

2003 Snowmobile Owners Survey



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The Department of Motor Vehicles provided the Office of Parks, Recreation and Historic Preservation with a complete listing of the owners of snowmobiles registered in New York State. This included 166,000 individuals, both New York residents and out-of-state owners. From this list 5,000 names were selected to receive a survey form. This survey was very well received with approximately 1,361 forms returned to the Office of Parks, Recreation and Historic Preservation. This is a response rate of 27%, quite a bit more than usual for this type of survey. Some of the findings are listed below:

- From the surveys collected, information was compiled on 1,361 households. 3,911 individuals and 3,200 snowmobiles.
- The average snowmobiler is 35.2 years old. A 1998 study indicated that 11% of all snowmobilers were women. The figure in the current survey is 39%.
- The average snowmobile owning household has an income of \$69,500 and owns 2.3 snowmobiles. The vast majority (92%) own their own homes.
- The average price paid for a snowmobile in 2003 was just under \$7,000.
- In 55% of the households, at least one family member belongs to a snowmobile club.
- Of the households surveyed, 73.6% were familiar with the New York State Snowmobile Association (NYSSA). Of that group, 82% gave “Protect the interests of local clubs and trail systems” the highest rating “very important” when rating activities done by the NYSSA.
- More than half (51%) of snowmobiling families had taken an overnight trip for the purpose of snowmobiling during the 2002-03 winter season. Of these, the median amount spent for the season was \$400 for hotels within New York State and \$500 for hotels located out of state.
- Most snowmobile owners support raising registration fees if the funds are used to pay for the extension and maintenance of the state trail system.
- Slightly less than one-third (31%) of all snowmobilers have taken a safety course.

This report gives a preliminary look at the results of the 2003 Snowmobile Owner Survey. These results are subject to change as more thorough analyses are performed. Future analysis from this survey will include analysis broken down to the regional level, travel patterns of snowmobilers within and out of New York State and the economic impact and activity generated by the snowmobiling community within New York State..

The 2003 Snowmobile Owner survey was designed to gather information on the demographics and attitudes of individuals who own snowmobiles registered in New York State. This group includes a significant number of individuals who live outside New York State but who have registered their snowmobile with the State of New York. The survey is a follow-up to a survey previously done by the Medwin Rural Services Institute at the State University of New York at Potsdam in 1998. It was felt that a successor survey needed to be done because of the extensive growth of the activity. The purpose of the survey is to learn about snowmobiler demographics, attitudes towards their sport, type of equipment used; interest in snowmobile clubs and economic activity generated by the sport in New York State.

Survey design included input from the New York State Office of Parks, Recreation and Historic Preservation Planning Bureau and the New York State Snowmobile Association. A copy of the survey instrument is shown in Appendix A.

Snowmobile registrations are maintained by the New York State Department of Motor Vehicles. In the spring of 2003, a data file was obtained from that agency containing the following information: name; address; year make and model of the snowmobile; and engine size. This file contained information on the 166,000 snowmobiles registered in the State of New York. The decision was made that a mailing of 5,000 survey forms, given a response rate similar to the 1998 survey, would result in an adequate sample size to perform the desired analysis. From the original list of 166,000 registrations a subset of 5,000 individuals were selected. Commercial owners and duplicates (resulting from individuals owning more than one snowmobile) were eliminated from this group.

Survey forms were mailed to 5,000 registered snowmobile owners in July and August 2003. The response rate was greater than expected and approximately 1,350 usable survey forms were returned, about 27%. The data were electronically coded and are being analyzed. This report is a first, **preliminary** look at the results of this survey.

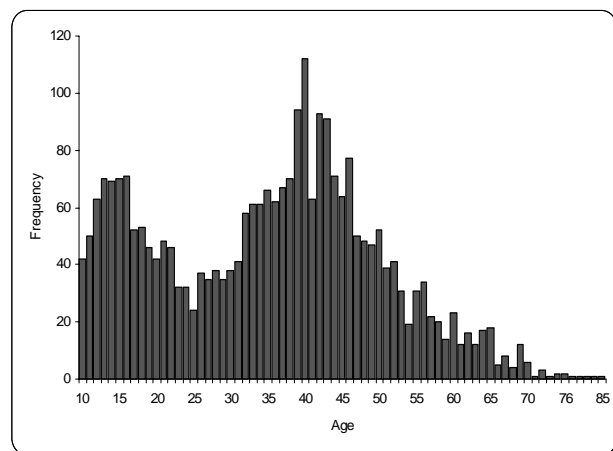


Snowmobile Participants

Surveys were returned by 1,363 households. Most of the returned surveys included information on more than one member of the household resulting in information on 3,911 individuals. Of these 2,739 were over age 10 (the legal minimum age to operate a snowmobile in New York) and had indicated that they had snowmobiled during the 2002-03 season.

Looking at these 2,739 individuals, 87.4% indicated that they were residents of New York State. This figure is basically unchanged since the 1998 survey which found 88.7% were NYS residents. Counties within New York State having a large number of respondents were Erie County (6.6%); Oneida 5.7%; Saint Lawrence 4.9%; Onondaga 4.5%; Monroe 4.3%; Saratoga 3.8%; Herkimer 3.3%; Oswego 3.1%; Madison 3.0%; and Chautauqua and Fulton counties both with 2.6%.

