Discussion of the Snowmobile Owners Survey II

During the winter of 2013, 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 a survey distributed in November 2011 to owners of snowmobiles registered in New York State. The 2013 survey included many of the items from the 2011 survey, while adding new questions about current topics important to the snowmobiling community. 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 was created on a secure website.

Description of the Survey

The revised survey had forty-eight 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 Dominic Jacangelo, Executive Director 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, mobility limitations, number of snowmobiles in the household, snowmobile registration and future snowmobiling expectations. Respondents were allowed to provide additional information for as many as five snowmobiles.

Part II: Snowmobile Usage and Expenditures – This section asked participants about some snowmobiling expenditures during the 2012-2013 winter season. Specifically, expenditure questions included expenses regarding gasoline and trailers used to move snowmobiles. In addition, several questions were asked regarding distance traveled and location of visits to areas within New York State. New questions were asked about possession of other types of on and off- road vehicles, activities during non-winter seasons and membership in organizations other than snowmobile clubs.

Part III: Safety, Convenience and Support Services – This section asked participants to rate seven aspects of snowmobiling on New York State trails.

Part IV: Snowmobile Regulations and Trail Maintenance Fees - This section asks several questions about the snowmobile safety course, snowmobile registration, modified loud sleds, regulation of snowmobiling in Yellowstone National Park and the Adirondacks, snowmobile membership, the American Council of Snowmobile Associations 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 3,000 paper surveys was mailed on April 15, 2013 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, using generally accepted sampling methodology, 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.

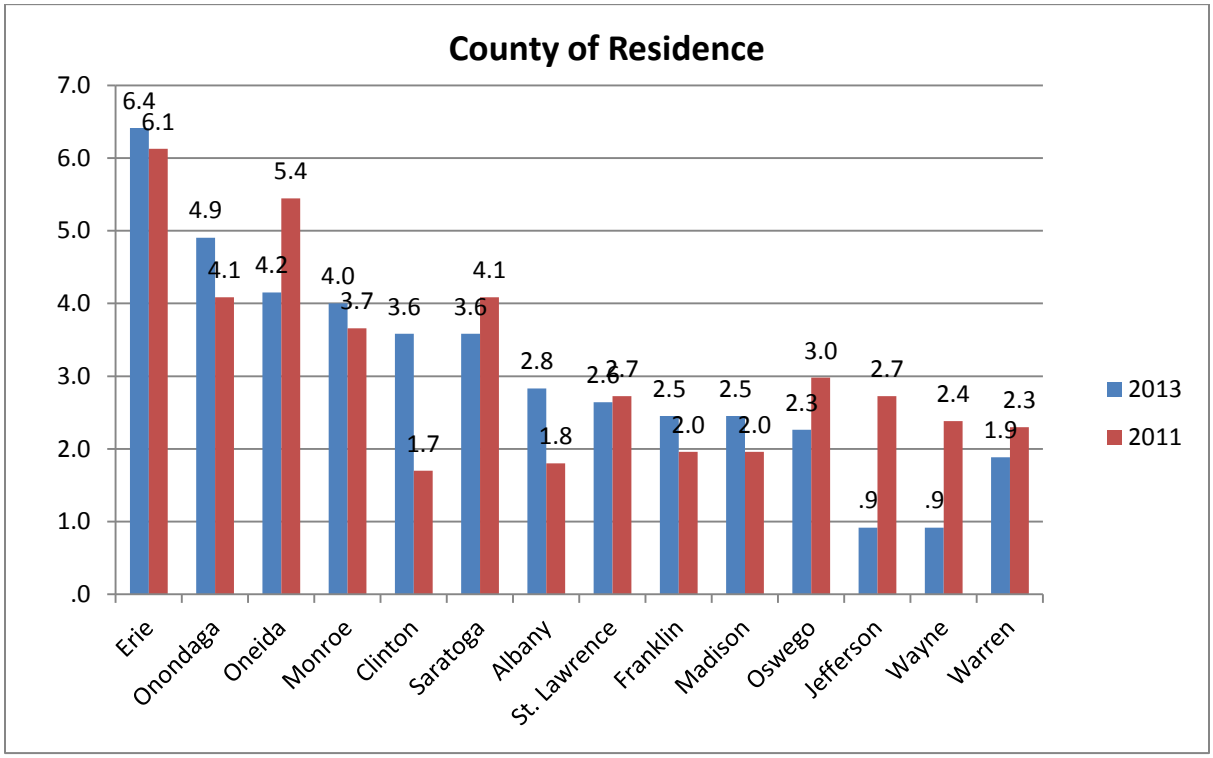
The survey questions were, also, made available in an online format using a domain of the Potsdam Institute for Applied Research (PIAR). Participants were able to access the survey via the Internet through a secure website, utilizing an SSL certificate with high grade 256-bit encryption. Each paper survey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

From the random sample group of respondents, 545 surveys were returned to PIAR or completed using the online version. This is a response rate of 18%.

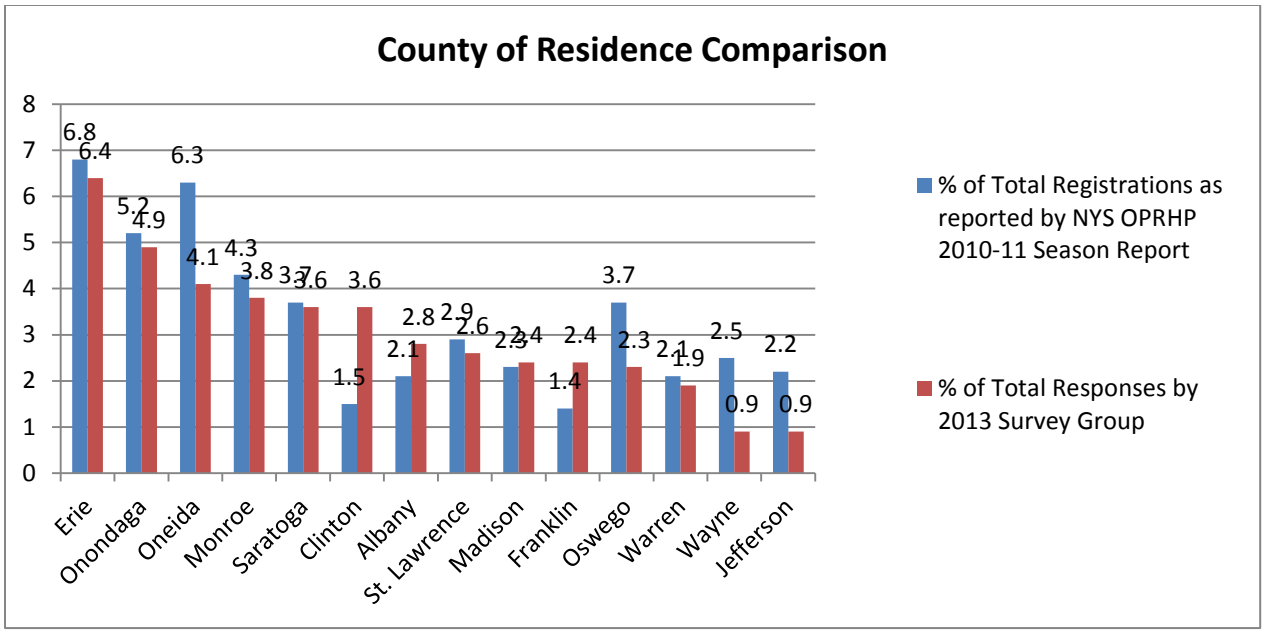
General Discussion of Survey Results

Part I: Profile of Your Snowmobiling Household

Approximately 83% of the 2013 respondents reported that they were residents of New York State, compared to 85% of the respondents in 2011. Six counties, Erie, Onondaga, Oneida, Monroe, Saratoga, and St. Lawrence counties were among the top ten for both of the 2011 and 2013 respondents groups.



Comparing the county of residence for the 2013 sample group with New York State's Office of Parks, Recreation and Historic Preservation's (OPRHP) Snowmobile Unit Season Report for 2010-11, the representation of counties is consistent with snowmobile registrations for that winter. It is noted that the comparison is not an apples to apples comparison because the New York State OPRHP Report listed percentages of registered snowmobiles in each county and the 2013 sample group for this survey reports percentages of household in each county.


County of Residence Comparison
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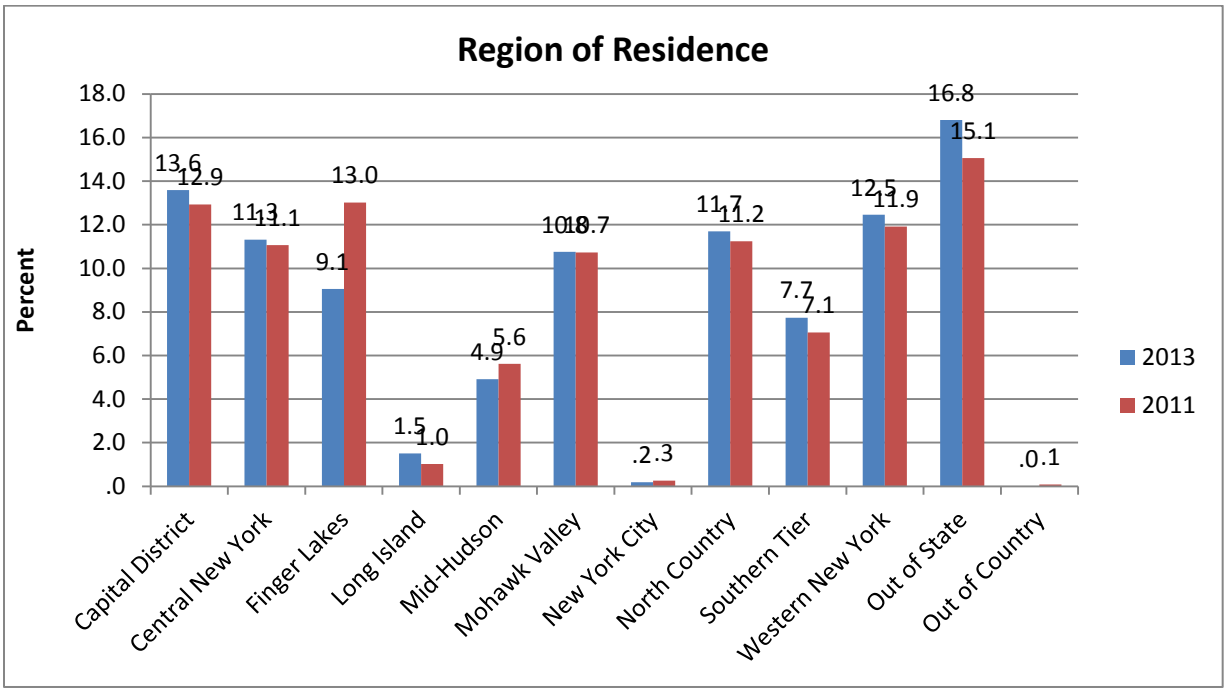
Erie
Onondaga
Oneida
Monroe
Saratoga
Clinton
Albany
St. Lawrence
Madison
Franklin
Oswego
Warren
Wayne
Jefferson
% of Total Registrations as reported by NYS OPRHP 2010-11 Season Report
% of Total Responses by 2013 Survey Group

The counties of residence were organized into ten economic development regions as used by the New York Empire State Development Agency. The Capital District and Western New York regions had the largest number of respondents in 2013 compared with the Capital District and Finger Lakes regions in 2011.

