UW-WHITEWATER • FISCAL & ECONOMIC RESEARCH CENTER

Snowmobiling in Wisconsin

The Story of a $1.477B Winter Economy

Presentation Companion to the Full Research Report | Conducted for the AWSC

$1.477B
TOTAL ECONOMIC OUTPUT

12,525
JOBS SUPPORTED

$507M
LABOR INCOME

$132M
ANNUAL TAX REVENUE

Dr. Russ Kashian, Director • FERC Research Team • 2026

A NOTE TO READERS

This Deck Tells the Story. The PDF Carries the Proof.

Two artifacts, two purposes — designed to work together.

📊 THIS PRESENTATION

The Story

- Simplified visual narrative for live audiences
- North/Central/South regional abstraction
- Key metrics, flows & takeaways in 15 slides
- Designed to be understood in seconds, not minutes
- Pattern recognition over data density

📄 COMPANION PDF REPORT

The Evidence

- Full 72-county choropleth maps with real geography
- Complete IMPLAN input-output methodology
- County-by-county data tables & appendices
- Detailed citations, references & footnotes
- Rigorous proof for the patterns shown here

An Essential Winter Economic Engine

The headline numbers behind Wisconsin's snowmobile economy.

Core Findings

- 25,000+ miles of groomed, interconnected trails statewide.
- 200,000+ registered snowmobiles — Wisconsin is the birthplace of the sport.
- Two-pillar model: Visitor Tourism ($1.125B) + Capital Equipment ($352M).
- 12,525 jobs supported across lodging, dining, retail & powersports.
- $132M in annual tax revenue — strong ROI on user-funded trail system.
- Winter tourism represents ~30–35% of the northern WI regional economy.*

$1.477B

TOTAL OUTPUT

Statewide economic activity

12,525

TOTAL JOBS

Direct + indirect + induced

$507M

LABOR INCOME

Avg blended wage $40,479

$132M

TAX REVENUE

$98M visitor + $34M equipment

*Grow North / WLUK FOX 11, Nov 17 2025 (T. Wartman).

The Riders Live South. The Spending Lands North.

One sentence that explains why snowmobiling is a statewide economic engine.

01

SOUTHERN RIDERS

Fewer local trails
Snow unreliable

200K+ registered snowmobiles concentrated in populated southern WI

02

TRAVEL NORTH

Overnight destination trips
to the Northwoods

Multi-day stays become the dominant travel pattern

03

SPEND IN NORTH

Lodging • Dining • Fuel
Retail • Entertainment

$1.125B visitor activity flows into northern county economies

THE ECONOMIC MECHANISM

A statewide population of riders transfers winter spending from populated southern counties into rural northern counties — stabilizing hospitality economies during the dormant season.

IMPLAN Input-Output Economic Modeling

Three-tier multiplier analysis captures the full economic footprint.

DIRECT

Initial Spending

Snowmobiler expenditures on fuel, lodging, meals, trail passes, equipment & apparel.

INDIRECT

Business-to-Business

Supplier purchases: hospitality supply chains, powersports distribution, maintenance services.

INDUCED

Household Spending

Re-spending of wages earned by workers in direct and indirect industries throughout WI.

TOTAL IMPACT

Direct + Indirect + Induced

Output	Jobs	Income
$1.477B	12,525	$507M

The Two-Pillar Economic Model

Visitor tourism and capital equipment sales reinforce one another statewide.

VISITOR TOURISM

$1.125B

10,800 jobs • $390M income

76% of total output

- Lodging, dining & entertainment spending
- Fuel, retail & convenience purchases
- Trail passes, events & gaming activity
- Concentrated in northern tourism hubs

CAPITAL EQUIPMENT

$352M

1,725 jobs • $117M income

24% of total output

- New & used snowmobile sales
- Trailers, tow vehicles & accessories
- Parts, apparel & performance gear
- Dealership & repair facility operations