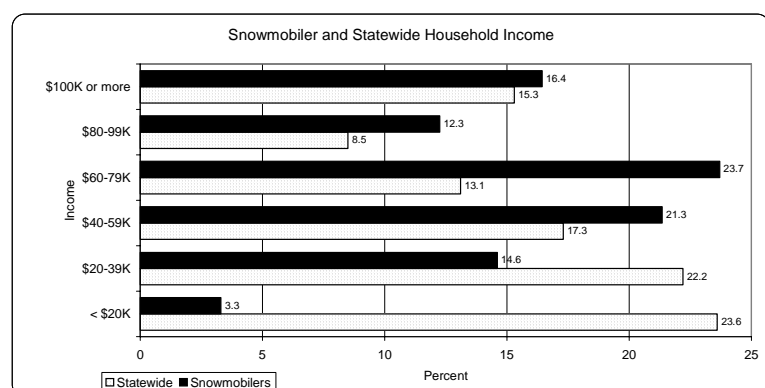
Ages of snowmobilers looked at in the graph to the right ranged from 10 up to 85. The average age is 35.2 years but what is interesting is the bimodal distribution. One possible cause of this may be the high cost of participating in this activity. Youngsters living at home may operate their parents snowmobiles. When they move out on their own they must establish themselves financially before they purchase the equipment needed. Also different interests at various points during the life cycle may cause differing levels of activity in snowmobiling. A further analysis of the data would prove interesting.



The 1998 survey reported that 89% of the snowmobilers in New York were male. This appears to have changed dramatically. Of the 2,739 individuals who reported snowmobiling in the 2002-03 season, 60.7% were male and 39.3% were female.

Of the 1,363 households responding to this survey, the largest group, 19.6% came from Central New York. (Appendix B shows the locations of the regions used in this report). This was followed by the Niagara Region, 15.0%, and the Capital-District, 11.7%. The least responses came from the Metropolitan New York City / Long Island region (1.9%) and the Catskill Park (1.0%).

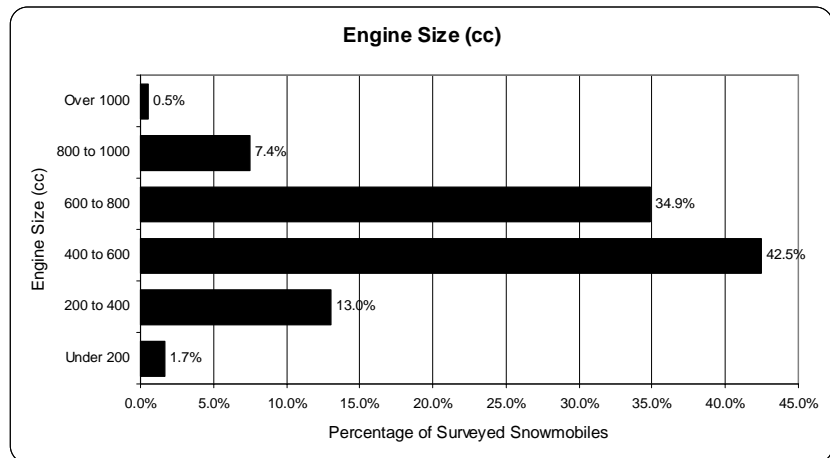
The largest number of responses came from households reporting income in the \$60,000 - \$79,999 range. The fewest responses came from those earning less than \$20,000 per year. The majority of people completing the survey form said that they were employed full-time (71%). Other categories included employed part-time(6.4%), self-employed(20.9%), etc.



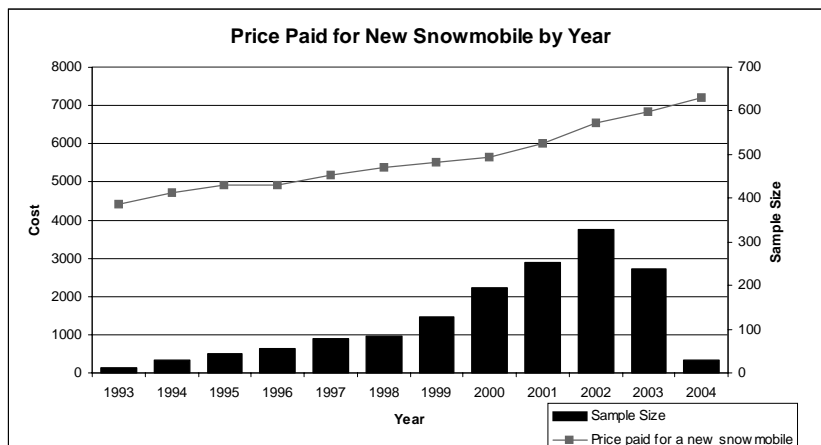
Each household was asked to provide information on each snowmobile it owned, up to a maximum of four. The questions asked were what year the snowmobile was purchased, the cost, whether the snowmobile was purchased new or used, and the engine size. If more than four snowmobiles were owned, a simple count of the total number of snowmobiles was also asked.



The households reported owning, on average 2.3 snowmobiles. There were very few instances of more than 4 snowmobiles owned by one household. Of the 3,200 snowmobiles for which data was received, 55.7% had been purchased new and the remainder, 44.3%, were purchased used. For all snowmobiles, regardless of the year purchased, the average price paid was \$4,413. The average price paid for a new snowmobile was \$5822 and a used snowmobile was \$2526. Of course, due to inflation and other factors, the average cost of a new snowmobile has risen over the years. The price of used snowmobiles would therefore also rise.



