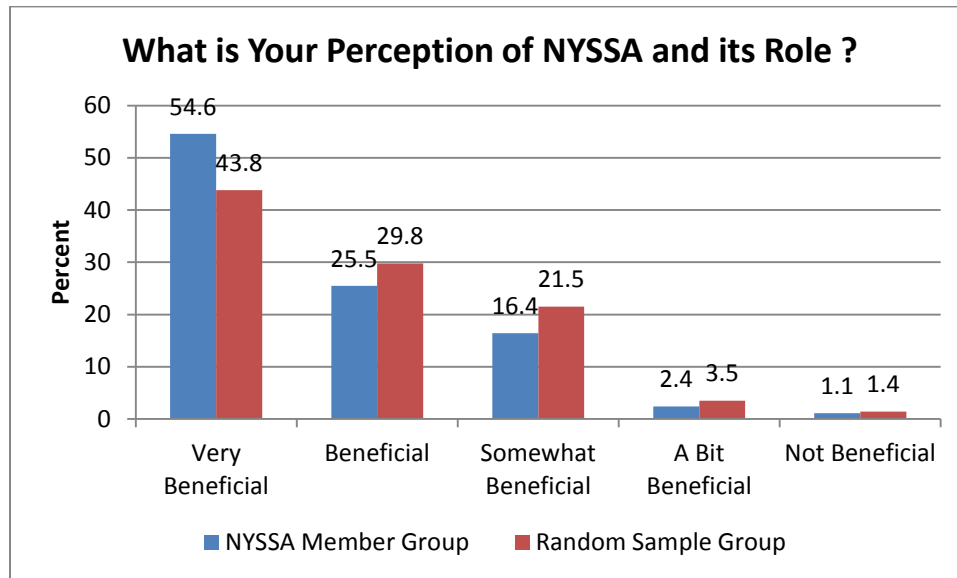
“Twitter” is used least frequently as reported by the respondents. Two percent (2%) of the NYSSA member group and just over three percent (3.3%) of the random sample group reported using “Twitter” at least “Sometimes”.



Approximately nineteen percent (19.2%) of the NYSSA member group of respondents and fourteen percent (14.3%) of the random sample group of respondents reported that they use “Facebook” at least “Sometimes” to obtain snowmobile related information.



Over ninety-six percent of both groups of respondents indicated they had heard about the New York State Snowmobile Association (NYSSA). Over half (54.6%) of the NYSSA Member group and almost forty-four percent (43.8%) of the random sample group reported that their perception of the organization and the role it plays is “very beneficial”. Just over one percent reported that their perception of NYSSA is “not beneficial”.



