New York State Snowmobile Association (NYSSA)

2011-12 Snowmobile Owners Survey
Potsdam Institute for Applied Research

- Research Foundation of SUNY
- Located at SUNY Potsdam in St. Lawrence County just outside of the Adirondack Park
- Established 2002
- Director: Dr. J. Patrick Turbett
- Project Coordinator: Sandra Morris
Survey Method

- Randomly Sampled 6,000 of 90,000 Households with 134,000 Registered Sleds
- E-Mail Notification to 69,000 NYSSA Members
- 1203 Surveys Completed by Random Sample = 20% Return Rate
- 4713 NYSSA Members Completed Survey Using Online Survey = 7% Return Rate
Distribution of Sled Owners

2010 Registered Sled Owners

2011-12 Random Sample Returns

1 Dot = 25 Owners

1 Dot = 1 Survey
Previous Surveys

• 1996-1997 Survey – 445 Surveys Returned from Random Sample of 3,000 – 15% Response Rate

• 2003 Survey – 1,350 Surveys Returned from 5,000 Surveys = 27% Response Rate
Demographics

New York State Resident?

<table>
<thead>
<tr>
<th></th>
<th>NYSSA Member Group</th>
<th>Random Sample Group</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>No</strong></td>
<td>15.3</td>
<td>16.1</td>
</tr>
<tr>
<td><strong>Yes</strong></td>
<td>84.7</td>
<td>83.9</td>
</tr>
</tbody>
</table>
Demographics

Rural, Suburban, Urban?

<table>
<thead>
<tr>
<th>Location</th>
<th>NYSSA Member Group</th>
<th>Random Sample Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural</td>
<td>63.9</td>
<td>64.7</td>
</tr>
<tr>
<td>Suburban</td>
<td>31.9</td>
<td>31.2</td>
</tr>
<tr>
<td>Urban</td>
<td>4.2</td>
<td>4</td>
</tr>
</tbody>
</table>

Legend:
- NYSSA Member Group
- Random Sample Group
Demographics

Top Ten Counties of Residence

NYSSA Member Group  |  Random Sample Group
Demographics

Region of Residence

<table>
<thead>
<tr>
<th>Region of Residence</th>
<th>NYSSA Member Group</th>
<th>Random Sample Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital District</td>
<td>14</td>
<td>12.9</td>
</tr>
<tr>
<td>Western New York</td>
<td>12.5</td>
<td>11.9</td>
</tr>
<tr>
<td>Central New York</td>
<td>11.8</td>
<td>11.1</td>
</tr>
<tr>
<td>Finger Lakes</td>
<td>13.3</td>
<td>13</td>
</tr>
<tr>
<td>Hudson Valley</td>
<td>5.8</td>
<td>6.6</td>
</tr>
<tr>
<td>Long Island</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Mohawk Valley</td>
<td>10.3</td>
<td>10.7</td>
</tr>
<tr>
<td>North Country</td>
<td>7.5</td>
<td>11.2</td>
</tr>
<tr>
<td>New York City</td>
<td>1.2</td>
<td>0.3</td>
</tr>
<tr>
<td>Southern Tier</td>
<td>7</td>
<td>7.1</td>
</tr>
<tr>
<td>Out of State</td>
<td>14.4</td>
<td>15.1</td>
</tr>
<tr>
<td>Out of Country</td>
<td>0.3</td>
<td>0.1</td>
</tr>
</tbody>
</table>
Demographics

Employment

- Employed: 82.7% (NYSSA Member Group), 81.6% (Random Sample Group)
- Retired: 13.1% (NYSSA Member Group), 15.1% (Random Sample Group)
- Student: 0.4% (NYSSA Member Group), 0.3% (Random Sample Group)
- Unemployed: 2% (NYSSA Member Group), 1.2% (Random Sample Group)
- Other: 1.8% (NYSSA Member Group), 1.8% (Random Sample Group)
Demographics