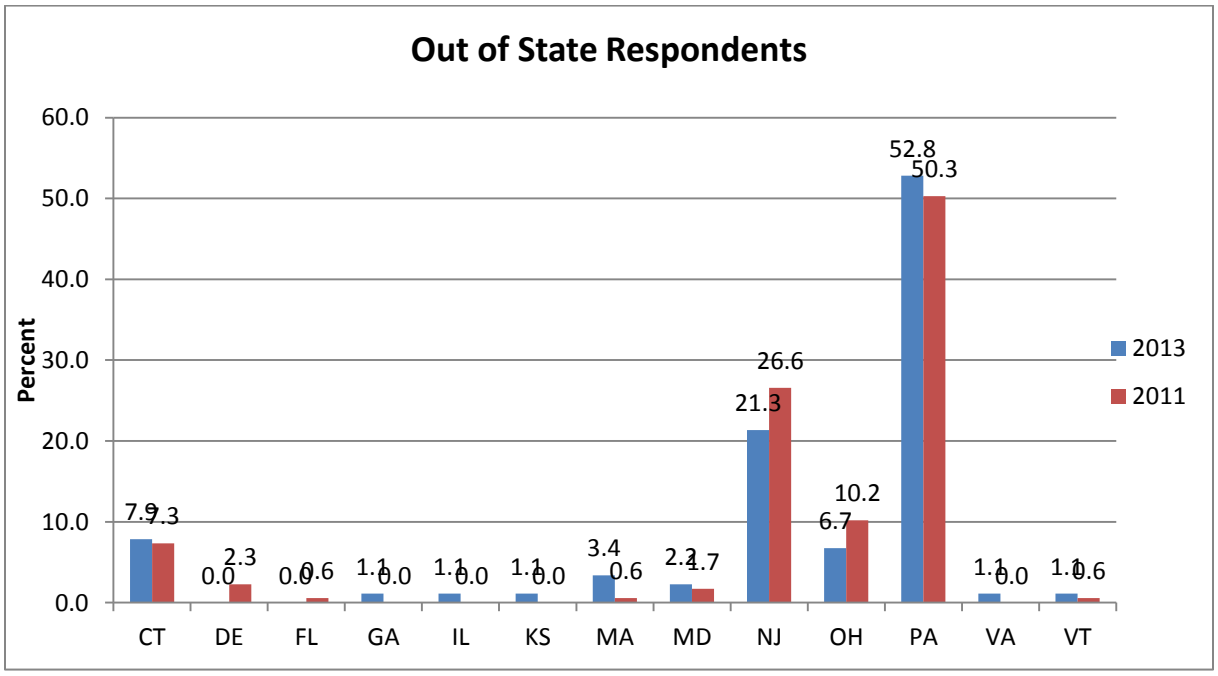


Note:

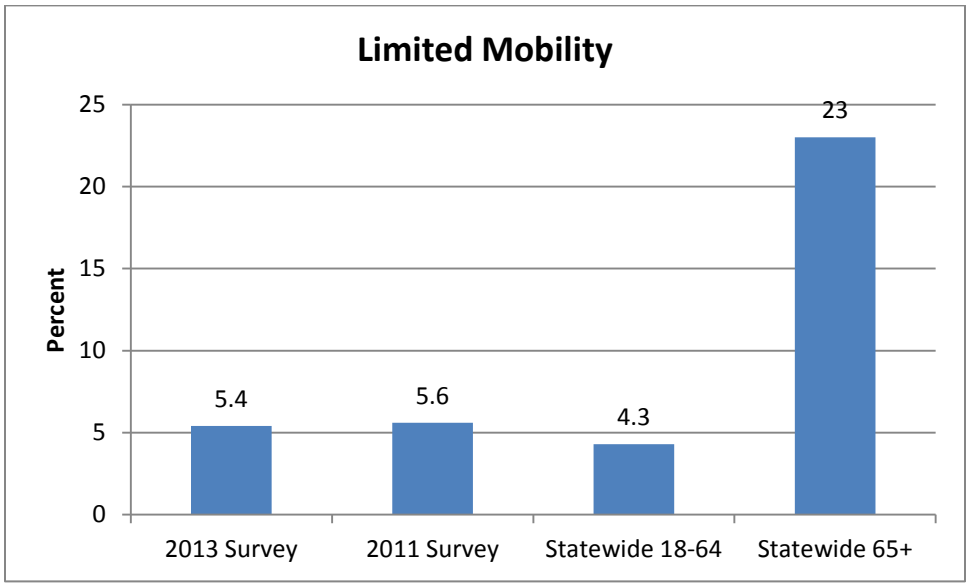
NYS Empire State Development regions include the following counties:

- **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, 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 seventeen percent (16.8%) of the 2013 respondents reported that they reside in states other than New York State, compared to fifteen percent (15.1%) of the 2011 survey respondents. The 2013 survey group had respondents from eleven states with approximately eighty-nine percent (88.7%) from Pennsylvania (52.8%), New Jersey (21.3%), Ohio (6.7%) and Connecticut (7.9%). The 2011 survey group had respondents from nine states with over ninety-four percent from Pennsylvania (50.3%), New Jersey (26.6%), Ohio (10.2%) and Connecticut (7.3%).



Approximately five percent (5.4%) of the 2013 survey group of respondents reported a household member with limited mobility, compared with approximately the same percent (5.6%) of the 2011 random sample group of respondents. 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.

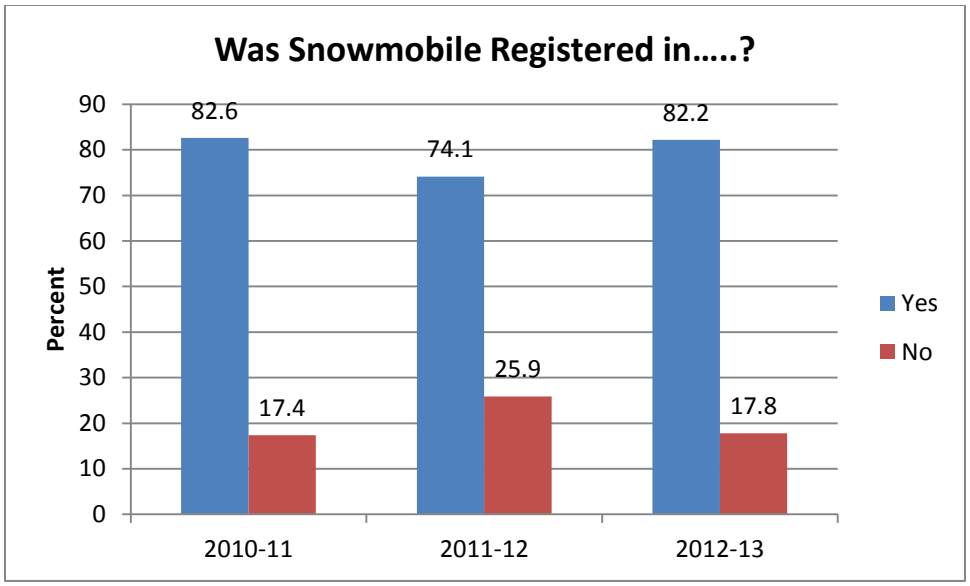


Snowmobile Sled Data

Information was provided by the respondents for 1,276 sleds. The average number of snowmobiles owned by the 2013 survey respondents was 2.51, as compared with the average of all of the 2011 survey respondents of 2.42 sleds. The most frequently cited number of snowmobiles owned by both survey groups was two (the mode). The 2013 survey group purchased, approximately forty-seven percent (46.8%) as new sleds, which is similar to the percentage (46%) which were purchased new by the 2011 survey group. The snowmobile sleds were purchased from 1969 to 2013 with the largest number (mode) purchased in 2010.

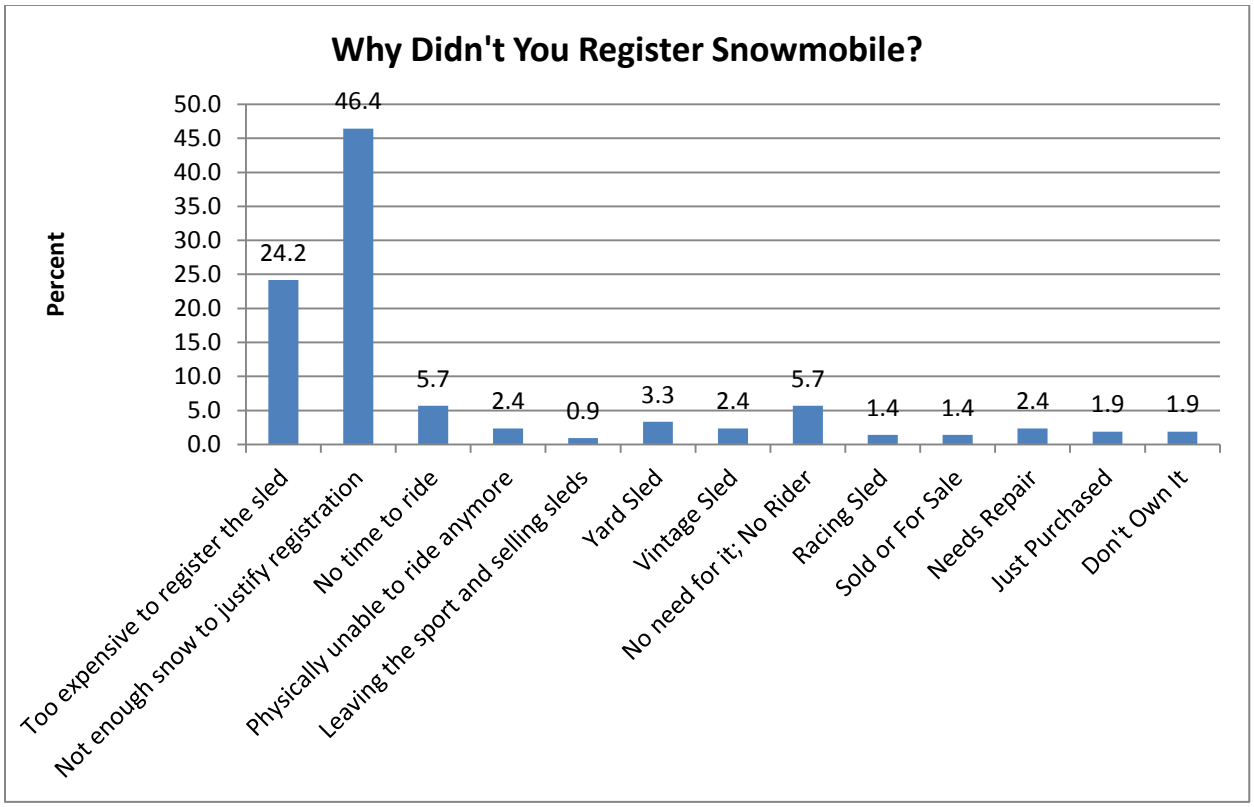
Snowmobile registration was a new question on the 2013 Snowmobile Owners survey. For each snowmobile reported, owners were asked if the sled was registered during the last three snowmobile seasons. During the winter season of 2011-12, when conditions were warm with less than average snowfall in most parts of New York State, over eight percent (8.5%) fewer of the 2013 respondents indicated that their snowmobile was registered.

It is possible to speculate that, since 2010-11 and 2012-13 were average or better snowfall years, approximately 17% of snowmobile sleds are never registered. Registrations of snowmobile sleds in 2011-12 were at a sixteen year low, most likely due to poor sledding conditions in New York State that year. Registration fees remained constant during the three year period so it is likely that the amount of snowfall was the variable affecting number of registered snowmobile sleds.

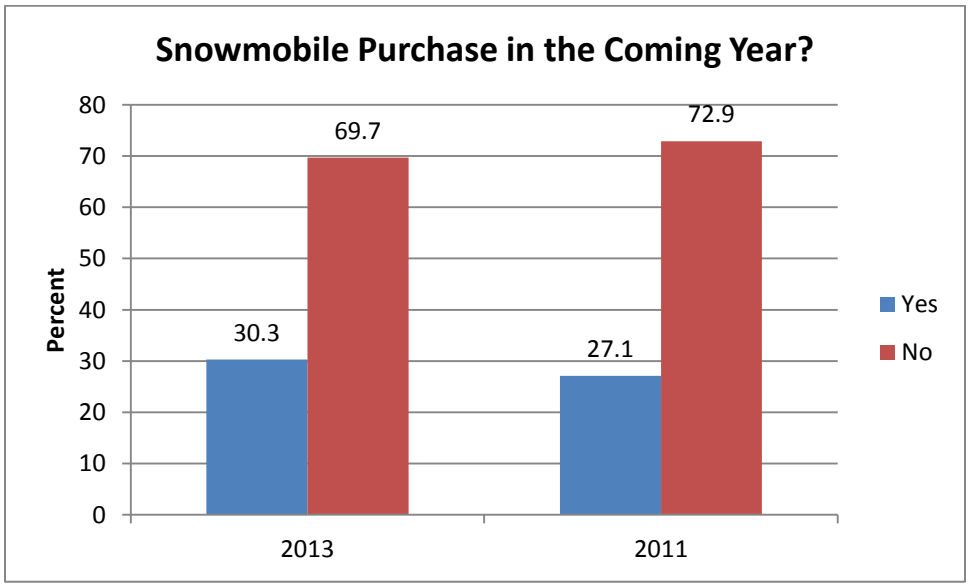


Respondents on the 2013 survey were asked to state why they did not register their sled if the response was no for any one of the winter seasons. The most frequently reported reason was that there was not enough snow to justify registration of the sled (46.4%), followed by the reason that it was too expensive to register the sled (24.2%). Since the cost to register a snowmobile remained constant during this three year time period, economic factors of the recovering economy may have prompted the second most frequently reported response.

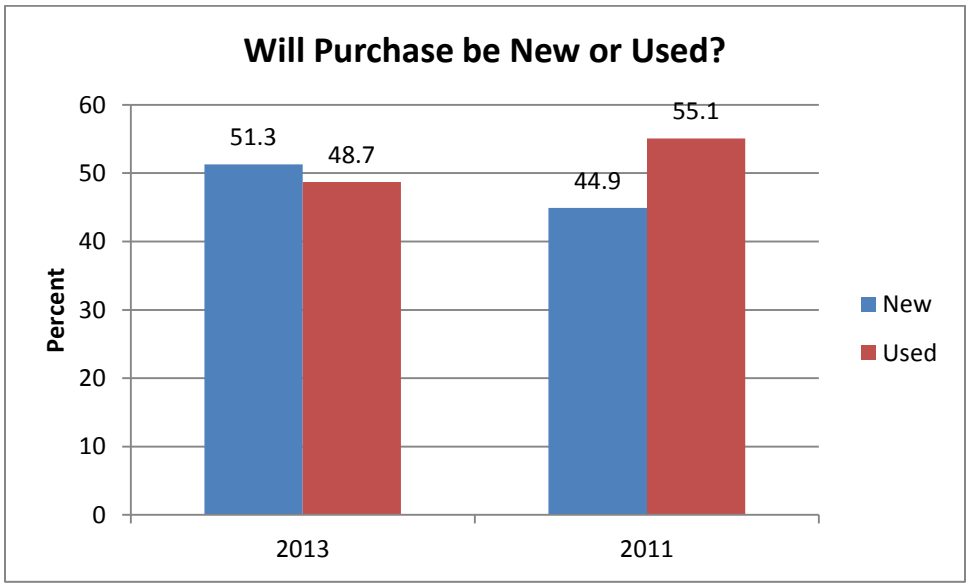
Positive news for the sport of snowmobile sledding is that fewer than one percent (0.9%) of the respondents reported that they were leaving the sport and selling their sled. The data suggests that in any two year period, less than five percent (5%) of snowmobile sleds are likely to change hands through sale.



