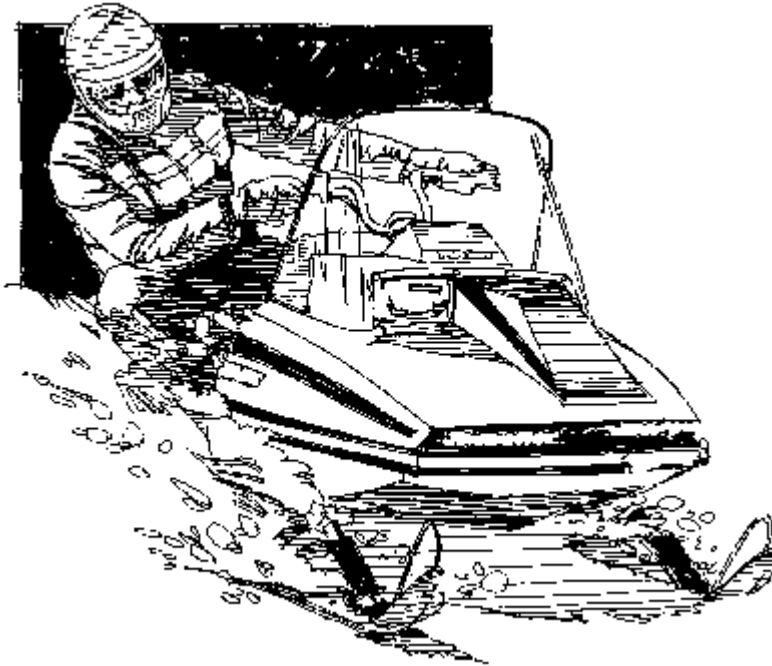


**RESULTS FROM
2000-2001 WYOMING SNOWMOBILE SURVEY:
EXECUTIVE SUMMARY**



**Prepared for the Wyoming Department of State Parks and Historic Sites, Wyoming
State Trails Program.**

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Sponsored and Supported By:

**The Wyoming Department of State Parks and Historic Sites,
The University of Wyoming,
And
The Wyoming State Snowmobile Association**

October 2001

WYOMING SNOWMOBILE EXECUTIVE SUMMARY

This report is a summary of the results from the 2000-2001 Wyoming Snowmobile survey. It combines the information from individual reports on three types of snowmobilers in Wyoming - nonresidents, residents and snowmobile outfitter clients. It is intended to illustrate the similarities and differences between Wyoming snowmobile trail user groups. Comprehensive, in-depth discussions of each of the groups can be found in their respective reports. However, this document is simply a combination and summary of these other reports to assist in comparisons between the Wyoming snowmobile trail users. The reader should consult the other individual reports for more detailed information on a specific snowmobile group.

Survey Results

General Season Information

Table 1 indicates that residents and nonresidents are generally more experienced snowmobilers than outfitter clients. Residents were expectedly the most experienced in Wyoming snowmobiling, averaging 15.1 years experience snowmobiling in Wyoming.

Table 1. Number of Years Snowmobiling

	Total Snowmobiling Years	WY Snowmobiling Years
Outfitter Clients	9.5	3.0
Resident	16.5	15.1
Nonresident	16.6	6.5

Table 2 shows that residents tend to own more snowmobiles than the other groups, averaging 2.6 snowmobiles per household. Outfitter clients owned the least number of snowmobiles, averaging 0.6 snowmobiles per household. Seventy percent of

outfitter clients did not own any snowmobiles. This is expected since not owning a snowmobile is a probably a primary reason for using the services of a snowmobile outfitter. Nonresidents averaged 2.4 snowmobiles.

Table 2. Number of Snowmobiles Currently Owned

	Total Snowmobiles Owned
Outfitter Clients	0.6
Resident	2.6
Nonresident	2.4

Table 3 illustrates when trail users snowmobiled in Wyoming. Each group varied in choosing their snowmobile days. Outfitter clients snowmobiled mainly during normal weekdays, with 61.9 percent of this group snowmobiling during this time, while 54.4 percent of residents snowmobiled during normal weekend days, and 50.0 percent of nonresidents snowmobiling during normal weekdays.