Combined Income

- Over $150,000
  - Random Sample Group: 13.9%
  - NYSSA Member Group: 13.8%
- $100,000-$149,999
  - Random Sample Group: 19.2%
  - NYSSA Member Group: 19%
- $80,000-$99,999
  - Random Sample Group: 18.8%
  - NYSSA Member Group: 19%
- $60,000-$79,999
  - Random Sample Group: 18.8%
  - NYSSA Member Group: 15.2%
- $40,000-$59,999
  - Random Sample Group: 13.8%
  - NYSSA Member Group: 8.2%
- $20,000-$39,999
  - Random Sample Group: 7.6%
  - NYSSA Member Group: 2.1%
- Under $20,000
  - Random Sample Group: 2.1%
  - NYSSA Member Group: 1.2%
Demographics

Education

- Graduate Degree
  - Random Sample Group: 8.5%
  - NYSSA Member Group: 9.5%
- Some Grad School
  - Random Sample Group: 1.9%
  - NYSSA Member Group: 2.5%
- 4 Year Degree
  - Random Sample Group: 16.3%
  - NYSSA Member Group: 18.4%
- 2 Year Degree
  - Random Sample Group: 19.3%
  - NYSSA Member Group: 19.6%
- Some College or Trade School
  - Random Sample Group: 24.4%
  - NYSSA Member Group: 26.3%
- High School Graduate
  - Random Sample Group: 23.4%
  - NYSSA Member Group: 26.1%
- Some High School
  - Random Sample Group: 1.3%
  - NYSSA Member Group: 2.6%

Percent

Random Sample Group | NYSSA Member Group
Demographics

Property Ownership

- **Do you own your residence?**
  - NYSSA Member Group: 94.9%
  - Random Sample Group: 96.6%

- **Do you or others in your household own a second home, camp, or property that is used primarily for snowmobiling?**
  - NYSSA Member Group: 20.5%
  - Random Sample Group: 23.2%
Demographics

(Statewide Data Source: American Fact Finder – 2010 Census Data)

**Limited Mobility**

- NYSSA Member Group: 6.1
- Random Sample Group: 5.6
- Statewide 18-64: 4.3
- Statewide 65 & over: 23
CLUB ACTIVITIES
Club Activities
(over 90% of both groups reported club or NYSSA membership)
SNOWMOBILE
SLED DATA
Snowmobile Sled Data
(Information gathered for 12,772 sleds)

• Average number of snowmobiles owned: 2.42
  (Median: 2, Mode: 2)
• 46% purchased New, 54% purchased Used
• Overall Average Purchase Price - $4,955
• Average New Purchase Price - $9,359
• 91% Registered
• 90% Insured
• 86% are Two Stroke, 14% are Four Stroke
• Median model year is 2004, Mode is 2006
Model Year of Sleds Owned

(n=10,407)
Snowmobile Sled Data
( Information gathered for 12,772 sleds)

Brand of Snowmobile

<table>
<thead>
<tr>
<th>Brand of Snowmobile</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arctic Cat</td>
<td>24.4</td>
</tr>
<tr>
<td>Polaris</td>
<td>27.6</td>
</tr>
<tr>
<td>Ski-Doo</td>
<td>33.6</td>
</tr>
<tr>
<td>Yamaha</td>
<td>13.0</td>
</tr>
<tr>
<td>Other</td>
<td>1.4</td>
</tr>
</tbody>
</table>
Distribution of Days Snowmobiling in NYS
(total days reported: 123,373 from 5,916 respondents)
RATINGS
Ratings