Part V: Promoting Snowmobiling in New York State

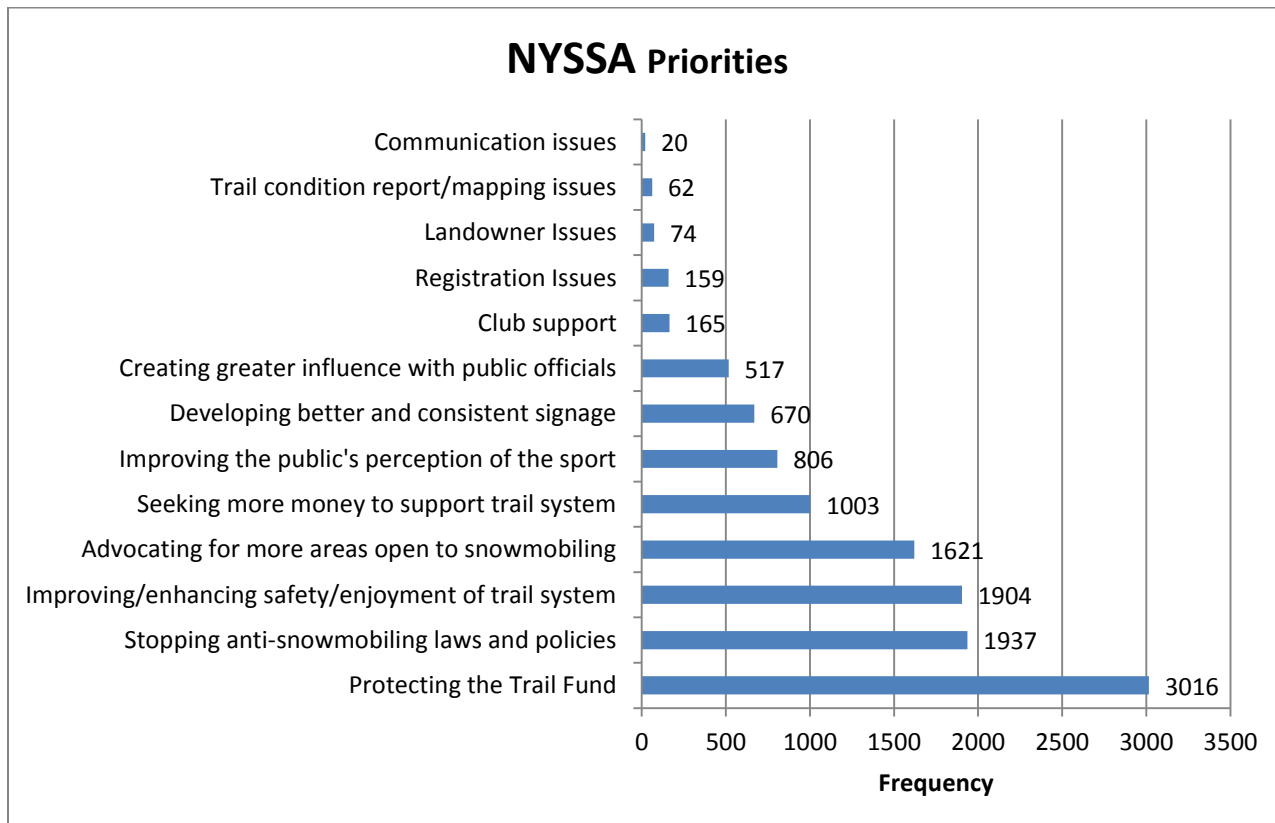
Snowmobile owners were asked to list, in rank order, the three most important things that they believed NYSSA should do to promote and improve snowmobiling in New York State. Eight of NYSSA’s current activities were provided as information for this question, listed in this order:

- Protecting the trail fund
- Developing better and consistent signage
- Improving and enhancing the safety and enjoyment of the trail system
- Improving the public’s perception of the sport
- Seeking more money to support the trail system
- Advocating for more areas open to snowmobiling
- Creating greater influence with public officials
- Stopping anti-snowmobiling laws and policies

Respondents were asked to specify their choices by writing anything they wished on each of three response lines.

Analysis of this question included two methods, counting the frequency of the response listed on any of the three lines, as well as rank ordering, based on which of the three lines the response appeared. With the exception of the ninth and tenth listed priorities, the order of the responses remained the same.

By far, the highest priority identified by the respondents was “protecting the trail fund”. With almost equal frequency, the second and third highest priorities were “stopping anti-snowmobiling laws and policies” and “improving and enhancing the safety and enjoyment of the trail system”.