The most popular engine size reported was 600cc, followed by 500cc and then 700cc. In the survey, most snowmobiles had been purchased during the year 2002. Other data on equipment was also collected. Only 2.9% of the households reported renting a snowmobile during 2002-03. When asked if they purchased a snowmobile between April 1, 2002 and March 31, 2003, almost 45% of the households said yes and indicated a average expenditure of \$6,328 per household.



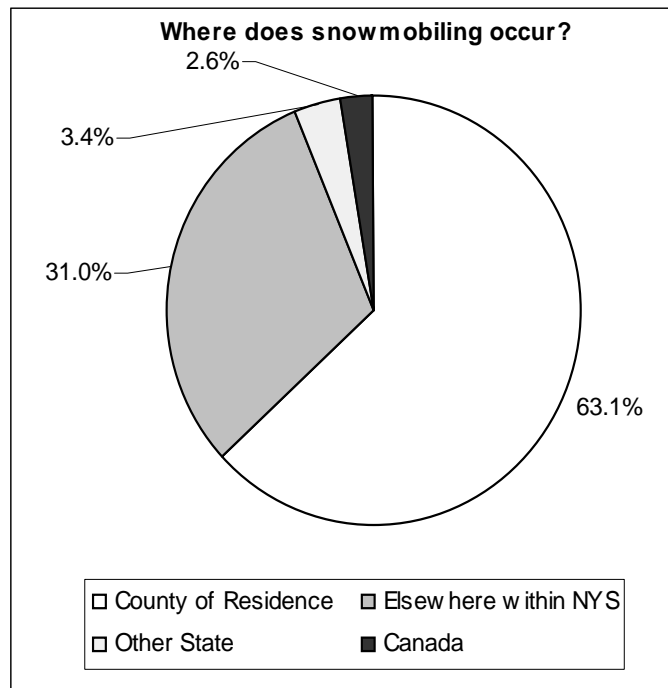
Modern Snowmobile

The purchase price of a new snowmobile has been steadily increasing.

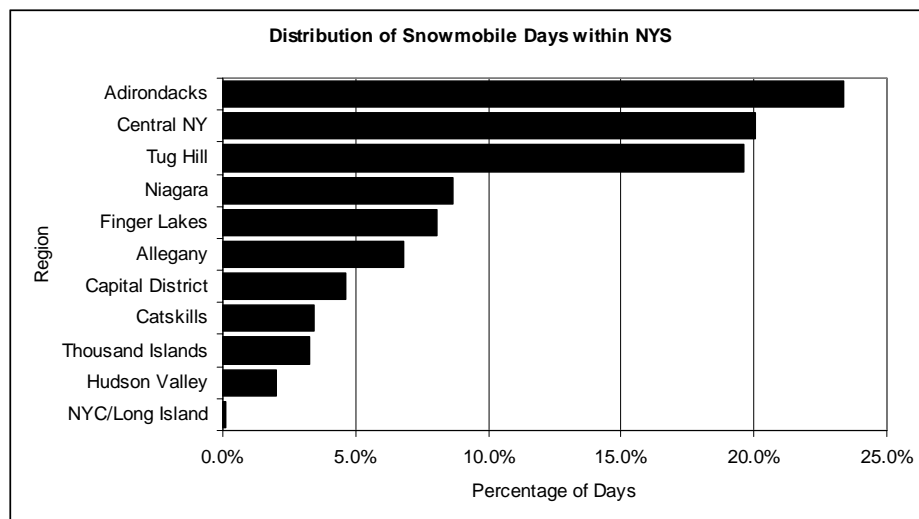
Travel Patterns of Snowmobilers

For many participants, snowmobiling is an activity that can take place in their backyards or on nearby trails, open fields and wooded areas. For others, particularly city residents, travel is an important part of the enjoyment of the sport.

The survey asked each household how many days each individual snowmobiled and where these snowmobile-days took place: within the county of residence; elsewhere in New York State, in another state or Canada. For the entire survey, there were over 68,000 days reported by 2,563 individuals, averaging 26 days per snowmobiler. The location reported for these days is shown in the pie chart to the right. Almost 2/3 of the reported days took place within the county of residence.



The person completing the survey form was also asked to indicate in which New York State region(s) he/she had snowmobiled. The days were totaled for each region and statewide and percentages were calculated. The results are shown in the chart below:



A slight majority (51%) indicated that they had gone on an overnight trip for the purpose of snowmobiling. There was considerable geographic variation in the response to this question. The residents of the Hudson Valley/NYC/Long Island areas more likely to travel overnight (almost two-thirds did) and the residents of the Thousand Islands and Tug Hill Plateau least likely to (about one-quarter did).

Snowmobiling is an activity that requires significant expenditures by its participants. The sled must be purchased, registered, insured and maintained. If the snowmobile is to be used at a significant distance from where it is kept, a trailer must be purchased and the owner must have access to a vehicle capable of transporting the trailer and snowmobile(s). Further, many people snowmobile as part of an overnight stay away from home - sometimes a weekend, sometimes longer. This can further assist in stimulating economy of the more rural areas of New York State. This is especially important in helping to maintain a economic stimulus in those areas of the state which might otherwise be fairly inactive during the winter.