Visitor Spending Powers Rural Economies

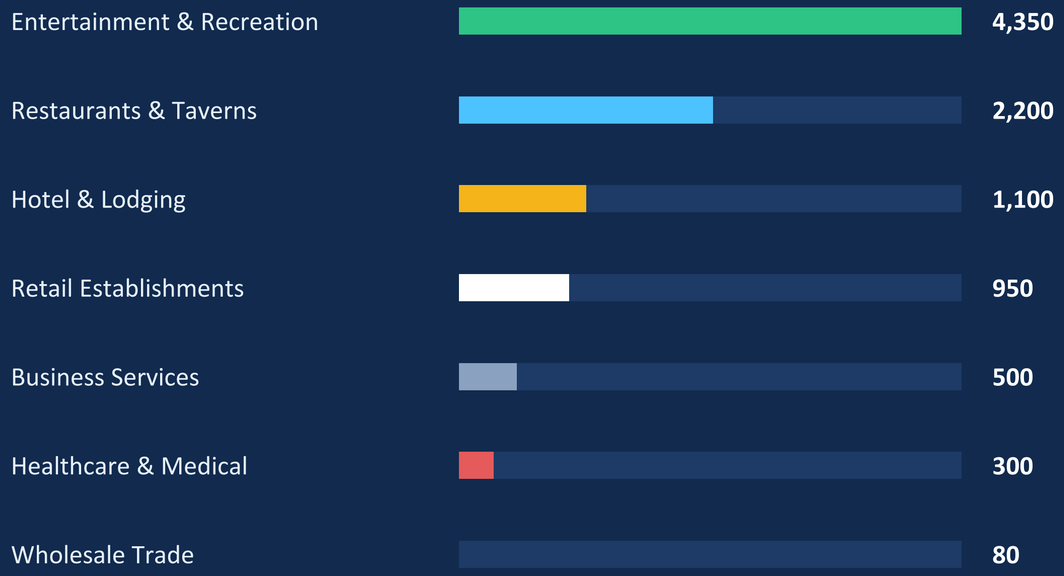
$1.125B in total output supports 10,800 jobs with $390M in labor income.

EFFECT	JOBS	LABOR INCOME	OUTPUT
Direct	8,100	$230M	$600M
Indirect + Induced	2,700	$160M	$525M
TOTAL	**10,800**	**$390M**	**$1.125B**

AVG WAGE • VISITOR SECTOR

$36,111 per job

VISITOR JOBS BY INDUSTRY SECTOR



Powersports & Equipment Sales

$352M in output supports 1,725 high-wage jobs across the state.

EFFECT	JOBS	LABOR INCOME	OUTPUT
Direct	1,075	$75M	$215M
Indirect + Induced	650	$42M	$137M
TOTAL	**1,725**	**$117M**	**$352M**

AVG WAGE • EQUIPMENT SECTOR

$67,826 per job

Retail Dealerships

New & used snowmobile sales, trailers, tow vehicles.

Parts & Apparel

Helmets, riding gear, oil, performance parts.

Business Services

Professional services, logistics, supply chains.

FIRE Sector

Finance, insurance & real estate supporting dealers.

Three Simplifications. One Story.

The next three slides collapse 72 counties into a North/Central/South abstraction — so the flow is visible at a glance.

MAP 01

Day Trips

Where riding happens daily

MAP 02

Overnight Trips

Where riders come from

MAP 03

Total Days

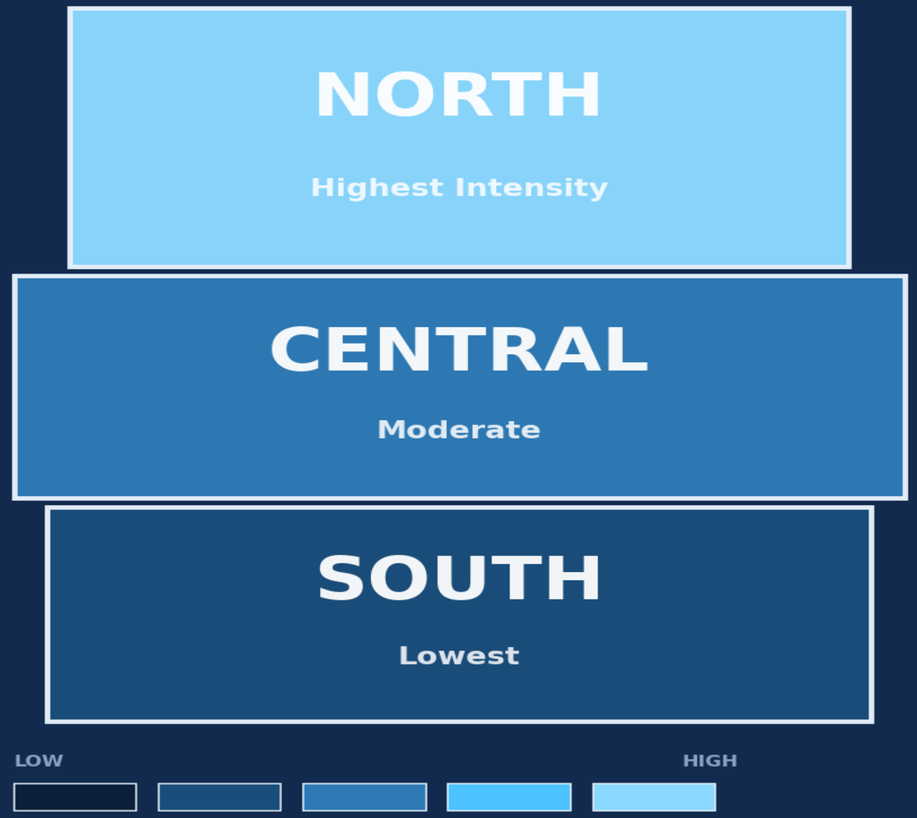
Where activity concentrates

Why Simplify?