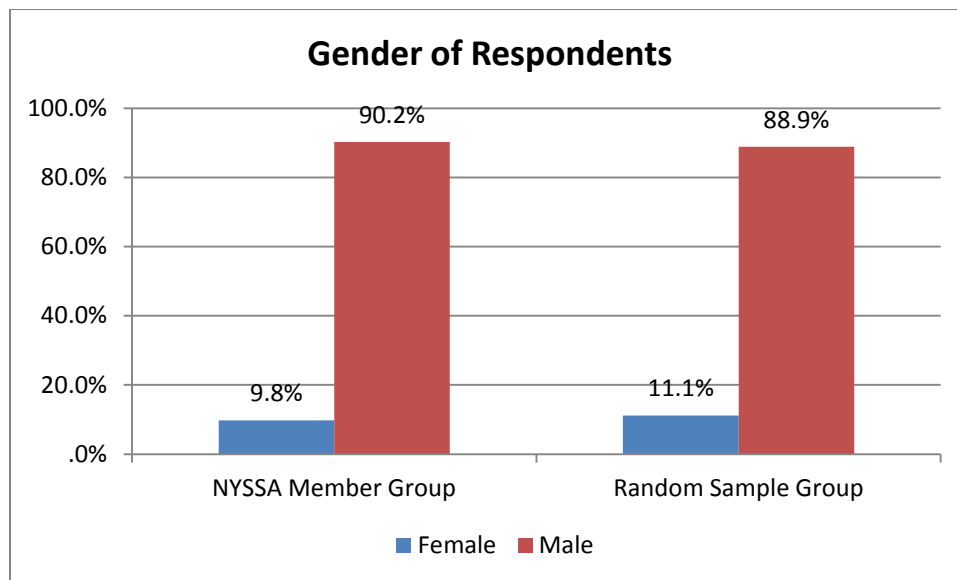
Part VI: General Information

The average age of the NYSSA member group of respondents was 47.68 years. The average age of the random sample group was slightly older at 48.42 years. The most frequent (mode) age of the respondents of both groups was 50 years old.

How old are you?		
	NYSSA Member Group	Random Sample Group
Count	4697	1203
Mean (Average)	47.68	48.42
Median	48	49

Mode	50	50
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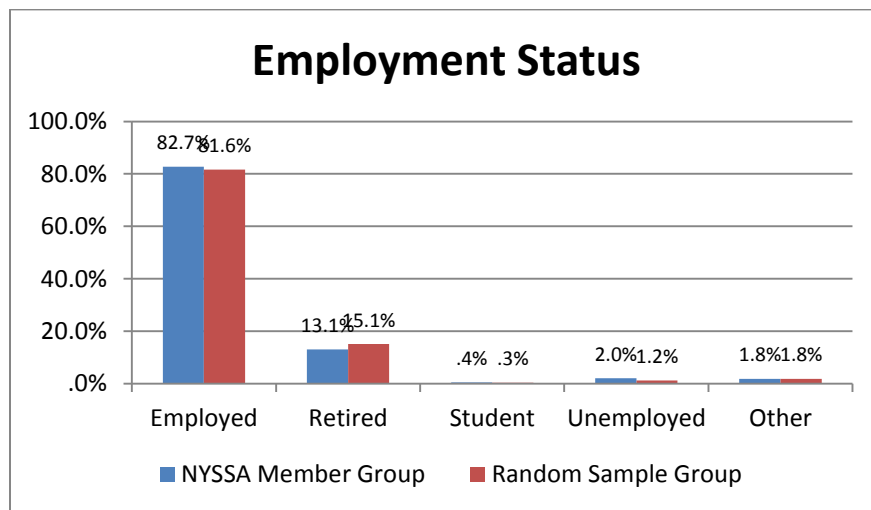
Approximately ninety percent of both survey groups responding to the survey were male, with female respondents accounting for slightly more (one percent) in the random sample group.



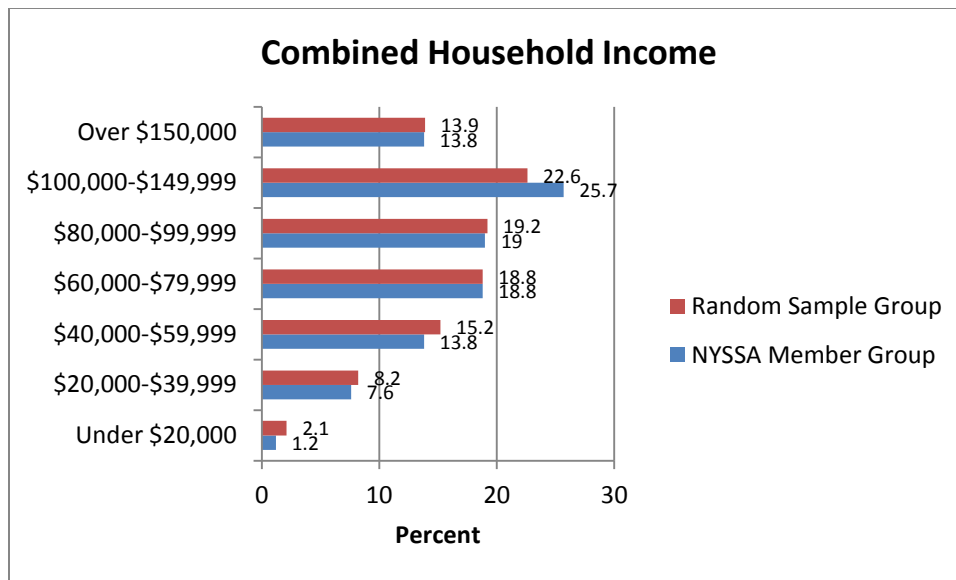
On average, respondents from both groups reported that there were slightly over three people in their household, with two as the most frequent (mode) number of household members.