The 2003 Snowmobile Owners Survey asked some detailed questions about the expenses incurred during the 2002-03 season. Some of these questions were asked of the household as a group while others were asked of each individual within the household. The responses will be looked at in greater depth in a future analysis, but some of the first findings are mentioned below:

Snowmobile Purchases: Of the 1,361 households responding to the survey, 554 indicated that they had purchased a total of 716 snowmobiles at a cost of approximately \$3.52 million for an average cost of about \$5,000 per vehicle. This figure includes purchases of both new and used snowmobiles.

Insurance: Insurance costs were reported by 93% of the households surveyed. The median cost of insurance per household was \$250.00 with the majority of responses falling between \$125 and \$400.

Trailer Expenses: The average cost given by the households who reported the trailer costs was just under \$1,300. The majority of the the annual costs reported were between \$150 and \$1,700. Results included those households who purchased a new or used trailer as well as those who were maintaining already-owned trailers.

Snowmobile clothing and accessories: The average cost reported was \$653. The majority of the cases fell in the range of \$230 to \$800. This figure includes money spent both in and out of New York State.

Hotel expenses: Approximately 51% of the households surveyed said that they had gone on an overnight trip for the purpose of snowmobiling during the 2002-03 season. The median amount spent at hotels within New York State was \$400 and out of state was \$500.

Each respondent was asked for additional information about snowmobiling, including club membership, his/her opinion on a number of issues and concerns about amenities that are available on trails, etc.

In 55% of the households surveyed, at least one person belonged to a snowmobile club and in one-third of the household surveyed, there was someone who belonged to the New York State Snowmobile Association. Each household was asked to rate ten activities of the NYSSA on a scale of 1(not important) to 5 (very important). Of these ten activities the three receiving the highest ratings (average rating shown at end of statement in parenthesis) were:

- (1) protecting the interests of local clubs and trail systems (4.70);
- (2) lobbying on legislative issues that affect snowmobiling (4.51);
- (3) promote snowmobile safety and safety education (4.42).

Respondents to the survey were also asked to rate items concerning safety on state designated snowmobile trails in New York State on an excellent to poor scale. All safety concerns received high ratings in the following order:

- (1) Overall safety on state trails;
- (2) Sharing trails with other users;
- (3) Identification of hazards on trails; and
- (4) Behavior of other users on state trails.

Another safety related question was whether the individual had taken a safety course. Of all the individuals questioned, 31.4% had taken one. Male respondents were slightly above the average with 37.1%; female snowmobilers had a 24.0% “yes” response.

Similarly, respondents were asked to evaluate support services on state designated trails in NY. The responses indicated that snowmobilers were most satisfied with the availability of food near trails, followed by lodging, gas and repairs in that order.

When asked if snowmobile registration fees should be increased the results were mixed. While more people said ‘yes’ than ‘no’ to whether fees should be increased to extend and improve the maintenance of state trails, the results were the opposite when asked if the state fees should be used for safety programs and trail signage.



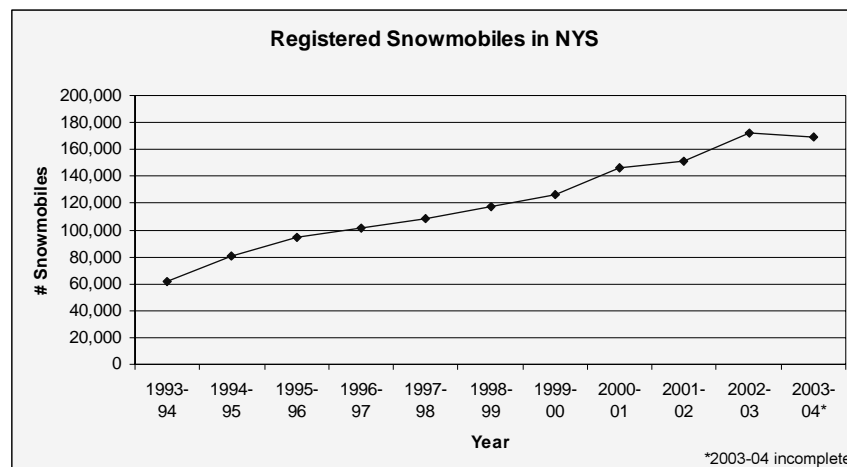
Spending by snowmobiling households generates an economic impact that New York State through both direct and indirect spending. In the 1998 study done by the New York State Snowmobile Association, Inc. and the Merwin Rural Service Institute, the total economic impact of snowmobiling in New York State was estimated at \$476.2 million. This money generates many benefits to New York State:

- Many people are employed directly by the snowmobile industry - dealers, suppliers, etc.
- Secondary employment in snowmobile related industries - hotels, restaurants, service stations, etc.
- Tourism dollars that assist rural communities during the winter season.
- Generation of local sales and gasoline tax dollars