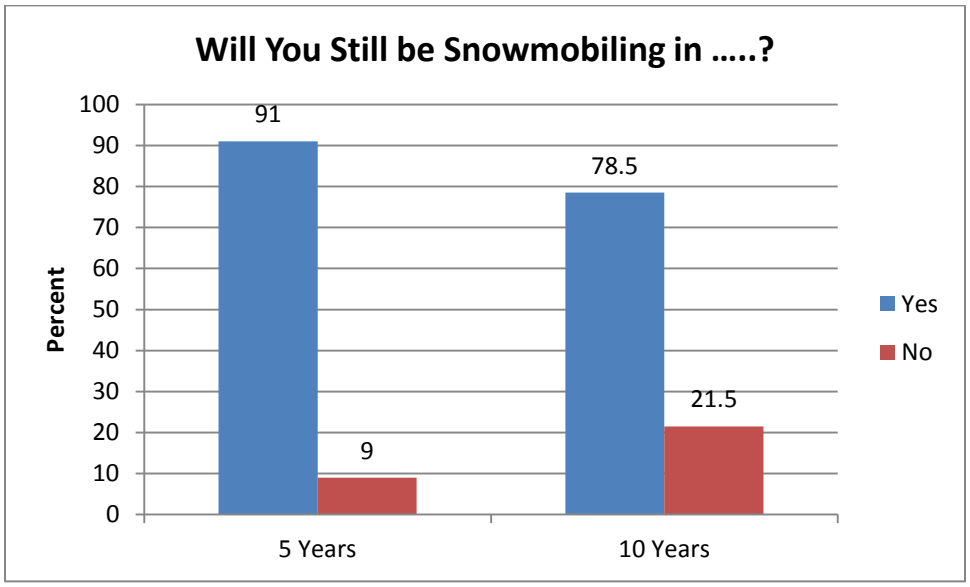
Respondents were asked if it was likely that they would purchase another snowmobile in the coming year, and if so, would it be new or used. Just over thirty percent (30.3%) of the 2013 survey group indicated that another snowmobile would be purchased in the coming year. This is approximately three percentage points (3.2%) higher than the 2011 survey group, a significant difference at the 95% confidence level. A significant difference means that the difference was more than would happen by chance.



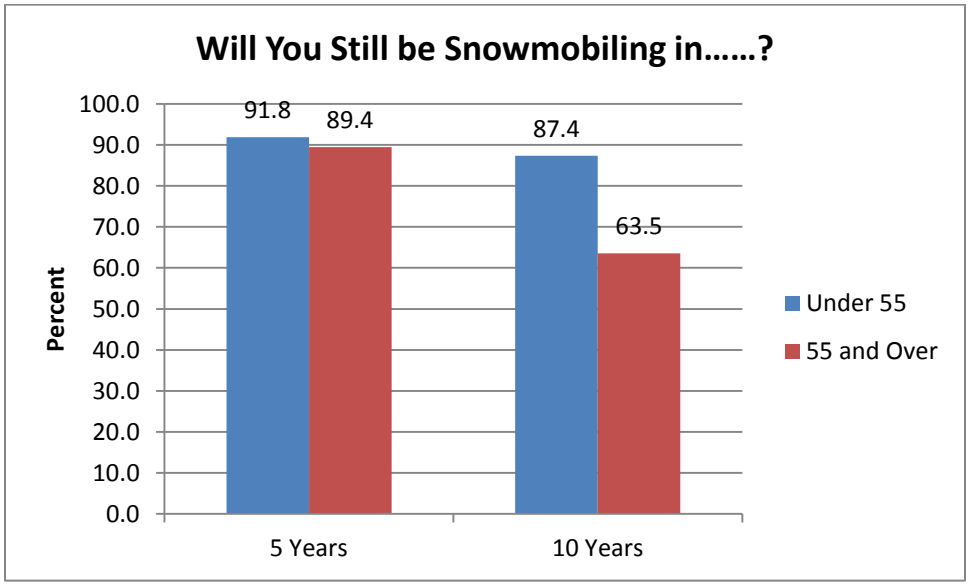
Of those intending to purchase another snowmobile, over six percent (6.4%) more of the 2013 survey respondents were planning to purchase a new snowmobile, compared to the 2011 survey group. Again, this difference is significant at the 95% confidence level.



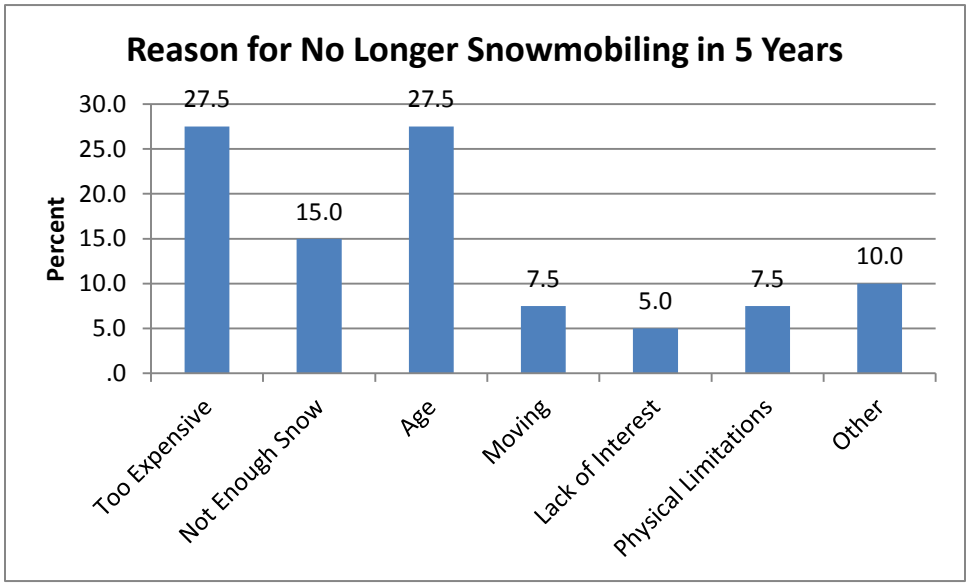
Respondents to the 2013 Snowmobile Owner's survey were asked if they expected to be still snowmobiling in five and ten years. Ninety-one percent (91%) responded that they still expect to be snowmobiling in five years and, approximately, seventy-nine percent (78.5%) expect to be snowmobiling in ten years.



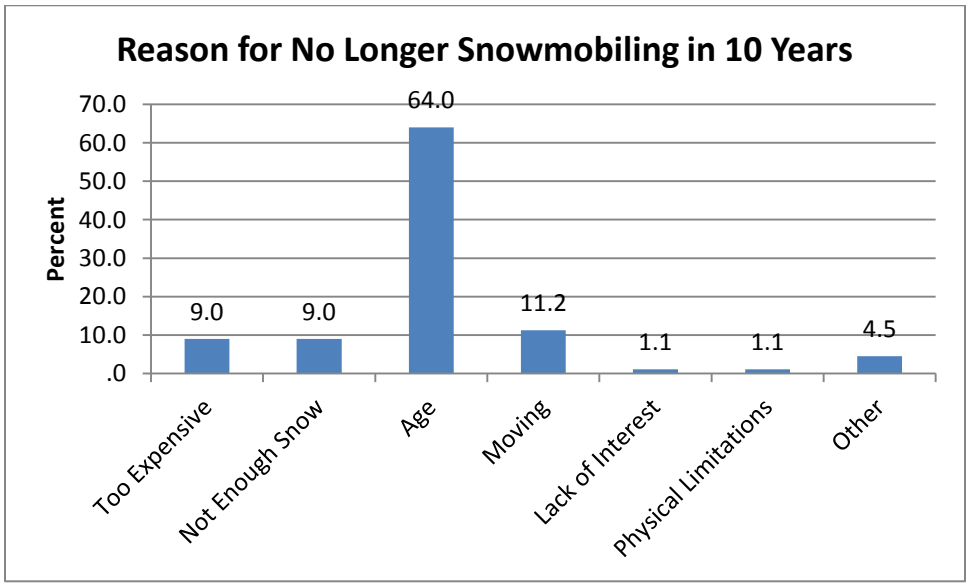
An analysis of the previous question relative to the age of the respondent provided the following results. Respondents who were 55 years old or older were slightly less likely (2.4%) to report that they would still be snowmobiling in five years. However, approximately twenty-four percent (23.9%) fewer of the older age group reported that they would still be snowmobiling in ten years.



Forty-eight respondents reported that they would no longer be snowmobiling in five years. Age and the expense of registering a sled were cited most often (27.5%) by those snowmobile respondents who indicated that they would no longer be snowmobiling in five years.



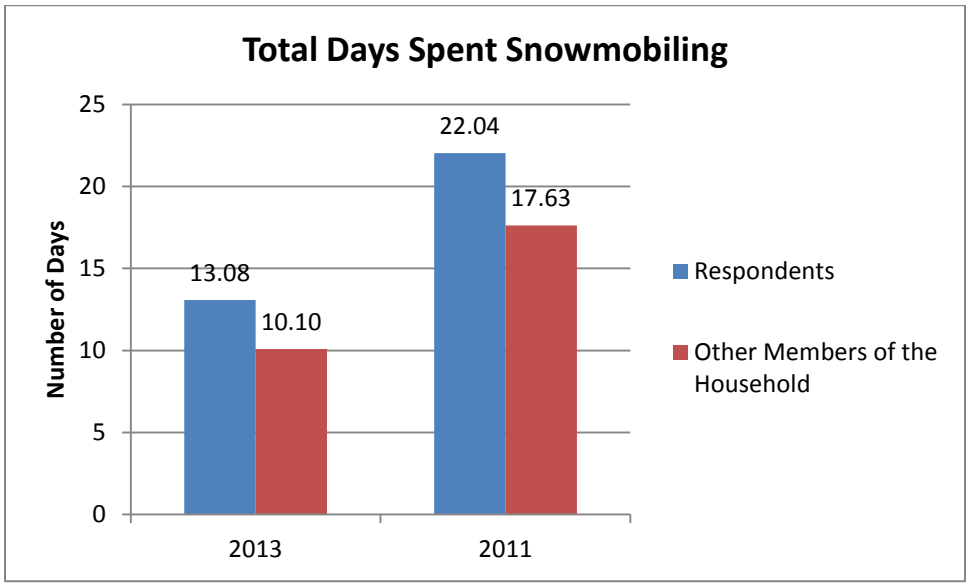
One hundred thirteen respondents reported that they would no longer be snowmobiling in ten years. Age was cited overwhelmingly by the snowmobile owners who responded that they would no longer be snowmobiling in ten years.



Part II: Snowmobile Usage and Expenditures

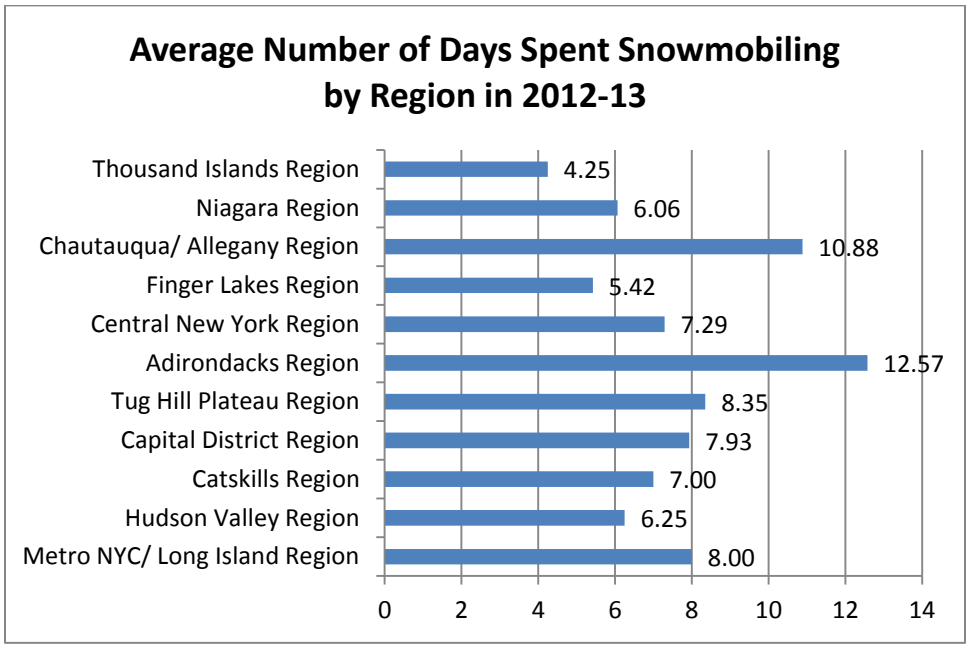
Total Days Spent Snowmobiling

The average number of days spent snowmobiling by the respondents during the 2012-13 winter season was, approximately, thirteen days, compared to twenty-two days by the 2011 survey respondents for the 2010-11 winter season. It was reported by the 2013 survey respondents that other members of the household spent ten days snowmobiling, compared to, approximately, eighteen days spent snowmobiling by other members of the respondents' household from the 2011 survey respondents.