How Many People Are in Your Household?		
	NYSSA Member Group	Random Sample Group
Number	4417	1185
Mean (Average)	3.10	3.11
Median	3	3
Mode	2	2

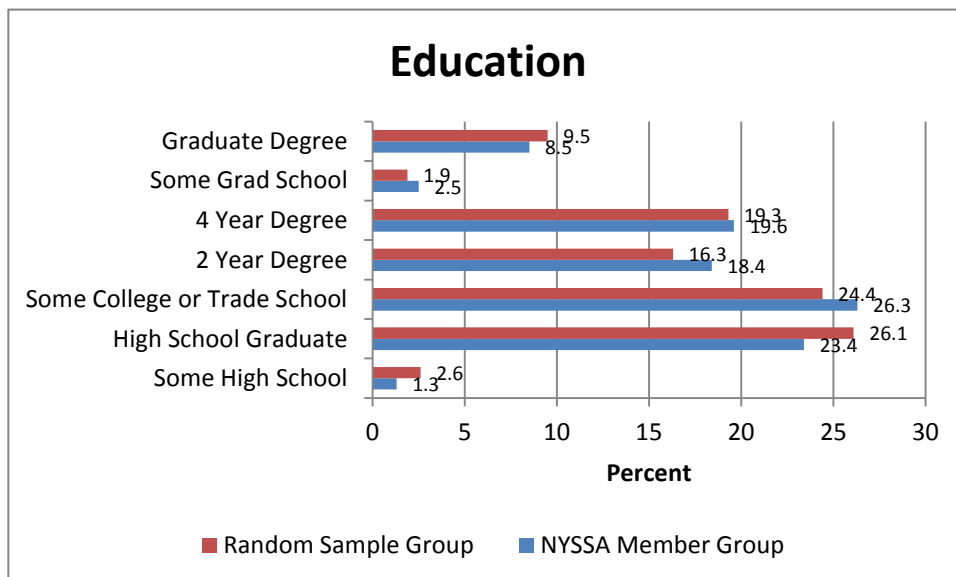
Approximately eighty-two percent (82%) of the respondents in each group were employed. Thirteen percent (13.1%) of the NYSSA Member group and fifteen percent (15.1%) of the random sample group reported that they were retired.