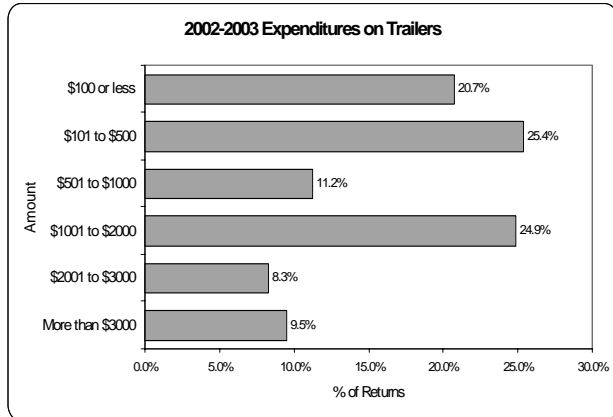
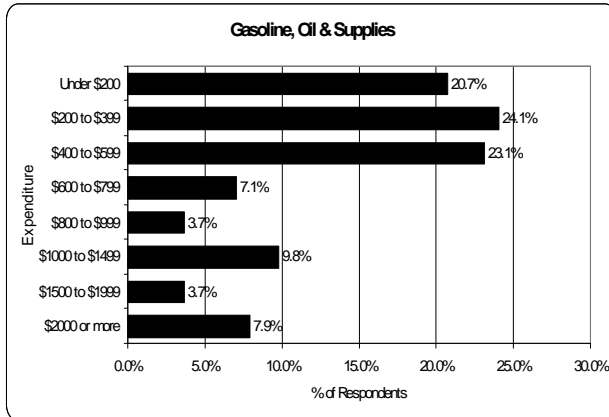
While it is premature at this point in the analysis to a precise figure of economic impact in New York State, it is certainly higher now than it was in 1998 for at least 2 reasons:

- The 1998 report estimated that there were over 108,000 registered snowmobiles in New York State - now there are approximately 170,000.
- Inflation, while low for the period 1998-2004, has continued. The increase in the Consumer Price Index (CPI) for the six year period from January 1998 to January 2004 has been 14.6%.

The 1998 report based a large part of the economic impact of snowmobilers on their expenditures in a number of categories. The aggregate spending by snowmobile households was estimated to be \$118 million. The three largest components of this figure were (1) purchase and maintenance of a trailer which accounted for \$39 million; (2) purchase of gas and oil in New York State and (3) insurance. These figures were calculated from the results of the 1998 survey for expenditure questions on these categories. The results at that time were (1) trailer expense: average \$818, median \$250; (2) gas and oil in NYS: average \$401, median \$250; and (3) insurance: average \$197, median \$138. The comparable figures gathered from the 2003 survey are: (1) trailer expense: average \$1205, median \$500; (2) gas and oil in NYS: average \$667, median \$400; and (3)

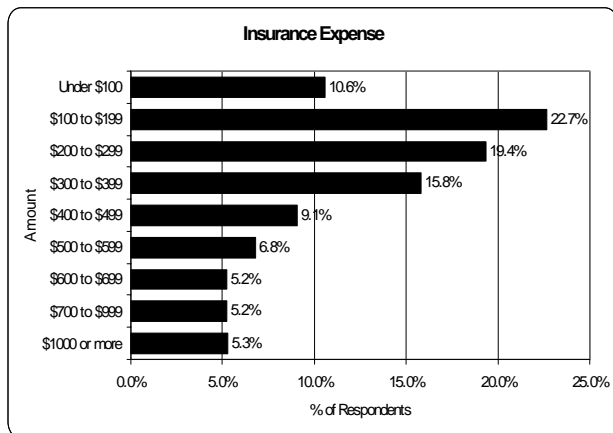


As the number of snowmobiles in New York State increases, so will the economic impact of snowmobiling



Comparison of current data to 1998:

<u>Trailer Expense</u>	Mean	Median
1998	\$818	\$250
2003	\$1205	\$500
<u>Gas, oil and supplies</u>		
1998	\$401	\$250
2003	\$667	\$400
<u>Insurance</u>		
1998	\$197	\$138
2003	\$400	\$250



insurance: average \$400, median \$250. It appears from this initial look at the figures that expenses are clearly higher today than in 1998. These figures are shown graphically above.

Travel is an important component of snowmobiling for many participants. Much of the snowmobiling done by New York residents takes place outside of New York State and consequently the economic activity generated takes place there as well. Similarly, New York State attracts many out-of-state residents who snowmobile here. This can be shown from the number of snowmobile registrations listed to out-of-state addresses, nearly 22,000 of a total of 166,000. Money spent by these individuals generates economic activity within New York State.

The following table shows the numbers that were used in 1998 in calculating the economic impact of snowmobiling households in the previous study and compares them with figures that were calculated from the current survey. The methodology used and assumptions made were kept

as close as possible to those used and made during the previous study so that the figures could have some comparison value.

Category of Expenditure	Total Statewide Spending	
	1998	2003
Club dues/fees	(a)	(a)
Club donations	(b)	(b)
Rent snowmobiles in NYS	\$146,373	\$358,595
Insurance	10,447,640	29,312,298
Maintenance / transport vehicle	9,733,807	14,788,961
Purchase maintenance of trailer	39,151,870	69,454,890
\$ for gas, oil / in NYS	20,575,355	44,038,008
Parts / Service in NYS	(c) 8,289,699	(c) 15,541,578
\$ @ motels / in NYS	(d) 6,524,472	(d) 9,287,376
\$ for meals / in NYS	8,770,449	13,341,564
Registration Fees	4,635,000	7,228,350
Total:	\$117,915,928	\$216,785,775

(a) In 1998 this item was included elsewhere in the analysis.
(b) In 1998 this item was included elsewhere in the analysis.
(c) One-half of the amount reported by households, because the remainder was assumed to be included in the Snowmobile Dealer summary in 1998. Therefore one-half the figure is used in the 2003 column.
(d) One-half of the amount reported by households, because the remainder was assumed to be included in the Snowmobile Dealer summary in 1998. Therefore one-half the figure is used in the 2003 column.