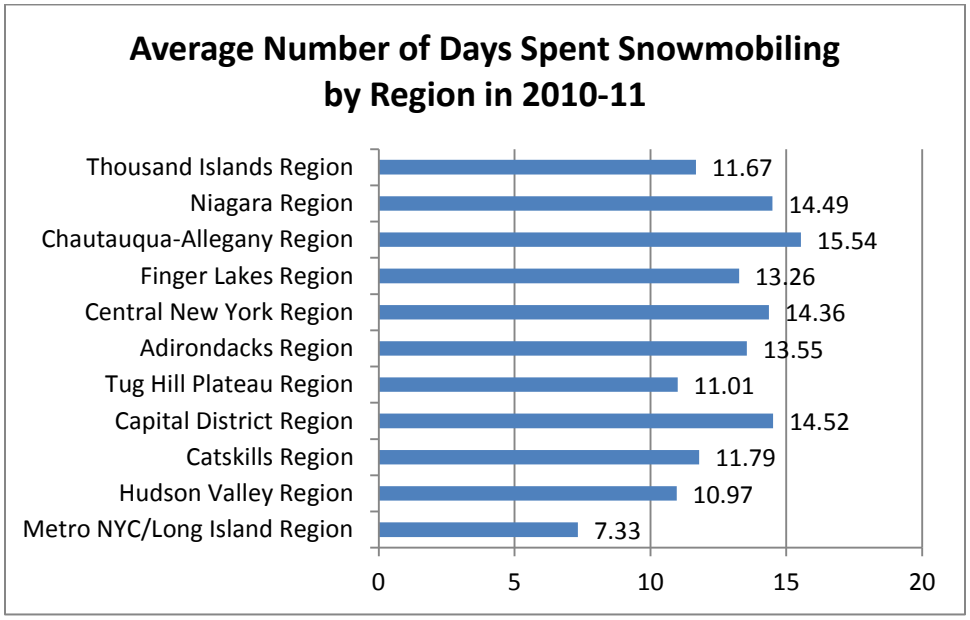


It can be estimated that the total statewide number of days spent snowmobiling in 2012-13 was 1,170,000 utilizing the responses provided by the 2012-13 sample group and multiplying by 90,000, the number of households in the state with registered snowmobiles.

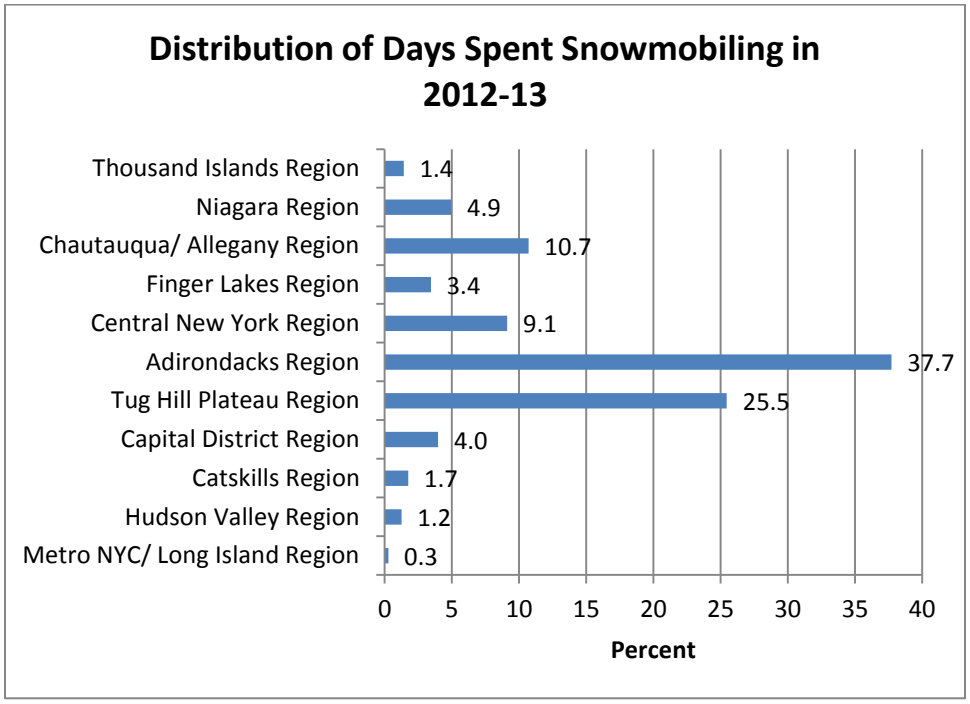
The total number of days spent snowmobiling during 2012-13 as reported by 545 respondents was 3,567. The highest average number of days spent snowmobiling was in the Adirondacks region, followed by the Chautauqua/Allegany region. The following graphs show the average number of days spent snowmobiling in a region for 2012-13 and 2010-11.

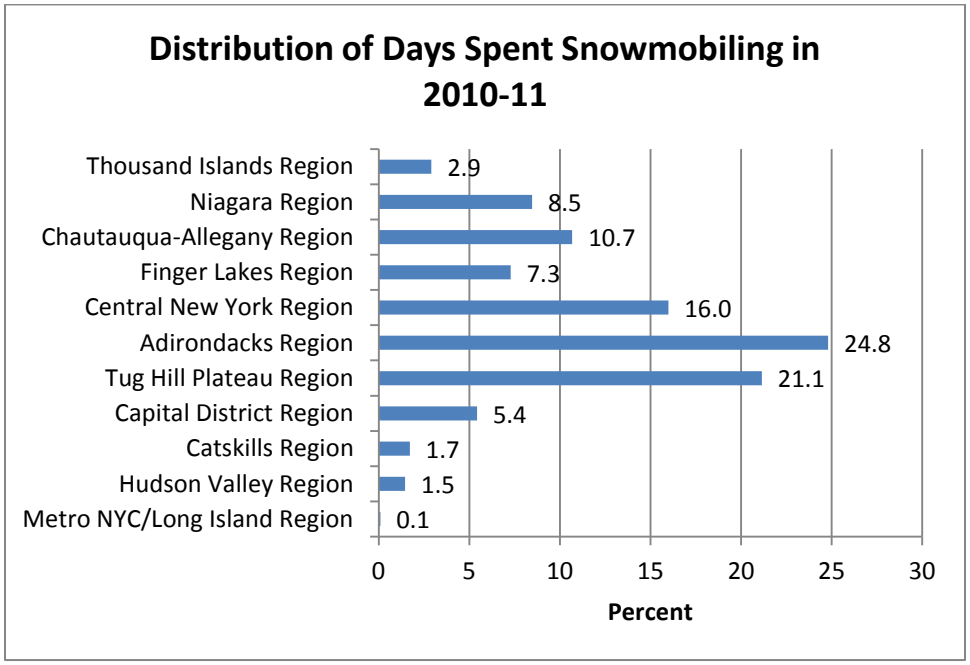


In comparison, the total number of days spent snowmobiling during 2010-11 as reported by the 1203 randomly sampled respondents was 23,269. During 2010-2011, the highest average number of days spent snowmobiling was in the Chautauqua/Allegany region.



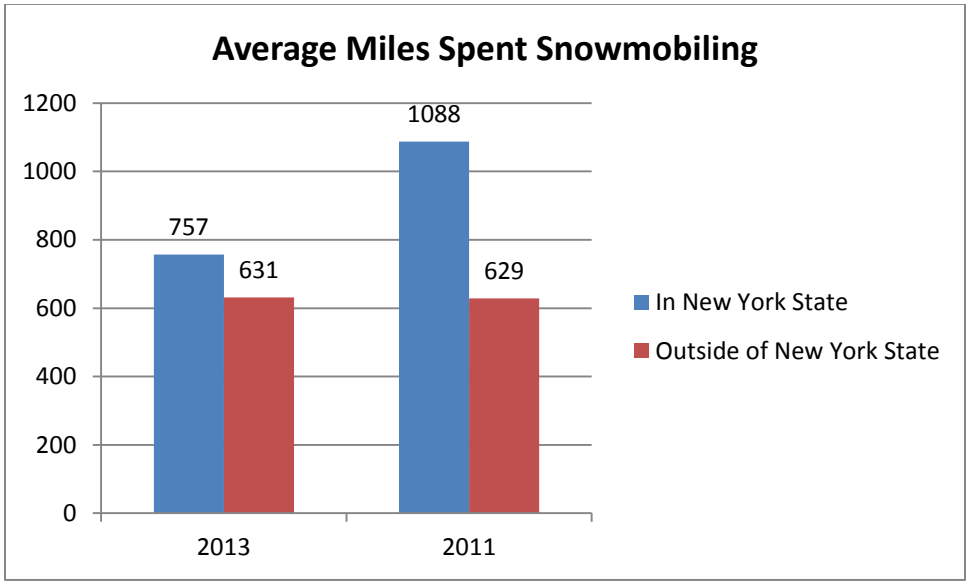
It is possible to estimate where the most snowmobiling is taking place. As can be seen on the charts below, the largest percentage of the days spent snowmobiling in 2012-13, as well as 2010-11, was in the Adirondacks region, followed by the Tug Hill Plateau region. Even though these regions may not have had the highest individual average number of days snowmobiling, the percentages are larger due to the higher number of individuals snowmobiling in those regions.



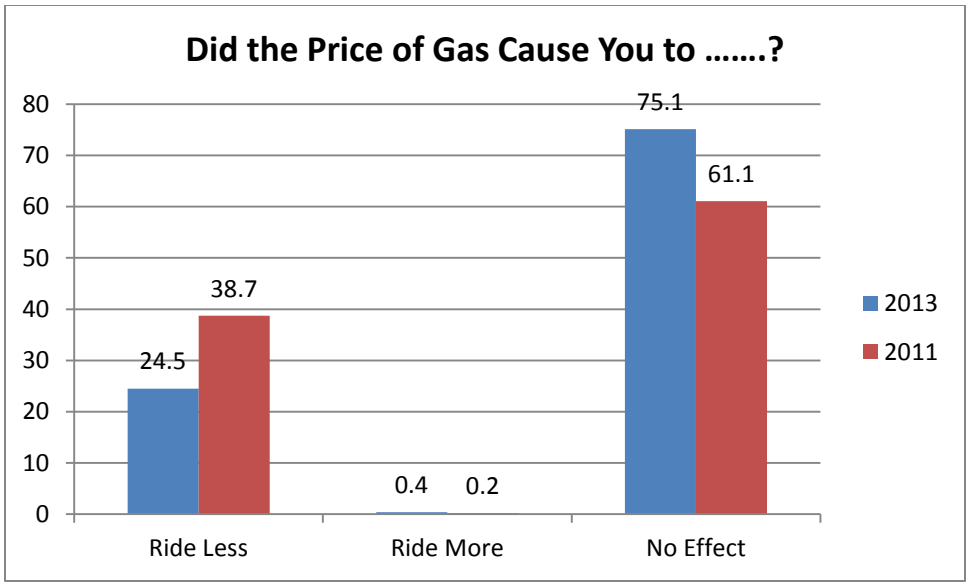


On average, the 2011 survey group of snowmobilers rode 331 miles further in New York State than the 2013 survey group. This is about one third less mileage during the 2012-13 winter season. It is reasonable to presume that total miles traveled during the 2012-13 season was between 67.5 million (# of households times 750) and 100 million miles (number of registered sleds times 750). 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 snowmobiled outside of New York State, both survey groups reported that they rode less than in New York State, although both groups of respondents reported that they rode, approximately, 630 miles outside of New York State.



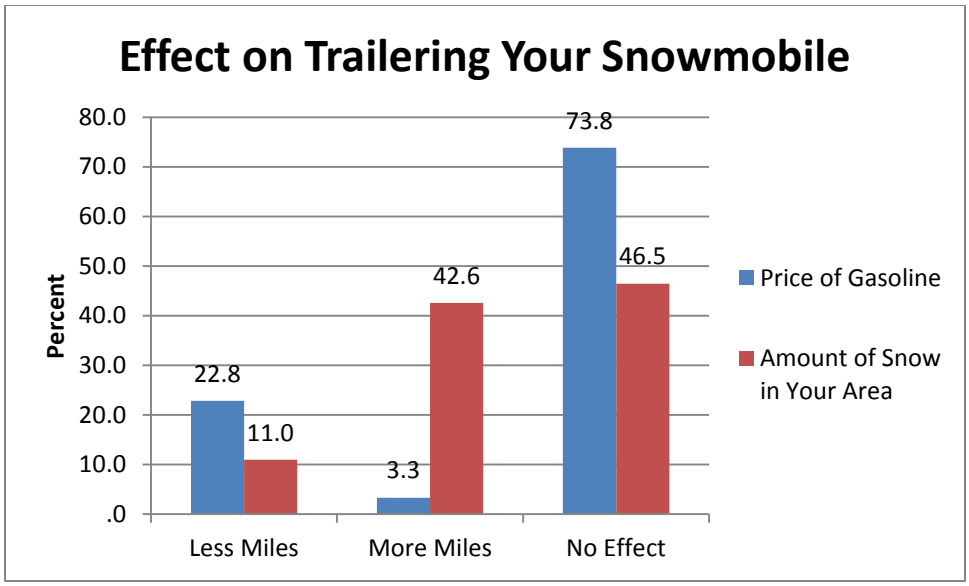
Over seventy-five (75.1%) percent of the 2013 survey respondents reported that the price of gas during 2012-13 had no effect on the amount of time spent snowmobile riding, compared to, approximately sixty-one percent (61.1%) of the 2011 survey respondents.