Table 3. Snowmobiling Days

	Weekend Days	Weekdays	Holidays
Outfitter Clients	33.3%	61.9%	4.8%
Resident	54.4%	30.8%	14.8%
Nonresident	42.0%	50.0%	8.0%

Table 4 indicates that each user group traveled varying distances to snowmobile during the season. This is to be expected given the origin of each type of respondent. Not surprisingly, outfitter clients seemed to have traveled the farthest, with 61.3 percent having traveled over 1,000 miles to snowmobile during the season. Nonresidents also traveled relatively far, with 22 percent of them traveling over 1,000 miles to snowmobile during the season. On the other hand, nearly two-thirds of residents traveled less than 200 miles to snowmobile during the season.

Table 4. Maximum Distance Traveled to Snowmobile (one-way miles)

	< 100	100-200	201-300	301-400	401-500	501-600	601-700	701-800	801-900	901-1000	>1000
Outfitter Clients	9.7%	2.9%	2.9%	1.8%	3.2%	2.9%	0.4%	2.5%	5.4%	6.9%	61.3%
Resident	37.2%	29.2%	14.1%	10.1%	3.4%	2.2%	1.0%	1.0%	0.0%	0.2%	1.6%
Nonresident	3.8%	13.1%	9.1%	6.1%	6.6%	9.1%	5.1%	9.0%	7.7%	8.4%	22.0%

Table 5 indicates that the vast majority of resident and nonresident snowmobilers were either satisfied or very satisfied with Wyoming snowmobile opportunities. Only 4.4 percent of resident snowmobilers and 3.3 percent of nonresidents said they were either dissatisfied or very dissatisfied with their Wyoming snowmobile experience. Outfitter clients were asked a similar question, however it was worded differently and thus was not included in this comparison table.

Table 5. Overall Satisfaction with Wyoming Snowmobiling

	Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied
Resident	52.0%	43.6%	2.4%	2.0%
Nonresident	66.2%	30.5%	1.7%	1.6%

Table 6 indicates that Wyoming snowmobile trail users are fairly split on the issue of cleaner, quieter snowmobiles. More resident and nonresident users felt that there *was not* a need for a cleaner, quieter snowmobile, with 50 percent and 61.9 percent stating this. In contrast, over 50 percent (56 percent) of outfitter clients felt that there *was* a need for this type of snowmobile.

Table 6. Need for a Cleaner, Quieter Snowmobile

	Yes	No	Don't Know
Outfitter Client	56.0%	26.3%	17.7%
Resident	39.4%	50.0%	10.6%
Nonresident	28.2%	61.9%	9.9%

Table 7 shows that most of the Wyoming snowmobile trail users are willing to pay more to use cleaner, quieter snowmobiles. Over half of residents and nonresidents

(50.2 percent and 50.5 percent, respectively) said they would be willing to pay more to use these machines. However, more outfitter clients (64.4 percent) said they would be willing to pay a higher price to use cleaner, quieter snowmobiles.

Table 7. Willingness to Pay More to Use a Cleaner, Quieter Snowmobile if Readily Available

	Yes	No
Outfitter Client	64.4%	35.6%
Resident	50.2%	49.8%
Nonresident	50.5%	49.5%

Seasonal Trip Information

Table 8 shows that residents were the heaviest users of the snowmobile trails in Wyoming last season, averaging 14.5 trips and 19.0 days per respondent. Nonresidents were next averaging 4.3 trips and 10.8 days, followed by outfitter clients averaging 1.9 trips and 3.9 days. Residents and nonresidents both said that they used the Snowy Range trail system the most, while outfitter clients used Yellowstone National Park the most.