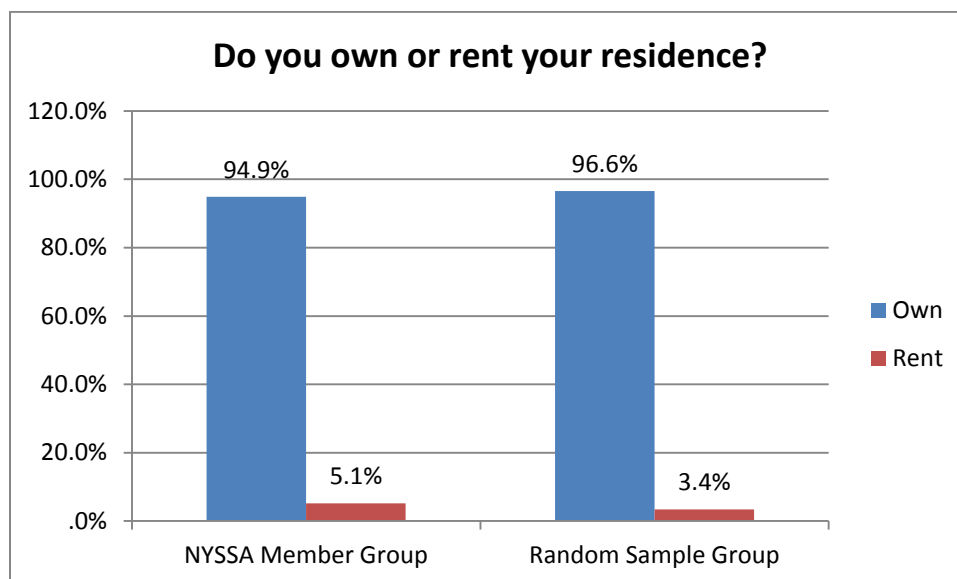
The largest percentage of both survey groups reported that their combined household income was between \$100,000 and \$150,000. More than 55% in each group (random sample – 55.7% and NYSSA Member group - 58.5%) reported combined household income greater than \$80,000.



The largest percentage of the random sample group (26.1%) reported that their highest level of education was high school. The NYSSA member group's highest percentage reported (26.3%) was some college or trade school. Over seventy percent of both groups (random sample – 71.4% and NYSSA Member group – 75.3%) reported at least some college or trade school education.



Almost ninety-five percent (94.9%) of the NYSSA member group and almost ninety-seven percent (96.6%) of the random sample group reported that they own their primary residence.



Economic Impact of the Snowmobile Industry in New York 2010-2011

Part A: Economic Impact of the Snowmobile Industry in New York State, 2010-2011

The total economic impact of the snowmobile industry in New York State can be calculated by estimating the expenditures of the statewide snowmobiling community from the data collected from the random sample group of snowmobile owners.

A random sample of 6,000 paper surveys was mailed to owners of snowmobiles registered in New York State. Total registration of snowmobiles was approximately 134,000 sleds, according to the New York State Department of Motor Vehicles for 2010-2011. The number of unduplicated addresses was just over 90,000. The random sample was drawn from the unduplicated list of addresses and included out of state registrants. Oversampling was done for several counties in the northern most counties of New York State to insure that enough responses would be received to be representative of those areas.

From the random sample group of respondents, 1,203 surveys were returned to PIAR or completed using the online version. This is a response rate of 20%. Due to the oversampling for the northern counties, results were then weighted based upon the size of the total pool for each county.

Estimates of the economic impact of snowmobilers in New York State were made by calculating the weighted ratio of respondents and the weighted total population for each question, multiplying by the total size of the pool (90,000) and multiplying, again, by the average expenditure of the snowmobilers from the random sample for each question. The formula used would look like this:

$$\frac{\text{Weighted Number of Respondents}}{\text{Weighted Total Population}} \times 90,000 \times \text{Average Expenditure}$$

Results for each expenditure category are reported below.

Category of Expenditure	Total Statewide Spending
Club Dues and Fees*	\$1,926,898
Club Donations	\$6,083,102
Snowmobile Purchases	\$70,017,456
Snowmobile Rentals in NYS	\$1,003,773
Insurance	\$21,655,849
Highway Tolls	\$3,962,936
Trailer Expenses (purchase, maintenance, etc.)**	\$131,164,419
Maintenance, Parts & Supplies for Transport Vehicle	\$28,801,754
Gasoline, Oil & Supplies for Snowmobile	\$56,164,471
Parts, Service & Repairs for Snowmobile	\$35,479,207
Clothing & Accessories	\$26,166,688
Overnight Trips in Hotels/Motels	\$16,199,075
Meals	\$28,475,726
Registration Fees***	\$6,900,000
Total	\$434,001,355