Snowmobile Trail Safety and Convenience in NYS

Percent

- Excellent
- Good
- Fair
- Poor

<table>
<thead>
<tr>
<th>Rating</th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall safety on trails in NYS</td>
<td>65.5</td>
<td>0.5</td>
<td>8.4</td>
<td>12.1</td>
</tr>
<tr>
<td>Identification of hazards on trails in NYS</td>
<td>60.5</td>
<td>2.6</td>
<td>12.1</td>
<td>14.1</td>
</tr>
<tr>
<td>Sharing trails with other users in NYS</td>
<td>64</td>
<td>20.3</td>
<td>25.2</td>
<td>34.1</td>
</tr>
<tr>
<td>Overall trail system in NYS</td>
<td>59.3</td>
<td>11.7</td>
<td>3.8</td>
<td>1.6</td>
</tr>
<tr>
<td>Signage on trails in NYS</td>
<td>61.5</td>
<td>24.3</td>
<td>1.5</td>
<td>3.8</td>
</tr>
<tr>
<td>Trail grooming in NYS</td>
<td>55.9</td>
<td>16.9</td>
<td>3.1</td>
<td>1.5</td>
</tr>
<tr>
<td>Trail placement (scenic, natural) in NYS</td>
<td>52.4</td>
<td>17</td>
<td>4.8</td>
<td>3.1</td>
</tr>
<tr>
<td>Access to trails from roads in NYS</td>
<td>60.1</td>
<td>28.5</td>
<td>10.3</td>
<td>3.8</td>
</tr>
<tr>
<td>Trailhead parking in NYS</td>
<td>59.6</td>
<td>20.4</td>
<td>6.8</td>
<td>1.5</td>
</tr>
<tr>
<td>Information about trail conditions in NYS</td>
<td>53.4</td>
<td>17.4</td>
<td>10.7</td>
<td>5.8</td>
</tr>
<tr>
<td>Accuracy of trail maps, information in NYS</td>
<td>45</td>
<td>5.8</td>
<td>10.9</td>
<td>15.8</td>
</tr>
<tr>
<td>Poor rating</td>
<td>57.8</td>
<td>12.7</td>
<td>25.2</td>
<td>33.3</td>
</tr>
</tbody>
</table>
Ratings

Support Services in NYS

Access to restaurants and food from trails in NYS
Access to fuel from trails in NYS
Access to repair parts and services near trails in NYS
Lodging for snowmobilers in NYS

Percent

Excellent
Good
Fair
Poor
Trail Development and Maintenance Fund

Are you aware that in the past the State has taken money from the Trail Development and Maintenance Fund to balance the state budget?

Should the Trail Development and Maintenance Fund be privatized so that it is no longer controlled by the State but rather by the snowmobilers themselves?
Are you aware that snowmobilers can apply to the state to get a refund of the highway fuel tax that they pay on fuel that goes into their snowmobile?

Have you ever applied for this money directly or through your club?

Rather than apply for a rebate should this tax be dedicated to the Trail Development and Maintenance Fund?
ECONOMIC IMPACT
Direct Economic Impact (in millions)
Total = $428.5 million

- Club Dues: $131 million
- Club Donations: $29 million
- Snowmobile Purchases: $70 million
- Snowmobile Rentals: $21.7 million
- Insurance: $16 million
- Highway Tolls: $6.1 million
- Purchase & Maintenance of Trailers: $56 million
- Gasoline, Oil & Supplies for Snowmobile: $28.5 million
- Maintenance, Parts & Supplies for Vehicle: $13 million
- Parts, Service & Repairs for Snowmobile: $26 million
- Clothing & Accessories: $21.7 million
- Overnight Trips in Hotels/Motels: $1 million
- Meals: $4 million
Direct Economic Impact Comparison

(2010 dollars)

96-97: $163,876,853
2003: $256,909,994
2011: $428,500,000
# Statewide Economic Impact

<table>
<thead>
<tr>
<th></th>
<th>Total Statewide Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Direct Spending</td>
<td>$428.5 million</td>
</tr>
<tr>
<td>Total Indirect Spending</td>
<td>$428.5 million</td>
</tr>
<tr>
<td>(using economic multiplier of &quot;2&quot;)</td>
<td></td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>$857.0 million</td>
</tr>
</tbody>
</table>
Perception of NYSSA and Its Role

The chart shows the percentage of NYSSA member group and random sample group for different levels of perceived benefit:

- **Very Beneficial**: NYSSA Member Group = 54.6%, Random Sample Group = 43.8%
- **Beneficial**: NYSSA Member Group = 25.5%, Random Sample Group = 29.8%
- **Somewhat Beneficial**: NYSSA Member Group = 16.4%, Random Sample Group = 21.5%
- **A Bit Beneficial**: NYSSA Member Group = 2.4%, Random Sample Group = 3.5%
- **Not Beneficial**: NYSSA Member Group = 1.1%, Random Sample Group = 1.4%
QUESTIONS?
THANK YOU FOR BEING HERE TODAY!