Table 8. Number of Snowmobile Trips and Days During 2000-2001 Season

	WY Trips	WY Days	Highest Use Area
Outfitter Client	1.9	3.9	YNP
Resident	14.5	19.0	Snowy Range
Nonresident	4.3	10.8	Snowy Range

Table 9 indicates that most Wyoming snowmobile trail users had made a snowmobile trip to Yellowstone National Park at some point in their lives. Outfitter clients reported the highest visitation, with 79.3 percent saying they had visited Yellowstone. Only about 20 percent of outfitter clients had not made a snowmobile trip to Yellowstone.

Table 9. Had Taken Snowmobile Trips to Yellowstone National Park

	Yes	No
Outfitter Client	79.3%	20.7%
Resident	58.9%	41.1%
Nonresident	54.2%	45.8%

Table 10 suggests that outfitter clients would make the most changes of all the Wyoming snowmobile trail user groups should the Yellowstone National Park snowmobile ban take effect, with 56.7 percent saying they would change their number of trips to Wyoming. Nonresidents and residents would also be affected, although the number of snowmobilers saying they would change their trips was lower amongst these categories, with 24.5 percent of residents and 34.7 percent of nonresidents saying they would change the number of their snowmobiling trips if a ban were to take effect.

Table 10. Would Change Number of Winter Trips to Wyoming if No Longer Able to Snowmobile in GTNP or YNP

	Yes	No
Outfitter Client	56.7%	43.3%
Resident	24.5%	75.5%
Nonresident	34.7%	65.3%

Table 11 indicates *how* trips would change for those that responded with “Yes” in Table 10. Most of the snowmobilers said they would decrease their snowmobile trips if snowmobiling were no longer allowed in the national parks (95.4% for outfitter clients, 92.1% for nonresidents, and 81.1% for residents). Overall, outfitter clients indicated that they would decrease their snowmobile trips to Wyoming by 52.3 percent and their snowmobiling days in Wyoming by 45.5 percent. Overall, residents indicated that they would decrease their snowmobiling trips in Wyoming by 5.0 percent and their snowmobiling days in Wyoming by 8.6 percent. Overall, nonresidents indicated that

they would decrease their snowmobiling trips in Wyoming by 10.4 percent and their snowmobiling days in Wyoming by 13.3 percent.

Table 11. Change in Trips if Snowmobiling Not Allowed in GTNP or YNP

	Increase	Decrease	WY Trips	WY Days
Outfitter Client	4.6%	95.4%	-52.3%	-45.5%
Resident	18.9%	81.1%	-5.0%	-8.6%
Nonresident	7.9%	92.1%	-10.4%	-13.3%

Table 12 suggests a strong response with the vast majority of Wyoming snowmobile trail users saying they would not consider going to Yellowstone National Park if their only mechanized access were by snow coach tours. Nearly 85 percent of outfitter clients, over 90 percent of residents, and over 90 percent of nonresidents said they would not consider using snow coaches to access Yellowstone in the winter.

Table 12. Would Consider Going to YNP if Only Mechanized Winter Access was by Snow Coach Tours

	Yes	No
Outfitter Client	15.4%	84.6%
Resident	8.8%	91.2%
Nonresident	6.8%	93.2%

Specific Information on Most Recent Trip

Table 13 indicates that the most heavily used trail areas by Wyoming snowmobile trail users were the Snowy Range, Yellowstone National Park, Togwotee, and the Northern Bighorns during the last snowmobile season. Residents and nonresidents seemed to have similar usage patterns focusing on the Snowy Range and the Northern Bighorns, while outfitter clients focused their usage in the northwestern portion of Wyoming, particularly Yellowstone and Togwotee.

Table 13. Most Recent Trip Snowmobile Area

	First Use Area	Second Use Area
Outfitter Client	YNP	Togwotee
Resident	Snowy Range	North Bighorns
Nonresident	Snowy Range	North Bighorns

Table 14 indicates that the user group with the largest traveling party size was the outfitter clients, with 9.3 people per party. Also, they had the least amount of passenger vehicles, with only 1.2 vehicles. Residents had the smallest traveling party size, with 5.0 people per group and 2.0 passenger vehicles to transport them. Nonresidents averaged 8.5 people per traveling party and 2.8 passenger vehicles. All user groups had about one sled per person, aside from the outfitter clients who indicated that they had more double riders, with 8.3 sleds for the 9.3 people in the traveling party. In some cases outfitter clients may have been reporting the number of people that went on the tour rather than the number in their traveling party.