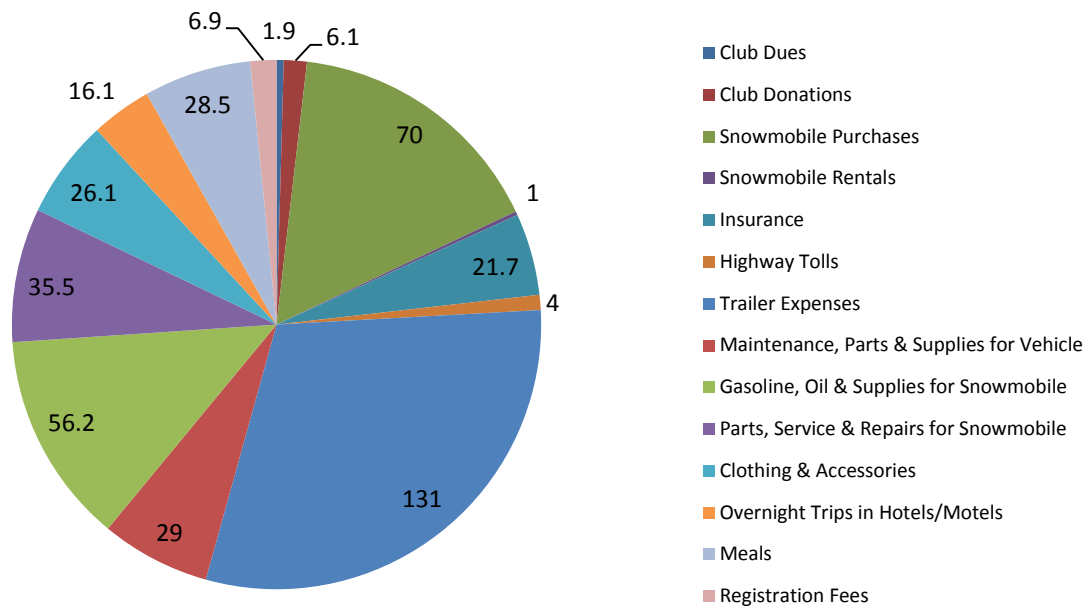
* Review of the club dues and fees category by PIAR and leadership of the NYSSA questioned the use of the average amount (\$48.37) in calculating the statewide impact. It was decided that the median amount (\$30) was a more accurate figure to use for this category. Use of the median amount reduces the statewide impact by approximately \$1.5 million dollars.

** The expenses for this category seem high. It is possible that respondents to this question included all consumable trailer expenses. The 1998 and 2003 surveys asked the question in the same manner which resulted in similarly high values. In addition, the question did not specifically state “this year’s expense” therefore this figure could represent multiple year expenses.

*** Registration expense was not asked of the snowmobile owners. This amount was calculated by multiplying the number of snowmobiles registered for 2010-2011 (134,000) by the known registration fee of \$45. In addition, approximately 16,000 sleds registered paid the additional \$55 fee for no club membership.

Graphically, this table can be illustrated using the pie chart below:

Economic Impact (in millions)



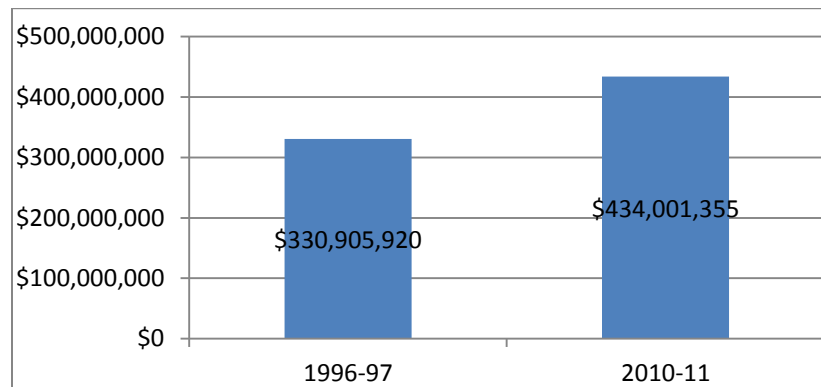
Total direct spending by snowmobile owners in New York State during 2010-2011 is estimated to be, approximately, \$434 million dollars. In addition to direct spending, indirect spending must be considered. Indirect spending occurs when the money spent by snowmobilers at snowmobile dealer establishments, motels, restaurants, etc. is re-circulated in the local economy.