Based upon this early look at the data from the survey and other sources of information, it is expected a conservatively estimated economic impact of snowmobiling in New York State will be in the \$850 million to \$875 million range. Making assumptions similar to those made in 1998 and using updated figures an economic impact of \$875 million was calculated.

Economic impact will be dealt with in greater detail in a future report.

Snowmobile Owner Survey 2003



The State of New York works continually to improve the recreational experiences of its citizens. One of the approaches used to achieve this goal is to survey its citizens to determine their attitudes towards various aspects of recreation. You have been selected to participate in this survey because you own a snowmobile registered in New York State. Your response to this survey is important and will be used together with the responses of other snowmobilers to help guide policy and promote snowmobiling in New York State. This survey is a joint project with the New York State Snowmobiling Association. In completing this form, please note that 2002-2003 refers to one complete snowmobiling season only.

Part I: Profile of Your Snowmobiling Household

1. Are you a resident of New York State? Yes; No
 a. If yes, in which county do you live? _____ zip code _____
 b. If no, in which state / province do you live? _____ zip code _____

2. Please complete the following for each member of your household:

	You	Family Member #1	Family Member #2	Family Member #3	Family Member #4	Family Member #5
Age (years)						
Male / Female (Please Circle)	M F	M F	M F	M F	M F	M F
Days operated a snowmobile during the 2002-03 season						
How many years has this person snowmobiled?						
Did this person ever take a safety course? (Circle)	Y N	Y N	Y N	Y N	Y N	Y N

Please indicate the total number of people in your household if greater than 6 _____. How many of these snowmobile? _____

3. How many snowmobiles does your household own? _____ Please complete the following table for each snowmobile:

	Snowmobile #1	Snowmobile #2	Snowmobile #3	Snowmobile #4
Year purchased				
New / Used (Please Circle)	N U	N U	N U	N U
Amount Paid				
Engine Size (cc)				

4. Do you or others in your household belong to a snowmobile club? Yes; No

5. Are you familiar with the New York State Snowmobiling Association? Yes; No
If yes, are you a member? Yes; No

6. Please rate each of the following activities of the New York State Snowmobile Association on a scale of 1 (not important) to 5 (very important). Please circle your response:

a. Lobbying on legislative issues that affect snowmobiling	5	4	3	2	1
b. Coordinating with state agencies and private industries	5	4	3	2	1
c. Provide representation on various boards and associations	5	4	3	2	1
d. Provide representation for similar national organizations	5	4	3	2	1
e. Coordinate among snowmobile clubs	5	4	3	2	1
f. Protect the interests of local clubs and trail systems	5	4	3	2	1
g. Conduct studies (economic assessments)	5	4	3	2	1
h. Promote snowmobile safety and safety education	5	4	3	2	1
i. Promote snowmobiling through the media	5	4	3	2	1
j. Provide technical assistance to existing and new clubs	5	4	3	2	1

7. Did you or others in your household rent a snowmobile during the last year? Yes; No

8. How much did your household spend on insurance for your snowmobile(s) during the past year? \$ _____

9. Has anyone in your household purchased a vehicle primarily to transport your snowmobile(s)? Yes; No

10. How much did your household spend on the purchase, maintenance, etc. of trailers to carry snowmobiles last year? _____

11. Do you or others in your household own a second home, camp or property that is used for snowmobiling? Yes; No

12. Where did you go snowmobiling last year? For each family member noted in your response to question 3, please indicate how many **days** were spent snowmobiling in each of the following areas:

	You	Family Member 1	Family Member 2	Family Member 3	Family Member 4	Family Member 5
Within the county where you live						
Elsewhere within New York State						
U.S. outside New York State						
Canada						

Part II: Snowmobile Usage and Expenditures During the 2002-2003 Snowmobile Season

13. Did anyone in your household purchase a **new or used** snowmobile during the period 4/1/02 to 3/31/03? Yes; No
 If yes, how many snowmobiles were purchased during this time period? _____
 What was the total cost of these snowmobiles? \$ _____

14. How many miles did you and others in your household put on your snowmobile(s) during the 2002-2003 season?
 Inside NYS _____ Outside NYS _____

15. How much did you and others in your household spend on gasoline, oil and supplies?
 Inside NYS _____ Outside NYS _____

16. How much did your household spend on parts, service and repairs? Inside NYS _____ Outside NYS _____

17. How much did your household spend on snowmobiling clothing and accessories?
 Inside NYS _____ Outside NYS _____

18. Did you or others in your household go on overnight trips for the purpose of snowmobiling? Yes; No
If yes, please complete the following table:

		You	Family Member 1	Family Member 2	Family Member 3	Family Member 4	Family Member 5
# of overnights at a hotel/motel/b&b	Inside NY State						
	Outside NY State						
# of overnights not at a hotel/motel/b&b	Inside NY State						
	Outside NY State						
money spent at hotels/motels/b&bs	Inside NY State						
	Outside NY State						
money spent on meals	Inside NY State						
	Outside NY State						