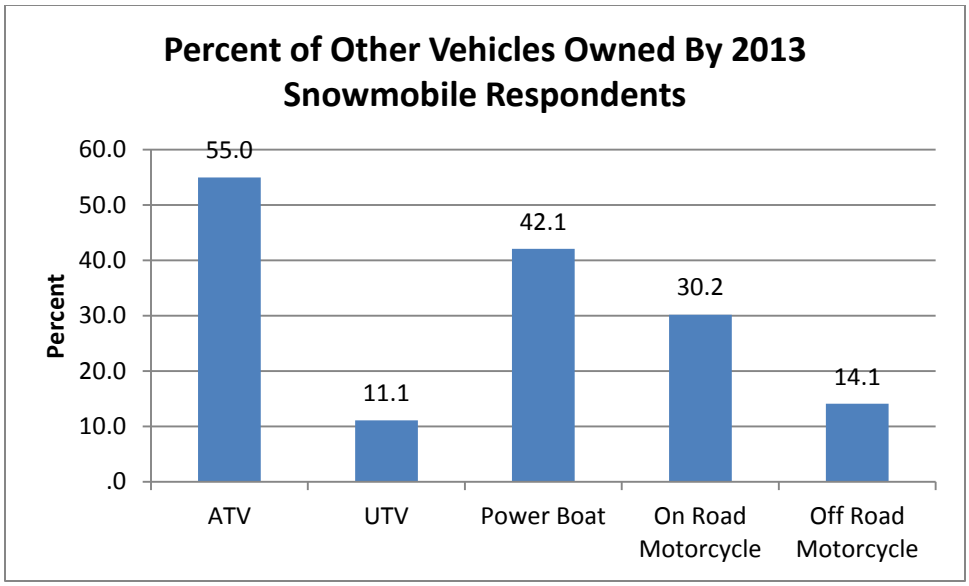
Traveling for snowmobiling was one focus of the 2013 Snowmobile Owner's survey. Approximately seventy-six percent (76.3%) of the 2013 survey respondents reported that they own a snowmobile trailer. Forty-six percent (46.1%) of the respondents indicated that they purchased their trailer as a new trailer while fifty-four percent purchased their trailer used. The average price of the trailers purchased was $2,619.70. The average number of days that snowmobiles were trailered to another area in the state was 8.51 days and the average number of miles traveled with the trailer was 723 miles. This would equate to an average of, approximately 85 miles per trip.

When asked if the price of gasoline had an effect on respondents' decision to trailer their trailers, approximately, seventy-four percent (73.8%) of the respondents reported that the price of gasoline had no effect.

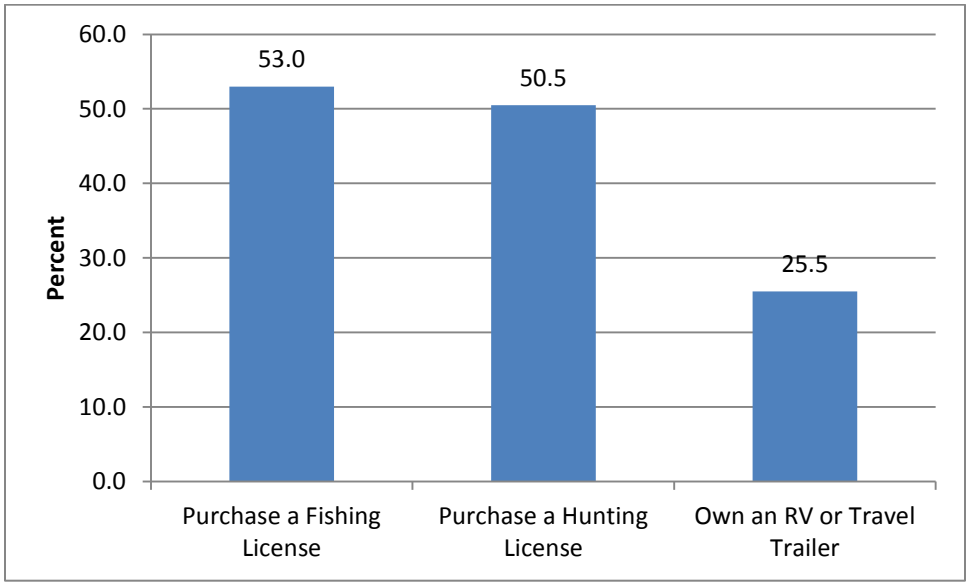
The 2013 snowmobile owners were asked if, compared to an average year, the amount of snow in their region had an effect on trailering their snowmobile. Approximately forty-three percent (42.6%) of the respondents reported that they traveled more miles, while over forty-six percent (46.5%) reported that the amount of snow in their area had no effect.



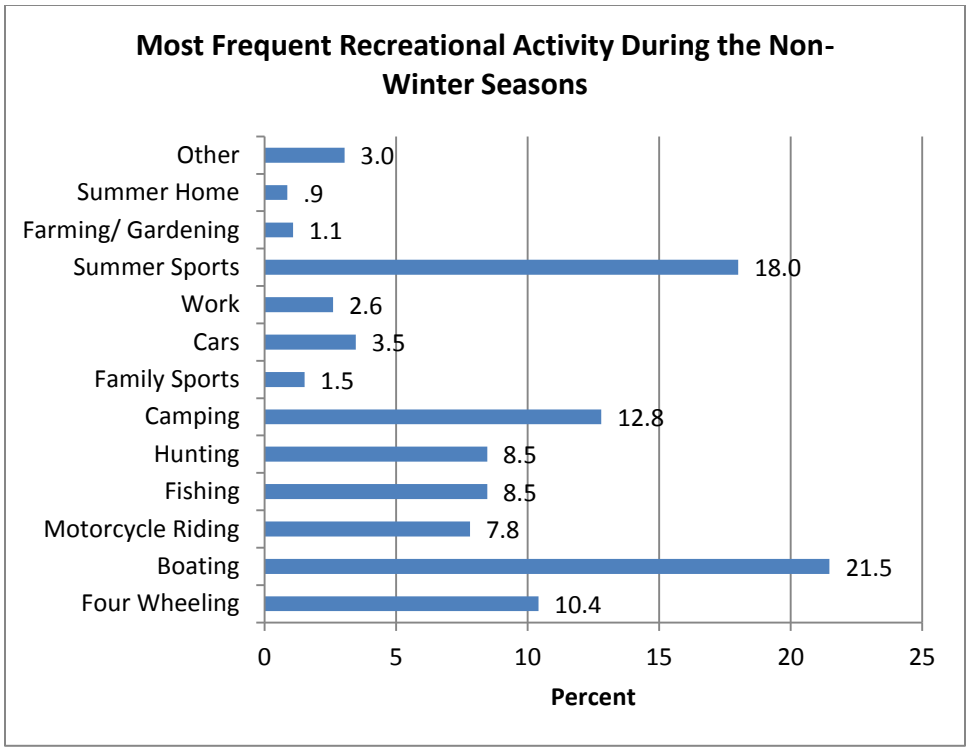
The 2013 Snowmobile Owners were asked about possession of other types of on and off-road vehicles, as well as activities during the non-winter seasons of the year. The largest percentage of the respondents reported that they owned an ATV (55%), followed by a power boat (42.1%) and an on-road motorcycle (30.2%).



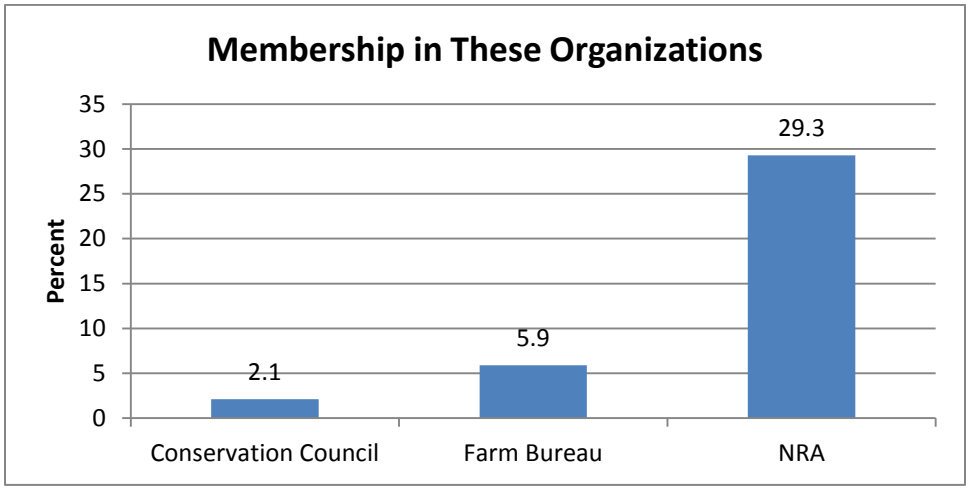
In addition, fifty-three percent (53%) of the respondents reported that they purchase a fishing license, over fifty percent (50.5%) purchase a hunting license and, approximately, twenty-six percent (25.5%) own an RV or travel trailer.



The 2013 Snowmobile Owners were asked what their most frequent recreational activity was during the non-winter seasons. Boating was reported by the largest number of respondents (21.5%), followed by summer sports, which includes hiking, running, walking, swimming, golf, baseball, soccer, softball (18%), camping (12.8%) and four wheeling (10.4%).



Membership in three organizations other than snowmobile clubs or the NYSSA was asked of the 2013 Snowmobile Owners. The largest percentage of the respondents reported NRA membership.



Part III: Safety, Convenience and Support Services

Of seven measures regarding safety and convenience on New York State trails, 2013 respondents reported highest percentages of satisfaction with Overall Safety on Trails (over 89%) and Identification of Hazards on Trails (87%). Lowest percentages of satisfaction were with Information about Trail Conditions

(approximately 51%) and Trail Grooming (approximately 65%). Satisfaction is defined as those respondents who indicated “Excellent” or “Good” as their responses.

2013 Ratings of Trail Safety and Convenience (Percentages)

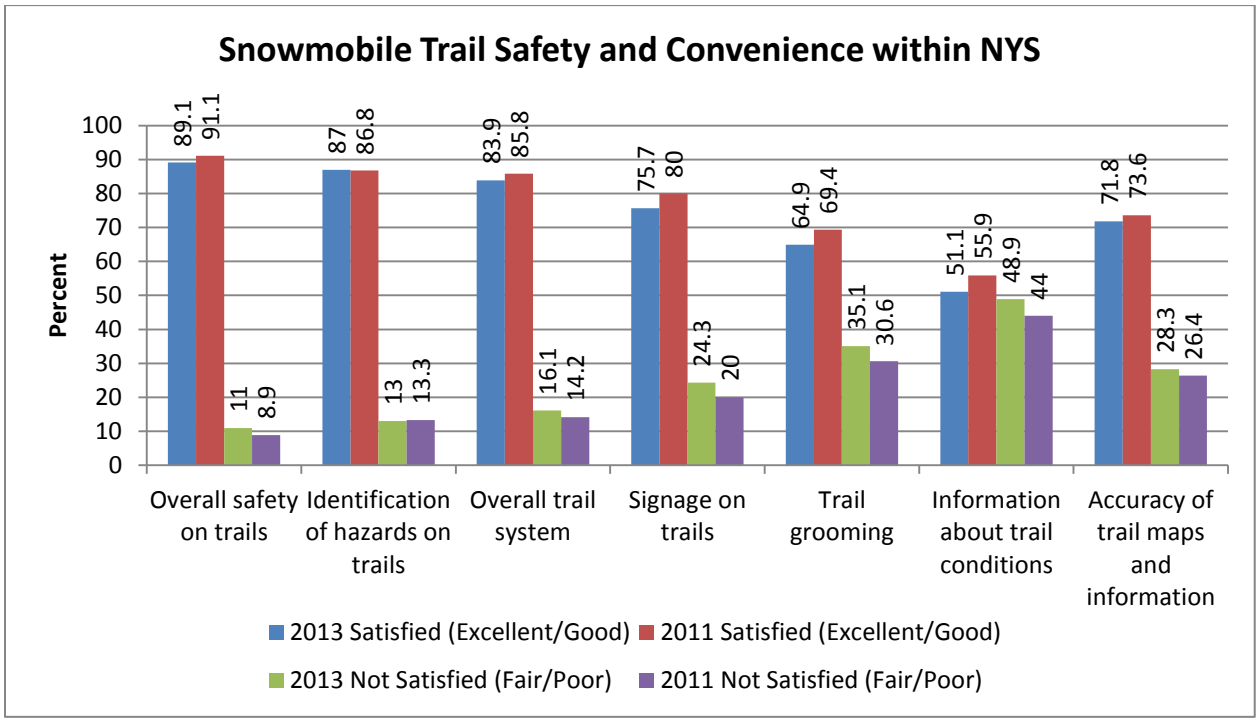
	Excellent	Good	Fair	Poor
Overall safety on trails	24.4	64.7	9.8	1.2
Identification of hazards on trails	24.5	62.5	11.9	1.1
Overall trail system	23.5	60.4	13.8	2.3
Signage on trails	20.7	55.0	21.0	3.3
Trail grooming	17.3	47.6	28.5	6.6
Information about trail conditions	12.7	38.4	36.6	12.3
Accuracy of trail maps and information	16.7	55.1	23.0	5.3