Indirect spending is calculated by determining how much a dollar spent will result in additional spending. Similar studies, including the New York State Snowmobile Study conducted in 1996-1997, have determined that, for each dollar spent, one additional dollar of indirect spending will result.

	Total Statewide Revenue
Total Direct Spending	\$434 million
Total Indirect Spending (using economic multiplier of "1")	\$434 million
Total Economic Impact	\$868 million

It is likely that this is a conservative estimate of the New York State snowmobiler's spending during the 2010-2011 season due to careful economic assumptions and calculations. Nevertheless, the total economic impact of spending by the snowmobiling community in New York State is estimated at \$868 million dollars.

A similar study of the economic impact of the New York State snowmobile industry was conducted in 1998. A comparative chart, displayed below, illustrates how direct spending has increased over the past fifteen years. The dollar amounts are converted to 2010 dollars for comparative purposes.



The number of households increased from 59,000 in 1996-1997 to 90,000 (covering 134,000 sleds) in 2010-2011, which explains a large part of the increase in spending. In addition, increased prices for services explains another portion. However, there is no denying that the New York State snowmobiling industry has grown with over \$868 million dollars in direct and indirect spending, compared to \$661.8 million dollars in 1996-1997 (converted to 2010 dollars).

Part B: Economic Impact of the Snowmobile Industry outside New York State, 2010-2011

This year's survey asked several questions about the spending of respondents for goods and services outside of New York State. Weighting was used to compensate for the increased number of surveys in northern New York counties and the same process calculated the economic impact for each question. Results for each expenditure category are reported below.

Category of Expenditure	Total Statewide Spending
Snowmobile Rentals outside NYS	\$395,864
Gasoline, Oil & Supplies for Snowmobile	\$4,396,397
Parts, Service & Repairs for Snowmobile	\$2,944,667
Clothing & Accessories	\$3,848,187
Overnight Trips in Hotels/Motels	\$4,958,665
Meals	\$4,443,545
Total	\$20,987,325

The results above were compared with the results from the 1996-1997 study and compiled into the table below. It is interesting to note that, when the 1996-1997 expenditures were converted into 2010 dollars, spending in 1996-1997 outside of New York State was slightly higher. One explanation may be that, in 1996-1997, over thirty percent (30%) of the respondents reported snowmobiling outside New York State and, in 2010-2011, just sixteen percent (16%) of the random sample group of respondents reported that they traveled outside New York State to snowmobile. There are several explanations for fewer snowmobilers leaving New York State. One is the severe economic downturn which began in 2008. A second is that there were more opportunities to snowmobile in New York State in 2010 than in 1996-97. In 1996-97, there were, approximately, 8,000 miles of snowmobile trails available to the public. In 2010, trails maintained for snowmobiling in New York State had increased to 10,500 miles, a thirty percent (30%) increase. Trips to Canada may have been more prevalent in the late 90's when the exchange rate was very favorable to the U.S. dollar. Finally, as reported in this survey, at least 35% of respondents indicated that the price of fuel had a negative impact on how much they snowmobiled. The price of fuel may also be influencing their willingness to travel to other areas outside the state for snowmobiling. It is interesting to note that fuel is almost twice the cost in 2011 of what it was in 1997.

Category of Expenditure	Total Statewide Spending 1996-97 (in 2010 dollars)	Total Statewide Spending 2010-11
Snowmobile Rentals outside NYS	\$336,647	\$395,864
Gasoline, Oil & Supplies for Snowmobile	\$6,613,921	\$4,396,397
Parts, Service & Repairs for Snowmobile	\$2,467,645	\$2,944,667
Clothing & Accessories	\$2,467,275	\$3,848,187
Overnight Trips in Hotels/Motels	\$5,187,359	\$4,958,665
Meals	\$4,200,310	\$4,443,545
Total	\$21,273,157	\$20,987,325