Part III: Safety, Convenience, Support Services

19. Please rate the following items about snowmobile safety on state designated snowmobile trails in New York State during the 2002-03 snowmobiling season. Put a check mark in the appropriate box:

	Excellent	Good	Fair	Poor
Overall Safety on Trails				
Identification of hazards on trails				
Sharing trails with other users				
Behavior of other snowmobilers				

20. Please rate the following items about convenience of State designated snowmobile trails in New York State during the 2002-03 snowmobile season. Put a check mark in the appropriate box:

	Excellent	Good	Fair	Poor
Overall trail system				
Signage on trails				
Trail grooming				
Trail placement - scenic, natural value				
Access to trails from road				
Parking availability from roads				
Information about trails, activities				
Accuracy of trail maps, information				

21. Please rate the following items about support services for snowmobiling on state designated trails in New York State during the 2002-03 snowmobiling season. Put a check mark in the appropriate box:

	Excellent	Good	Fair	Poor
Food availability near trails				
Gas Station availability near trails				
Repair parts and services near trails				
Lodging for snowmobilers and equipment				

Part IV: Snowmobile Regulations

22. The major portion of NYS registration fees are used to maintain and develop a network of snowmobile trails.
- a. Should snowmobile registration fees be increased in order to extend and improve the maintenance grooming of the trail system? Yes; No; No Opinion. If yes, how much of an increase would you support? _____
 - b. Should snowmobile registration fees be increased in order to extend and improve the safety, programs and trail signage? Yes; No; No Opinion. If yes, how much of an increase would you support? _____
 - c. How much of an increase in registration fees would you support for law enforcement, safety training or rider education programs? _____

Part V: Promoting Snowmobiling in New York State

23. List the 3 most important things that could be done to improve your snowmobiling experiences in New York State:

- (1) _____
- (2) _____
- (3) _____

24. Please use this space for any further comments or suggestions to improve snowmobiling in New York State:

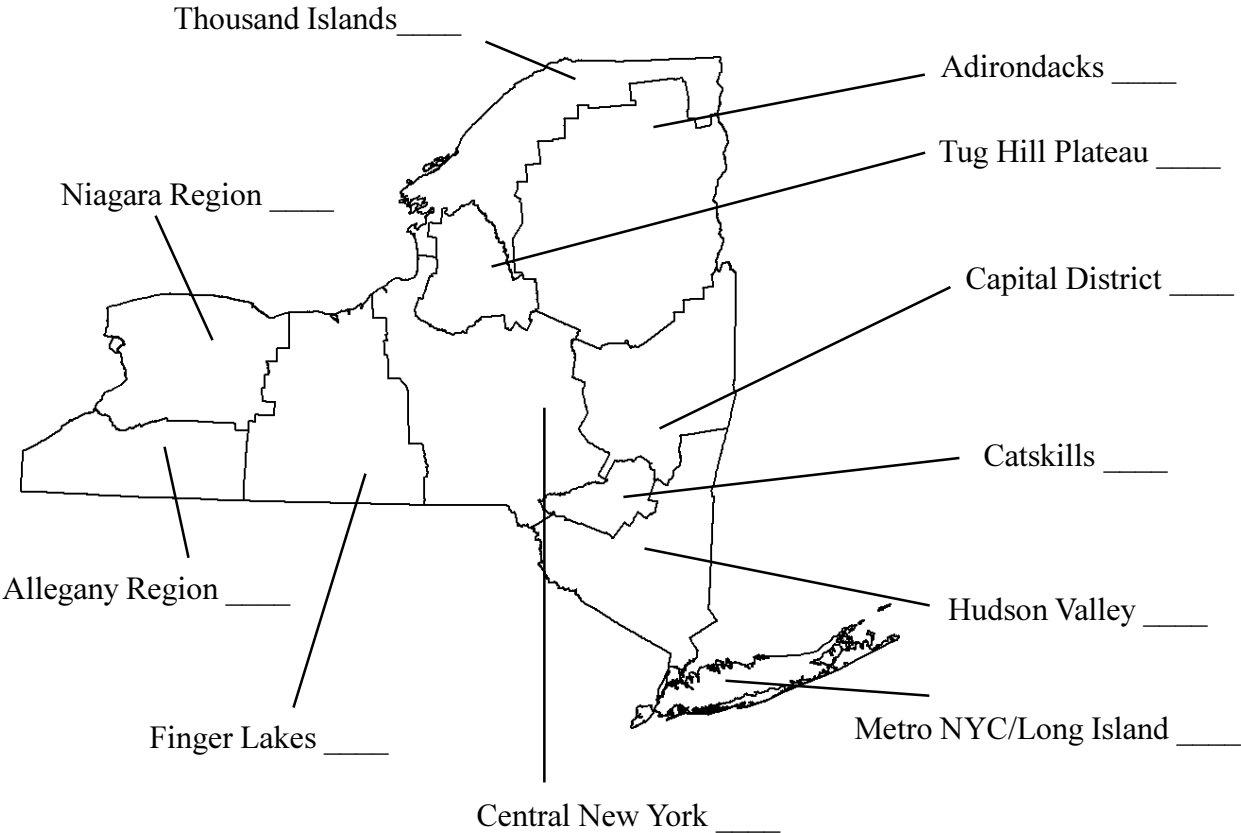
Part VI: General Information - The following information is being collected for statistical purposes only.