Table 14. Traveling Party Characteristics

	People in Party	Passenger Vehicles	Snowmobiles
Outfitter Client	9.3	1.2	8.3
Resident	5.0	2.0	4.7
Nonresident	8.5	2.8	8.5

Table 15 suggests that outfitter clients traveled the farthest for their last snowmobiling trip by traveling 1,106 miles. However, it is interesting to note that although outfitter clients reported traveling the farthest distance, nonresidents reported the longest traveling time for their mileage, with 10.6 hours and 631 miles, versus the outfitter client traveling time of 9.0 hours. This is likely due to outfitter clients traveling by airplane, whereas nonresidents were more likely to travel with their snowmachines and thus forced to drive to their Wyoming snowmobile destination.

Table 15. Travel Time and Distance

	Travel Time	Travel Distance
Outfitter Client	9.0 hours	1,106 miles
Resident	2.6 hours	98 miles
Nonresident	10.6 hours	631 miles

Table 16 shows that snowmobiling was the primary purpose of the most recent trip for the majority of all Wyoming snowmobile trail user groups. Over 78 percent of outfitter clients, 89.0 percent of residents, and 97 percent of nonresidents indicated that snowmobiling was their primary purpose for traveling to Wyoming during their most recent trip.

Table 16. Was Snowmobiling Primary Purpose?

	Yes	No
Outfitter Client	78.5%	21.5%
Resident	89.0%	11.0%
Nonresident	97.3%	2.7%

Table 17 indicates how long each user group stayed in Wyoming and how many days they snowmobiled in the state. Outfitter clients generally had the longest stays in Wyoming, with 5.5 nights and 6.1 days in the state. This user group spent 3.5 days snowmobiling. Nonresidents stayed around 4.0 nights and 4.5 days in Wyoming, while snowmobiling 4.1 days. Residents obviously reported the shortest trips during their last snowmobiling trips because they most likely are located close enough to a Wyoming snowmobile trail area to merit only a one or two-day trip (1.2 nights and 2.1 days).

Table 17. Most Recent Snowmobile Trip Length

	Total Nights	Total WY Nights	Total WY Days	Total Snowmobiling Days
Outfitter Client	6.5	5.5	6.1	3.5
Resident	1.1	1.2	2.1	2.0
Nonresident	4.9	4.0	4.5	4.1

Table 18 shows the average usage that snowmobilers placed on the Wyoming trail system during their last snowmobile trip to the state. Nonresident snowmobilers reported the most hours out on the trail system, with 7.5 hours per day and traveling 83.8 miles. Nonresidents also reported purchasing the most gasoline for their machines, with 13.0 gallons per day. However, outfitter clients reported the most mileage traveled, with 92.0 miles per day and only 6.8 hours per day on the snowmobile and purchasing 11.6 gallons per day. Resident usage was not substantially different from the other two user groups, with 5.8 hours per day snowmobiling, traveling 69.7 miles, and purchasing 11.2 gallons of gas for their snowmobiles.

Table 18. Daily Snowmobile Hours, Miles, and Gas Purchases

	Daily Snowmobile Hours	Daily Snowmobile Miles	Daily Snowmobile Gas
Outfitter Client	6.8	92.0	11.6 gallons
Resident	5.8	69.7	11.2 gallons
Nonresident	7.5	83.8	13.0 gallons

Yellowstone National Park Snowmobile Ban Opinion Questions

Table 19 illustrates that a vast majority of Wyoming snowmobilers are aware of the issues surrounding the Yellowstone National Park snowmobile ban. Most outfitter clients (86.5 percent), residents (95.9 percent), and nonresidents (91.4 percent), reported being aware of these issues.

Table 19. Aware of Issues Surrounding YNP Snowmobile Ban?