The responses from the 2013 survey mirror the highest and lowest measures from the 2011 survey although the overall levels of satisfaction were lower in 2013 for six of the seven measures, with Identification of Hazards on Trails slightly higher in 2013 (87% to 86.8%)

2011 Ratings of Trail Safety and Convenience (Percentages)

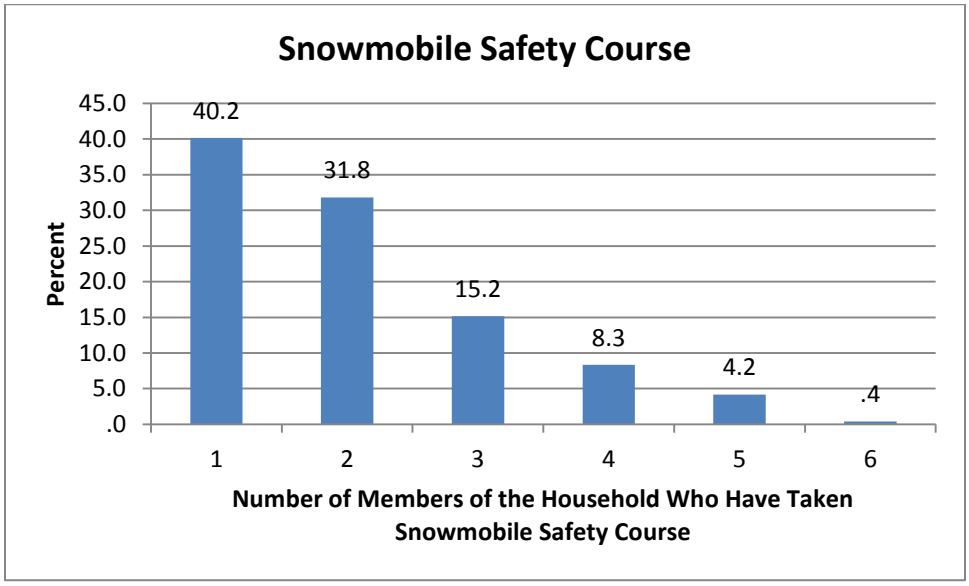
	Excellent	Good	Fair	Poor
Overall safety on trails in NYS	25.6	65.5	8.4	0.5
Identification of hazards on trails in NYS	26.3	60.5	12.1	1.2
Overall trail system in NYS	24.3	61.5	12.7	1.5
Signage on trails in NYS	24.1	55.9	16.9	3.1
Trail grooming in NYS	17.0	52.4	25.8	4.8
Information about trail conditions 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 the majority of the respondents rated all of the measures at least "Good" on the ratings scale.

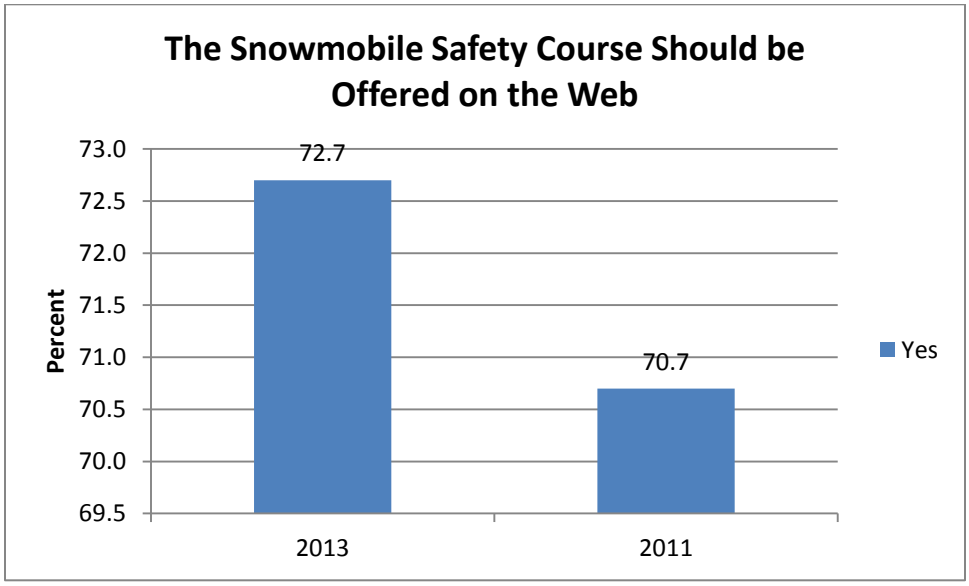


Part IV: Snowmobile Regulations and Trail Maintenance Fees

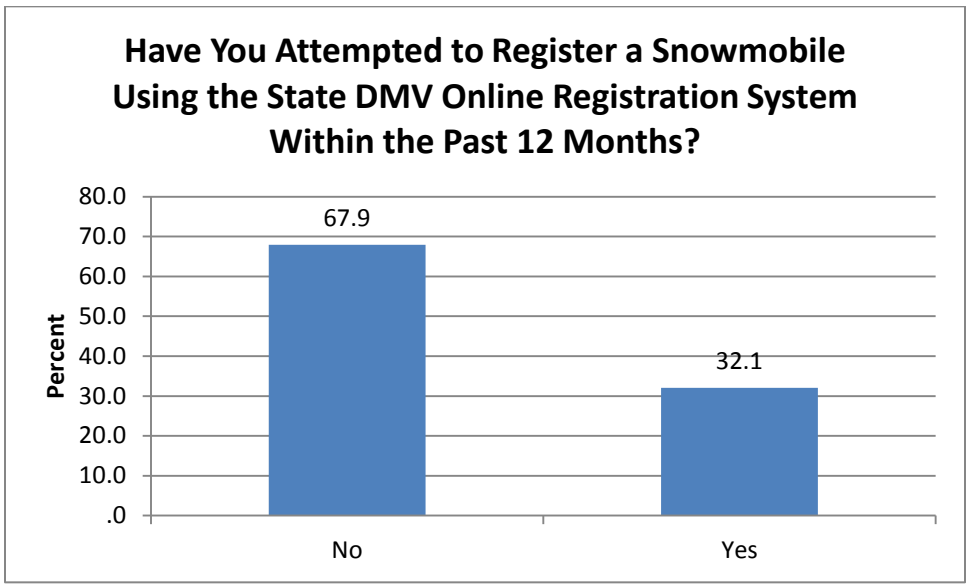
Approximately fifty-two percent (51.8%) of the 2013 survey respondents reported that at least one member in the family has taken the snowmobile safety course, compared with fifty-five percent (55%) of the 2011 survey respondents. Of those who responded in 2013, the largest percentage indicated one member of their family had completed the course.



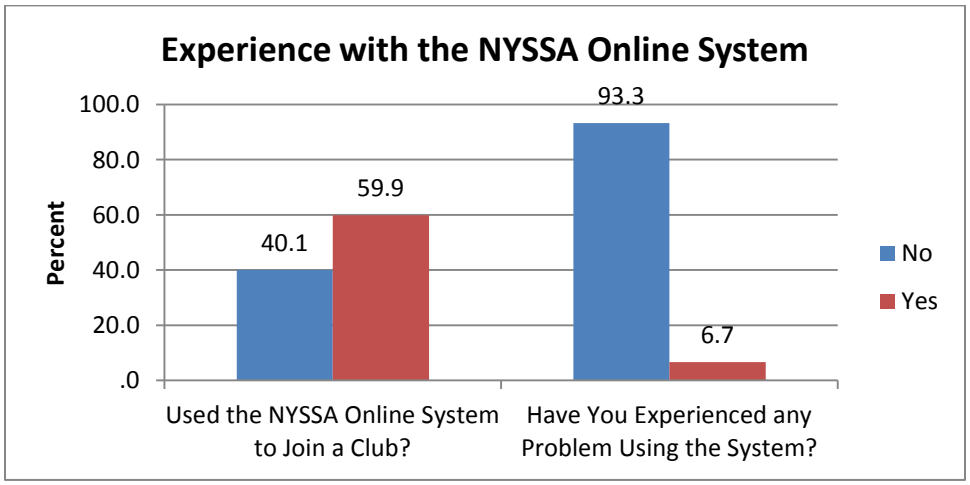
More than seventy-two percent (72.7%) of the respondents from the 2013 survey group reported that they would like the snowmobile safety course to be available over the Internet, compared with, approximately, seventy-one percent (70.7%) of the 2011 survey group.



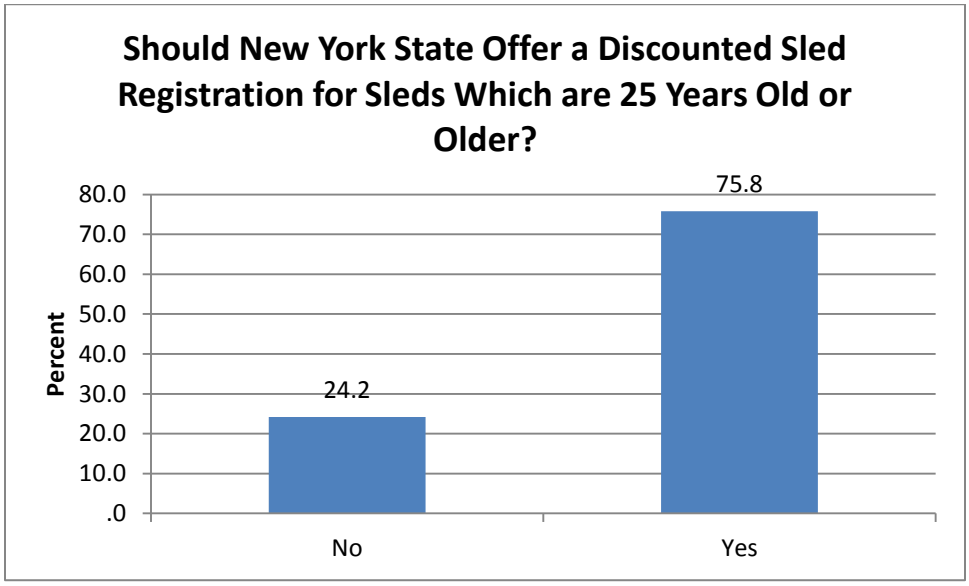
Since the 2011 Snowmobile Owner's Survey was conducted, the New York State Department of Motor Vehicles (DMV) implemented an online registration system for snowmobiles. Almost one third (32.1%) of the 2013 survey respondents indicated that they had attempted to use the online registration system for their snowmobile.



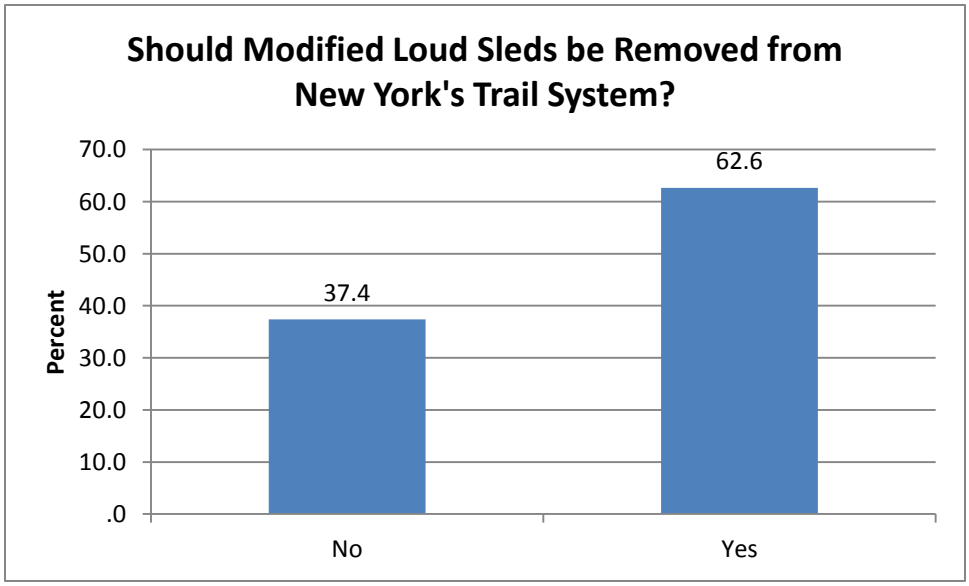
The New York State Snowmobile Association (NYSSA) has an online system which allows snowmobile owners to join a snowmobile club. Almost sixty percent (59.9%) of the 2013 respondents reported that they have used this method to join a club. Of those who have used the online system, over ninety-three percent (93.3%) reported no problems.