25. Please answer some questions about you and your household:

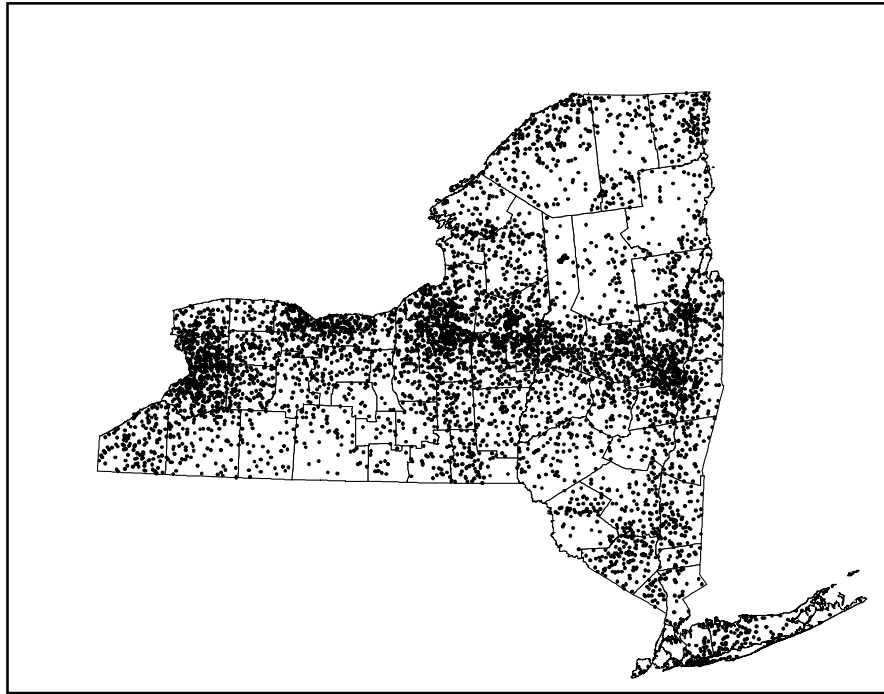
- a. Total household income in 2002
 - Less than \$20,000 \$20,000 - \$39,999 \$40,000 - \$59,999
 - \$60,000 - \$79,000 \$80,000 - \$99,999 \$100,000 or more
- b. Do you rent or own your primary residence? rent own
- c. Employment status. Check as many as are appropriate for you:
 - employed full-time employed part-time self-employed
 - retired student housewife unemployed
- d. Disability Status. Please check the box next to any of the family members noted in question 3 if he/she is a person with a disability:
 - You Family Member 1 Family Member 2
 - Family Member 3 Family Member 4 Family Member 5

**Thank you for helping New York State
improve recreation for you and your fellow citizens.**

Where did you snowmobile last year in New York State ?
Please indicate how many days you or a member of your household snowmobiled
within each area of the state.

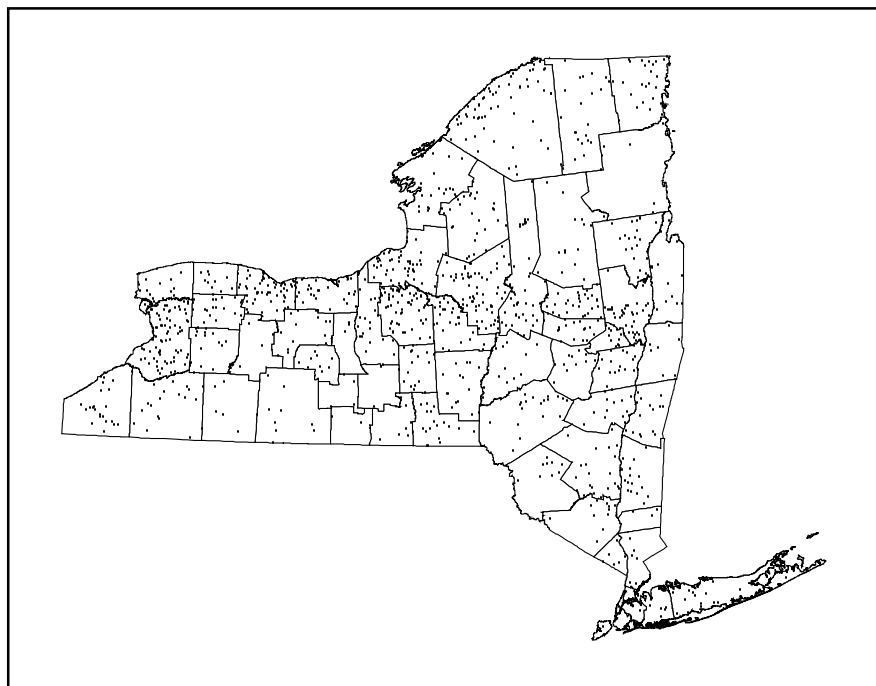


Appendix B: Returned Surveys and Registered Snowmobiles in New York State



One dot = 25 Registered Snowmobiles (NYS only).

The above map shows the location of all snowmobiles registered to citizens of New York State. The greatest density appears to be along the Mohawk Valley and Erie Canal. The map below shows the location of survey forms received from residents of New York State. Though somewhat more diffuse, there is a similar pattern of increased density along the above mentioned areas.



One dot = 1 Returned Survey Form (NYS only).