	Yes	No
Outfitter Client	86.5%	13.5%
Resident	95.9%	4.1%
Nonresident	91.4%	8.6%

Table 20 shows that the majority of all Wyoming snowmobile trail users felt that the decision to ban snowmobiles in Yellowstone National Park was *not fair*. A few had no opinion on the issue (6.8 percent of outfitter clients, 5.9 percent of residents, and 6.8 percent of nonresidents).

Table 20. Was the NPS Decision to Ban Snowmobiles Fair?

	Yes	No	No Opinion
Outfitter Client	9.7%	83.5%	6.8%
Resident	4.7%	89.4%	5.9%
Nonresident	4.4%	88.8%	6.8%

Table 21 indicates that most Wyoming snowmobilers extended their concern to the future of the snowmobile trails systems outside of Yellowstone. The majority of nonresidents (87.6 percent), residents (86.0 percent), and outfitter clients (61.6 percent) stated that they are concerned about the future of the Wyoming snowmobile trails system outside of Yellowstone National Park.

Table 21. Concerned About Future of Trail Systems Outside of YNP?

	Yes	No
Outfitter Client	61.6%	38.4%
Resident	86.0%	14.0%
Nonresident	87.6%	12.4%

Table 22 indicates the preferred solution of Wyoming snowmobile trail users for snowmobile conflicts in national parks. The most popular alternative for outfitter clients and residents was to have no ban in effect, but to instead have a requirement for cleaner, quieter snowmobiles. Nonresidents preferred no ban and no additional requirements in place.

Table 22. Preferred Solution for Snowmobile Conflict in National Parks

	Most Preferred Solution
Outfitter Client	Cleaner, Quieter Machine Requirement
Resident	Cleaner, Quieter Machine Requirement
Nonresident	No Ban or Other Requirements

Table 23 indicates why user groups come to Wyoming to snowmobile. Outfitter clients said they primarily base their trail choices on the scenery available and the reputation of the snowmobiling experience that a particular Wyoming area has. Residents and nonresidents said they primarily choose their trail areas based on snow conditions and the amount of off-trail powder available.

Table 23. Most Preferred Snowmobile Trail Characteristics

	Main Factor	Second Main Factor
Outfitter Client	Scenery	Reputation
Resident	Snow Conditions	Off-Trail Powder
Nonresident	Snow Conditions	Off-Trail Powder

Wyoming Snowmobiler Characteristics

Table 24 indicates that most frequent origins of the outfitter clients were Michigan and Pennsylvania. The most frequent origin of nonresidents was Minnesota. The most frequent origin of Wyoming residents who snowmobile in the state was Natrona County.

Table 24. Origin of Wyoming Snowmobile Trail Users

	Most Origin	Second Most Origin
Outfitter Client	MI and PA	WY
Resident	Natrona County	Fremont County
Nonresident	MN	CO

Table 25 gives some basic information about Wyoming snowmobile trail users, and there are many similarities between the groups. Most users (regardless of whether

they are outfitter clients, residents, or nonresidents) are males between the ages of 36 and 50 years old and work full-time. The main characteristics that separate user groups were the levels of education level (outfitter clients most frequently had obtained college degrees, residents most frequently had some college, while nonresidents most frequently had finished high) and the levels of income (outfitter clients had a large percentage who earned over \$100,000 whereas residents and nonresidents both most frequently earned incomes in the \$50,000 to \$74,999 range).

Table 25. Wyoming Snowmobiler Characteristics

	Gender	Age	Education	Employment	Work Outside Home	Income
Outfitter Client	Male (70.3%)	36-50 years	College Degree	Full-Time	1.4	> \$100,000
Resident	Male (91.6%)	36-50 years	Some College	Full-Time	1.6	\$50,000-\$74,999
Nonresident	Male (92.4%)	36-50 years	High School	Full-Time	1.6	\$50,000-\$74,999

Economic Impact of Snowmobiling in Wyoming.

Table 26 summarizes the economic impact of snowmobiling in Wyoming. Daily per person trip expenditures in Wyoming ranged from \$180.27 for outfitter clients to \$98.99 for nonresidents and \$68.50 for residents. Annual equipment expenditures in Wyoming ranged from \$2,306.13 for residents to \$329.94 for nonresidents, and \$64.11 for outfitter clients.