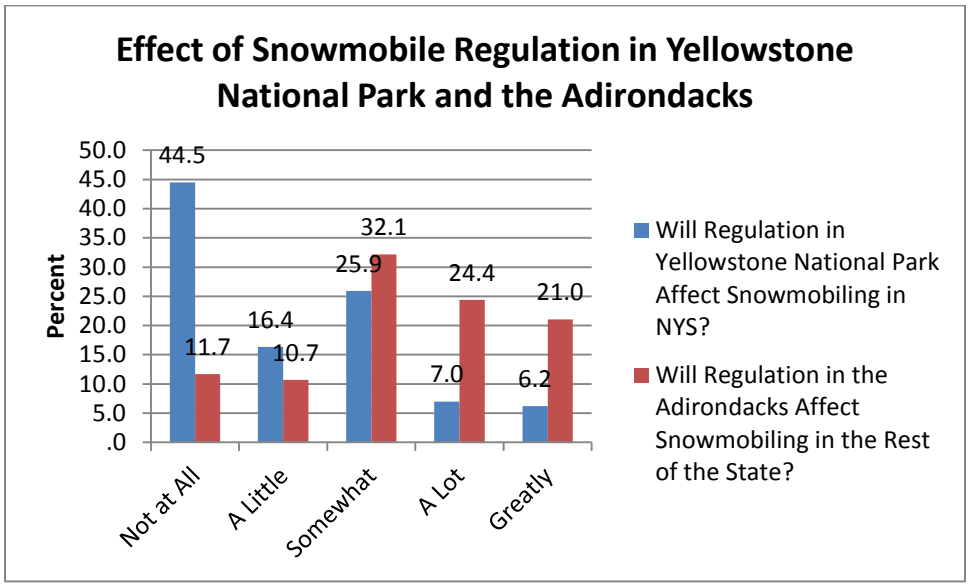
The 2013 Snowmobile Owners were asked if they believe that New York State should offer a discounted registration for snowmobiles twenty-five years old or older, otherwise known as vintage snowmobiles. Over seventy-five percent (75.8%) of the respondents were in favor of a discounted registration for vintage snowmobiles.



Approximately sixty-three percent (62.6%) of the respondents to the 2013 Snowmobile Owners survey believe that modified loud sleds should be removed from New York's trail system.

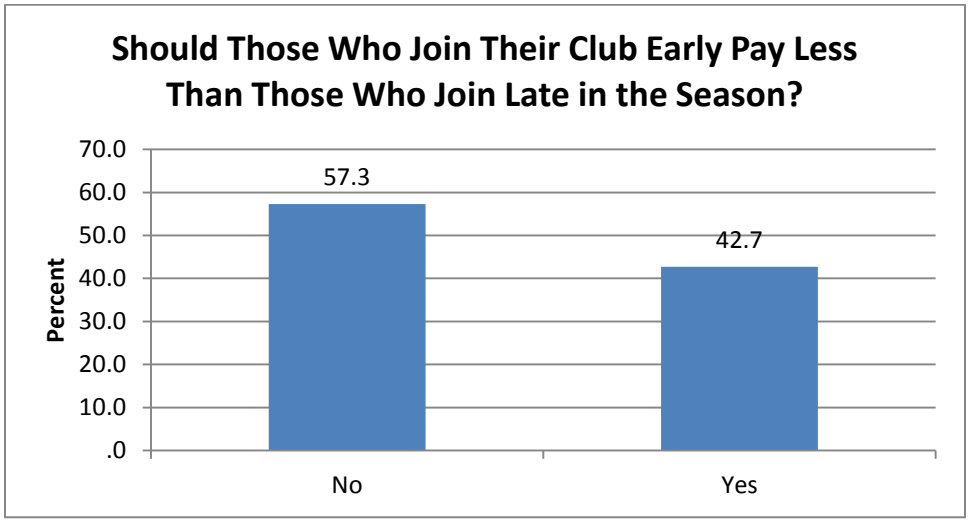


Approximately thirteen percent (13.2%) of the respondents of the 2013 Owner's survey reported a strong (defined as "A Lot" or "Greatly) effect on snowmobiling in New York State as a result of regulation of snowmobiling in Yellowstone National Park, located in the western states of Wyoming, Montana and Idaho. In contrast, over forty-five percent (45.4%) reported that regulation of snowmobiling in the Adirondacks will have a strong (defined as "A Lot" or "Greatly) effect in the rest of New York State.

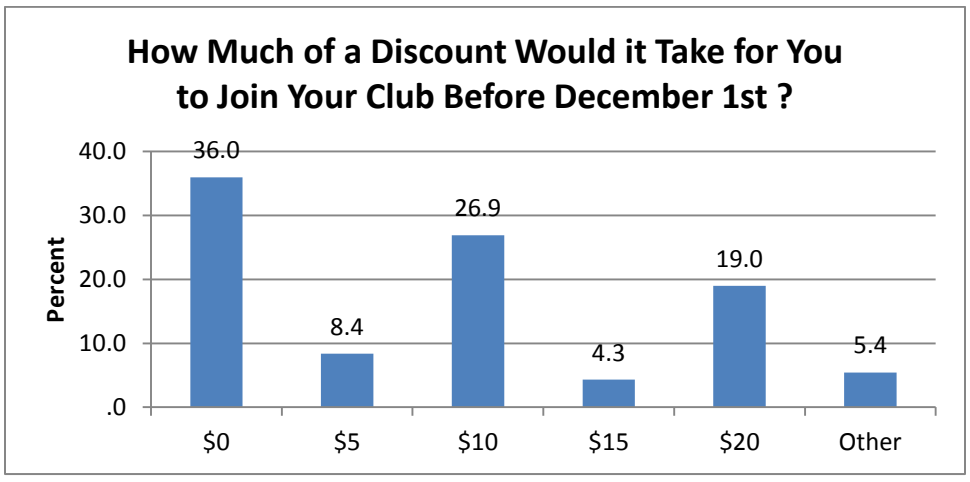


Approximately ninety-five percent (94.5%) of the 2013 survey respondents reported membership with a snowmobile club, as compared with, approximately, ninety-one percent (91%) of the 2011 survey respondents. Membership in a club entitled the snowmobile owner to a reduced registration fee for each snowmobile, 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.

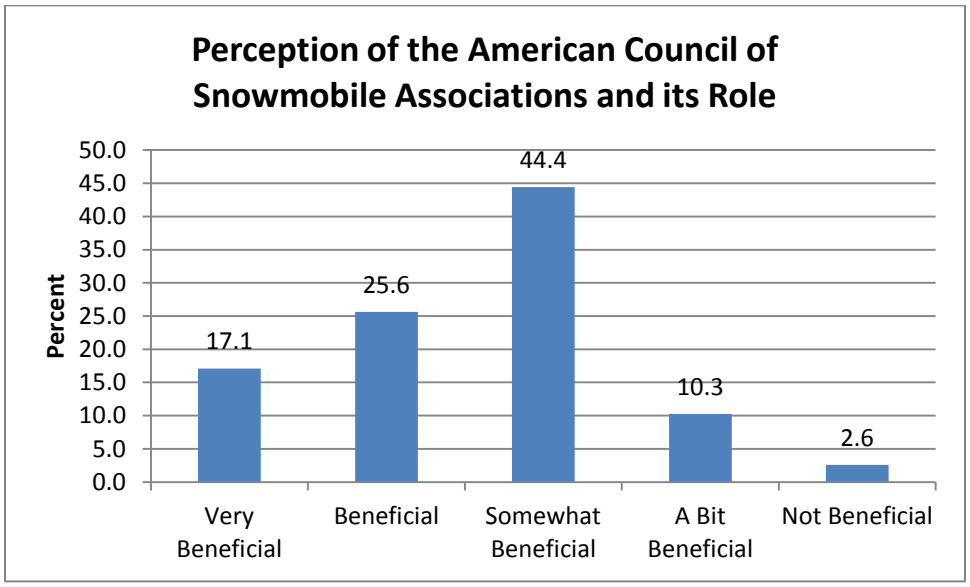
Approximately fifty-seven percent (57.3%) of the 2013 respondents reported that club members who joined early should not pay less than those who join late in the season.



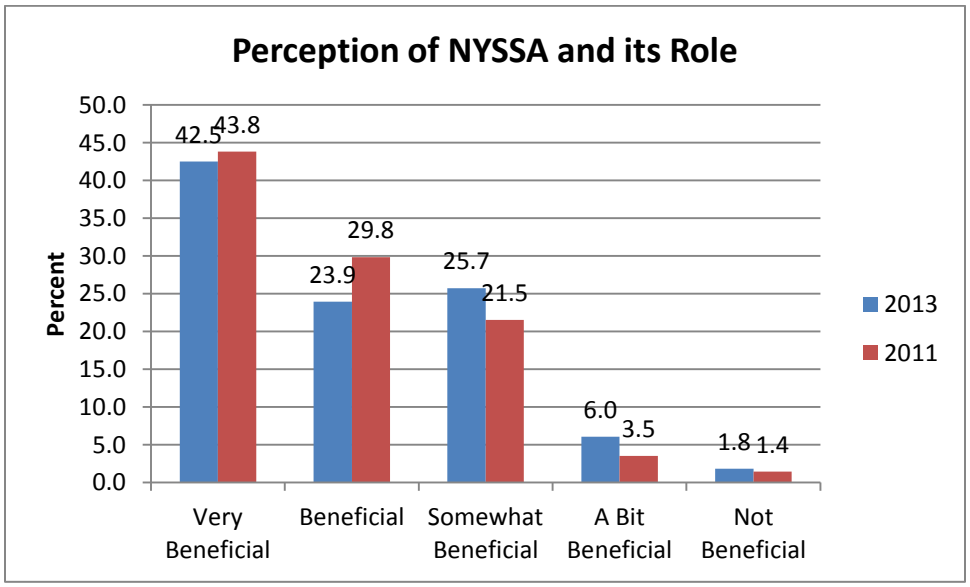
Thirty-six percent (36%) of the 2013 survey respondents said that they did not need any discount to join their snowmobile club before December 1st. Approximately twenty-seven percent (26.9%) reported that they would join before December 1st if there was a ten dollar ($10) discount.



Approximately thirty percent (29.5%) of the 2013 respondents reported that they had previously heard of the American Council of Snowmobile Associations. Approximately eighty-seven percent (87.1%) of the respondents who had heard of the organization reported that their perception of the Council and the role that it plays is at least "Somewhat Beneficial".



Approximately ninety-four percent (93.6%) of the 2013 survey respondents reported that they had heard about the New York State Snowmobile Association (NYSSA), compared to ninety-six percent of the 2011 survey respondents. Approximately sixty-six percent (66.4%) of the 2013 survey respondents who had heard of the NYSSA reported that their perception of the organization and the role it plays is at least "beneficial" compared to over seventy-three percent (73.6%) of the 2011 survey respondents.



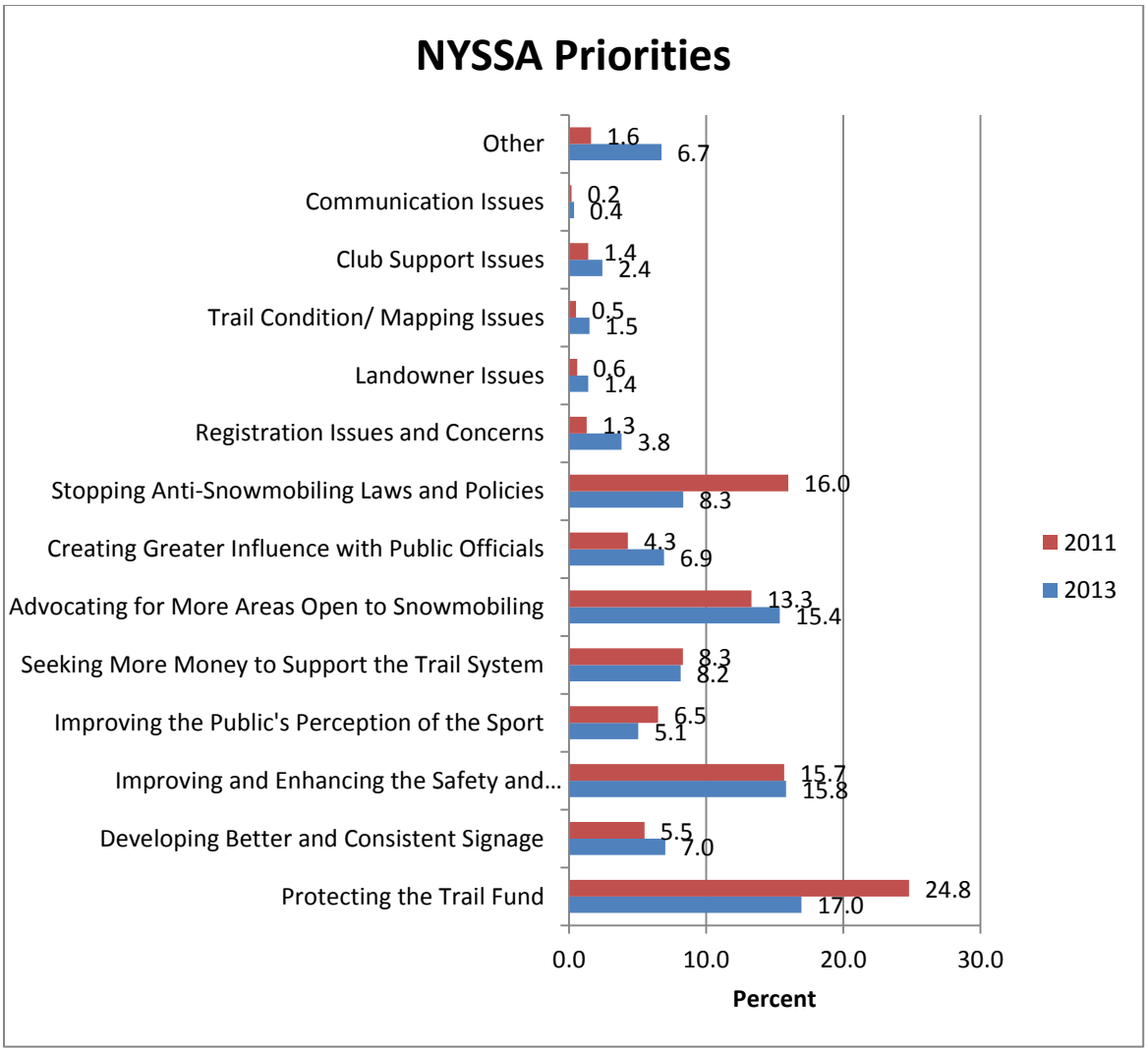
Part V: Promoting Snowmobiling in New York State

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.

From the 2011 survey respondents, the highest priority identified by a wide margin was "protecting the trail fund". In 2013, "protecting the trail fund" was still the highest priority based upon the percentage (17.0%) of respondents listing it as one of the top three priorities, but it was closely followed by "improving and enhancing the safety and enjoyment of the trail system (15.8%) and "advocating for more areas open to snowmobiling" (15.4%).


NYSSA Priorities
Other
Communication Issues
Club Support Issues
Trail Condition/ Mapping Issues
Landowner Issues
Registration Issues and Concerns
Stopping Anti-Snowmobiling Laws and Policies
Creating Greater Influence with Public Officials
Advocating for More Areas Open to Snowmobiling
Seeking More Money to Support the Trail System
Improving the Public's Perception of the Sport
Improving and Enhancing the Safety and...
Developing Better and Consistent Signage
Protecting the Trail Fund
1.6
6.7
0.2
0.4
1.4
2.4
0.5
1.5
0.6
1.4
1.3
3.8
16.0
8.3
4.3
6.9
13.3
15.4
8.3
8.2
6.5
5.1
15.7
15.8
5.5
7.0
24.8
17.0
0.0
10.0
20.0
30.0
Percent
2011
2013

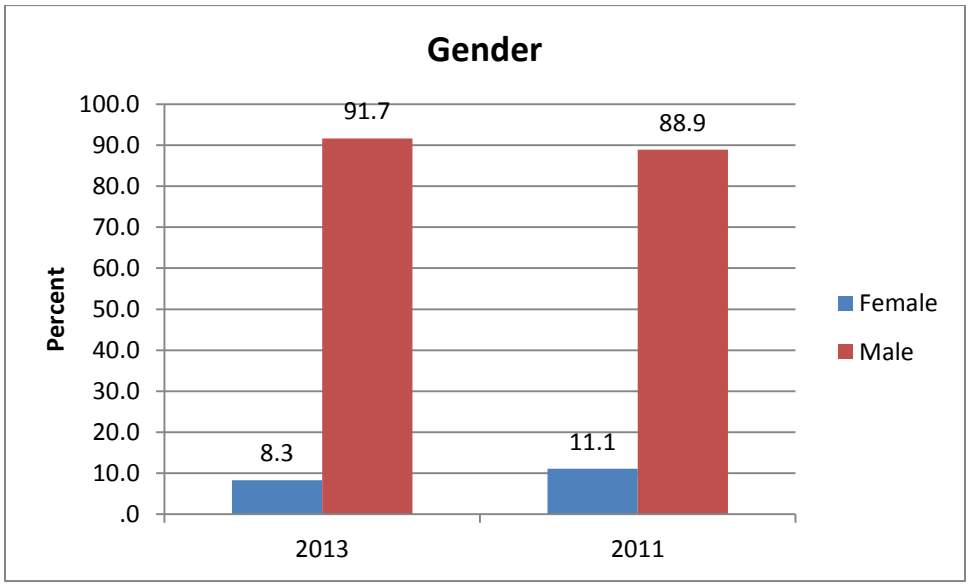
Part VI: General Information

The average age of the 2013 survey respondents was 51.07 years, as compared with 48.42 years for the 2011 group of survey respondents. The most frequent (mode) age of the respondents of both groups was 50 years old.

How old are you?

	2013 Survey	2011 Survey
Count	525	1203
Mean (Average)	51.07	48.42
Median	51	49
Mode	50	50

Approximately ninety-two percent (91.7%) of the 2013 survey group responding to the survey were male, compared with eighty-nine percent (88.9%) of the 2011 survey group

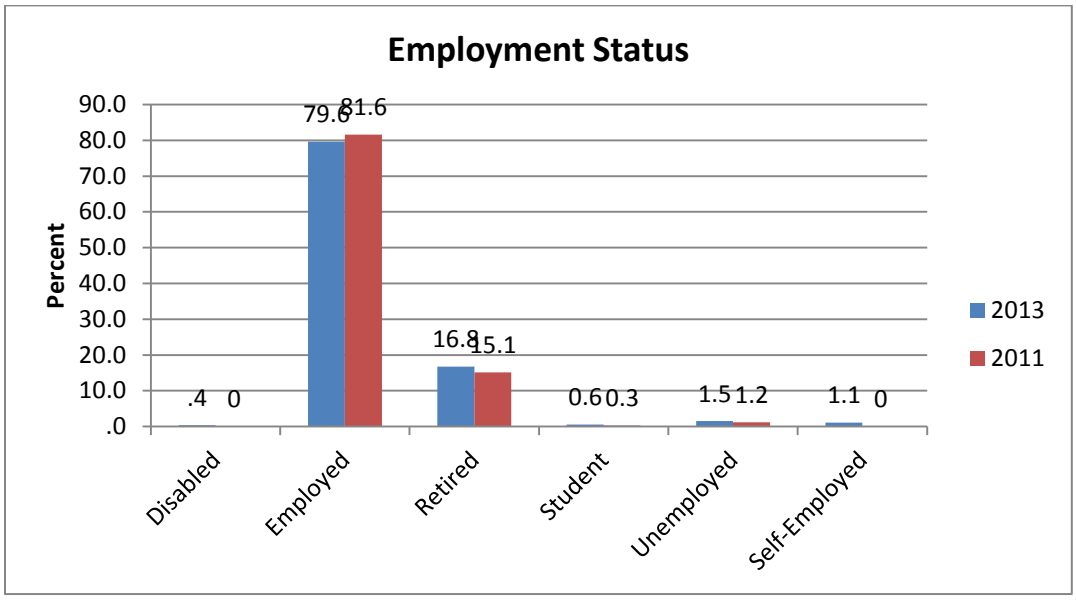


On average, respondents from the 2013 survey group reported that there were slightly under three people in their household compared to the 2011 survey group which had slightly over three people in their household, with two as the most frequent (mode) number of household members.

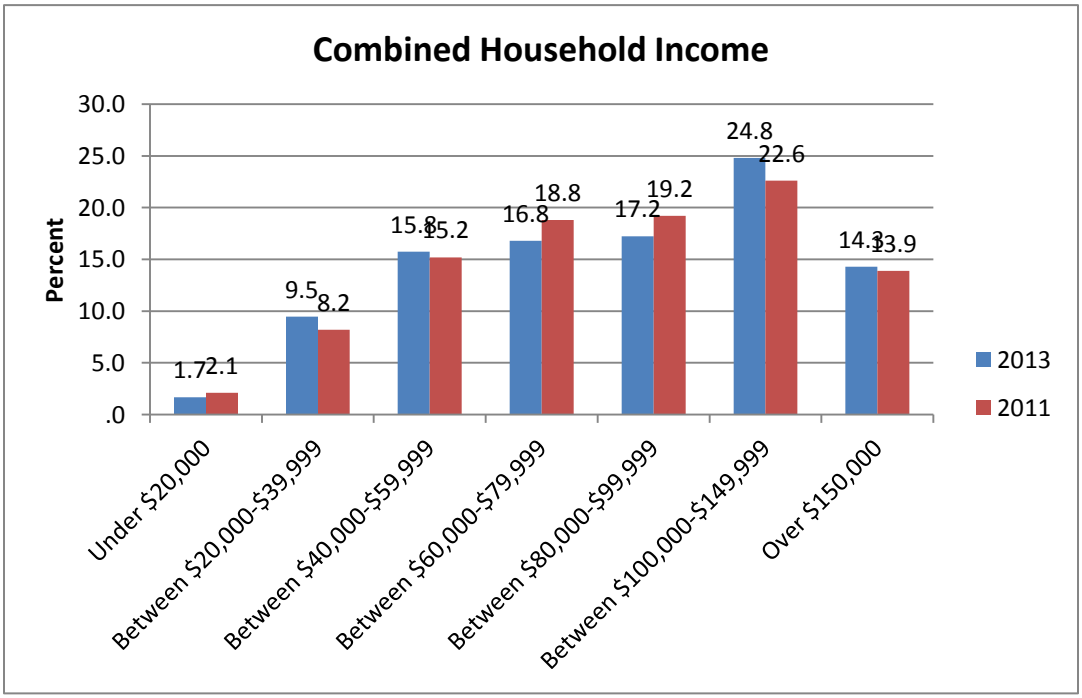
How Many People Are in Your Household?

	2013 Survey	2011 Survey
Number	523	1185
Mean (Average)	2.97	3.11
Median	3	3
Mode	2	2

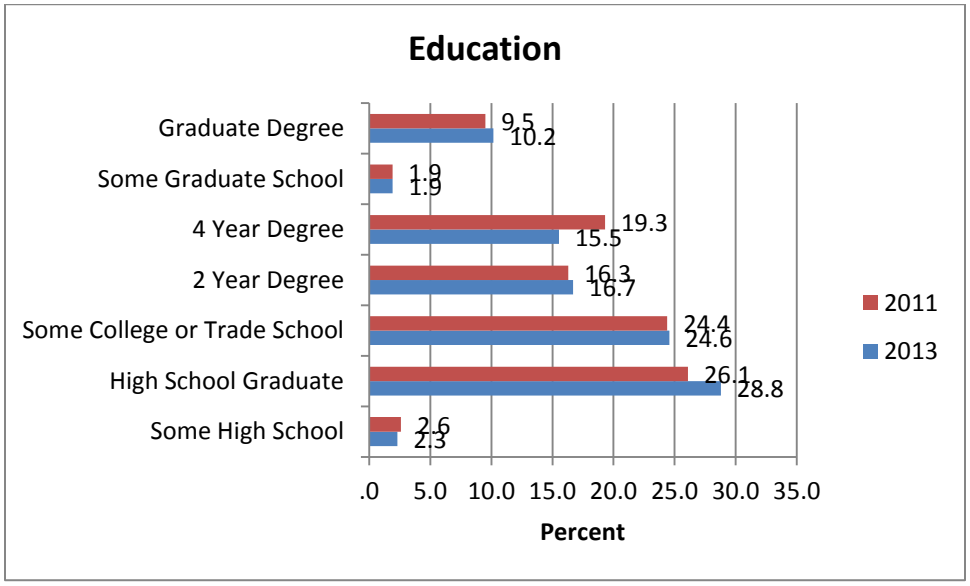
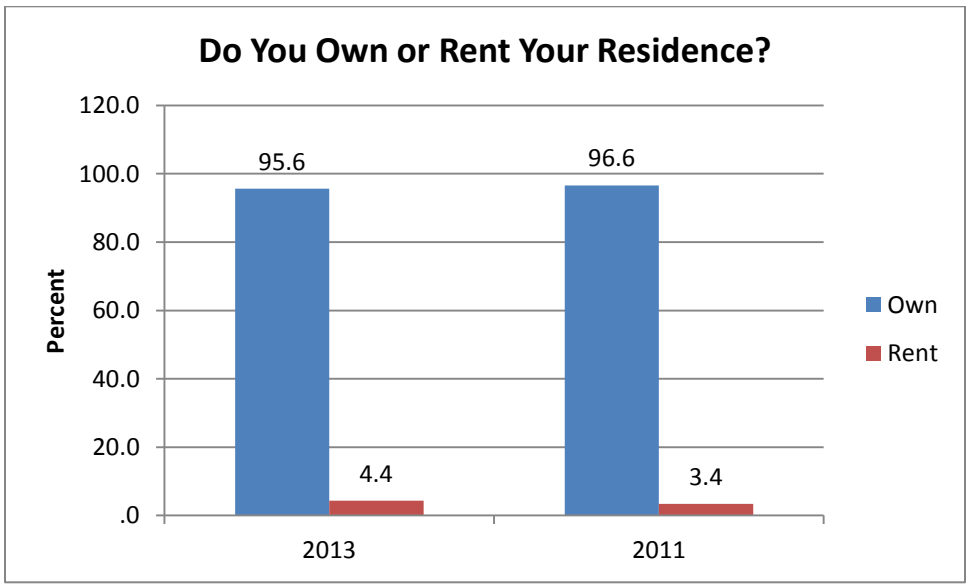
Approximately eighty percent (79.6%) of the 2013 survey group reported employed status, compared with, approximately, eighty-two percent (81.6%) of the respondents in the 2011 survey group. Approximately seventeen percent (16.8%) of the 2013 survey group and fifteen percent (15.1%) of the 2011 survey 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 (2013 survey group – 56.3% and 2011 survey group – 55.7%) reported combined household income greater than $80,000.



The largest percentage of both survey groups (2013 survey group - 28.8% and 2011 survey group – 26.1%) reported that their highest level of education was high school. Over sixty-eight percent of both groups (2013 survey group – 68.9% and 2011 survey group – 71.4%) reported at least some college or trade school education.



Approximately ninety-six percent (95.6%) of the 2013 survey group and approximately ninety-seven percent (96.6%) of the 2011 survey group reported that they own their residence.