In terms of total spending associated with snowmobiling, nonresidents, residents, and outfitter client were estimated to have spent a total of \$234.3 million in Wyoming during the 2000-2001 season. Of this amount about 40 percent was from nonresidents, 40 percent was from residents, and nearly 20 percent was from outfitter clients. Based on

survey results regarding the reduction in snowmobiling days in Wyoming it is estimate that the banning of snowmobiles in Yellowstone and Grand Teton National Parks could decrease snowmobile expenditures in Wyoming by up to \$36.8 million dollars. Over one-half of this loss would be from reduced outfitter client expenditures, which are concentrated in northwest Wyoming. Decreases in nonresident expenditures represent about 35 percent of the loss and decreases in resident expenditures represent slightly more than 12 percent of the loss. To some extent, the loss of resident snowmobile expenditures may actually represent a shifting of this spending to other activities in the state.

Because nonresident and nonresident outfitter client spending represents new money to the Wyoming economy, it is appropriate to consider the economic impact of this spending on the state's economy. An IMPLAN model of the Wyoming economy was used to estimate the economic impact of the \$138.4 million of nonresident and nonresident outfitter client spending. It is estimated that this spending directly or secondarily supported over 3,800 jobs and generated over 50.2 million in labor income in the state. Based on survey results regarding the reduction in snowmobiling days in Wyoming it is estimate that the banning of snowmobiles in Yellowstone and Grand Teton National Parks could result in a loss of up to 938 jobs and \$11.8 million in labor income in the state.

Finally, snowmobiling is also a source of revenue for state and local governments in Wyoming. During the 2000-2001 season it is estimated that snowmobiling generated over \$10.0 million in government revenue. About 70 percent of this revenue is from sale tax, with about one-quarter from gas tax revenue, and five percent from user fees. It is

estimated that the banning of snowmobiles in Yellowstone and Grand Teton National Parks would decrease this government revenue by up to \$1.3 million.

Table 26. Summary of Economic Impact of Snowmobiling in Wyoming

<u>Expenditures</u>	<u>Daily/Person Trip (WY)</u>	<u>Annual Equip (WY)</u>	
Nonresident Expenditures	\$98.99	\$329.94	
Resident Expenditures	\$68.50	\$2,306.13	
Outfitter Client Expenditures	\$180.27	\$64.11	
	<u>Current Situation</u>	<u>With SMB Ban</u>	<u>Loss From Ban</u>
Nonresident Expenditures	\$97,594,577	\$84,614,498	\$12,980,079
Resident Expenditures	\$94,356,462	\$89,850,766	\$4,505,696
Outfitter Client Expenditures	\$42,357,571	\$23,084,876	\$19,272,695
Total Expenditures	\$234,308,610	\$197,550,140	\$36,758,470
<u>Economic Impact</u>			
Number of Jobs	3,817	2,879	938
Labor Income	\$50,246,068	\$38,446,073	\$11,799,995
<u>State and Local Government Revenue</u>			
Sales Tax Revenue	\$7,036,153	\$6,140,755	\$895,398
Gas Tax Revenue	\$2,463,123	\$2,126,885	\$336,238
Registration/Licensing Fees	\$540,088	\$483,833	\$56,255
Total Government Revenue	\$10,039,364	\$8,751,474	\$1,287,890

SUMMARY AND CONCLUSIONS

Outfitter clients, residents, and nonresidents all have an important impact on Wyoming snowmobiling. Each user group has its own unique characteristics, yet there are many areas where the groups are similar. This report provided some basic comparison points between each user group so that the entire Wyoming snowmobiling picture could be painted. This report will hopefully be a springboard for further analysis to be used for future Wyoming State Trails Program decision-making. The report also indicates the economic importance of snowmobiling in Wyoming and the potential

negative economic effects of banning snowmobiling in Yellowstone and Grand Teton National Parks.