- A live audience needs to see the pattern in seconds — not read 72 county labels.
- North/Central/South bands make the north-south economic flow immediately visible.
- The companion PDF contains full county-level choropleths and all raw data.
- This deck tells the story. The PDF proves it.

The North Rides Daily.

Dense trails + reliable snow = everyday local riding in the Northwoods.



THE TAKEAWAY

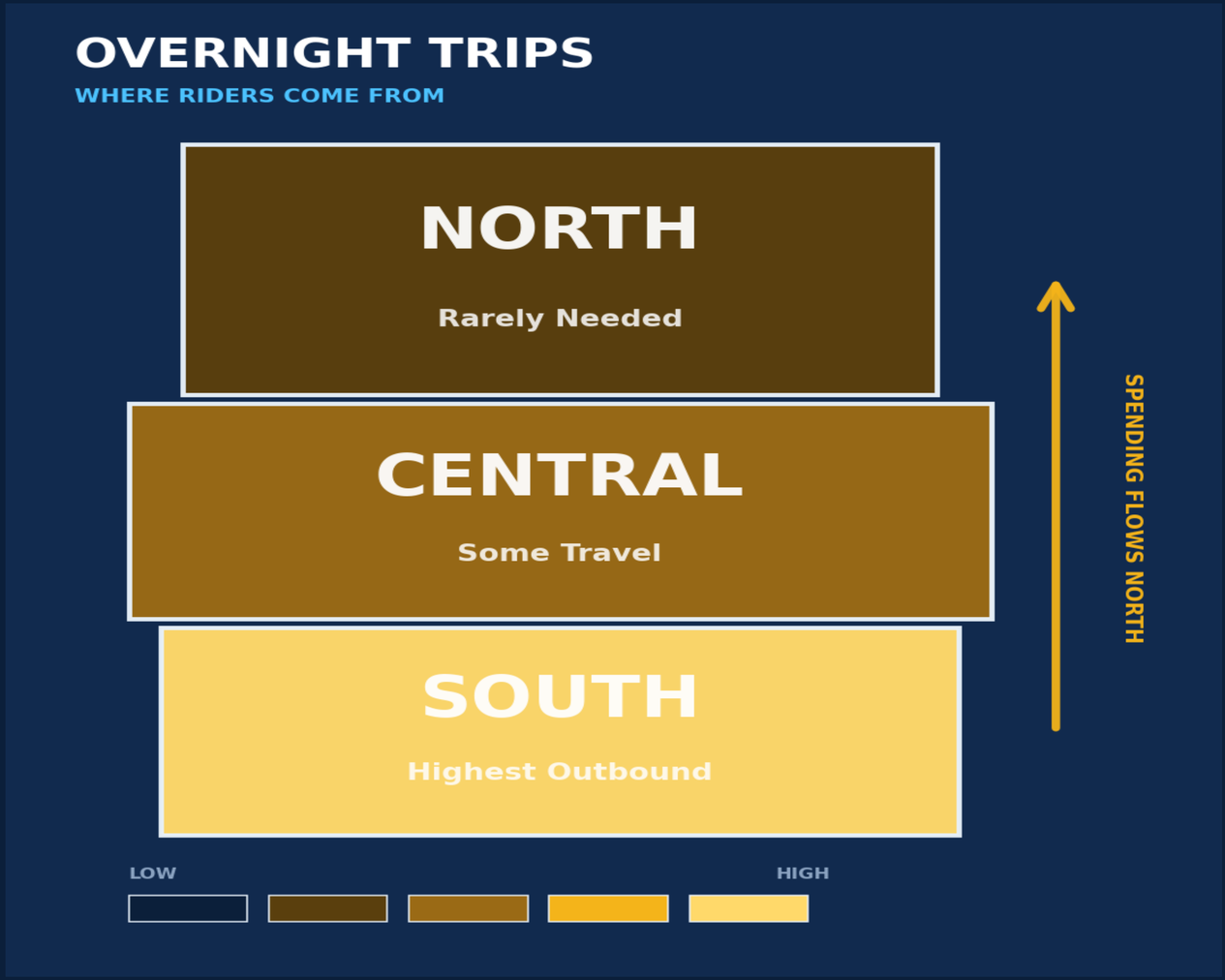
Northern residents ride 9.76–12.00 days per year — without ever needing a hotel.

What This Shows

- Day-trip intensity peaks in northern WI counties.
- Snow reliability + dense trail access = daily use.
- Rider base lives adjacent to the trail system.
- Southern WI participates far less in daily-use form.

The South Travels. The Dollars Follow.

Southern riders are the economic engine behind northern hospitality economies.



THE TAKEAWAY

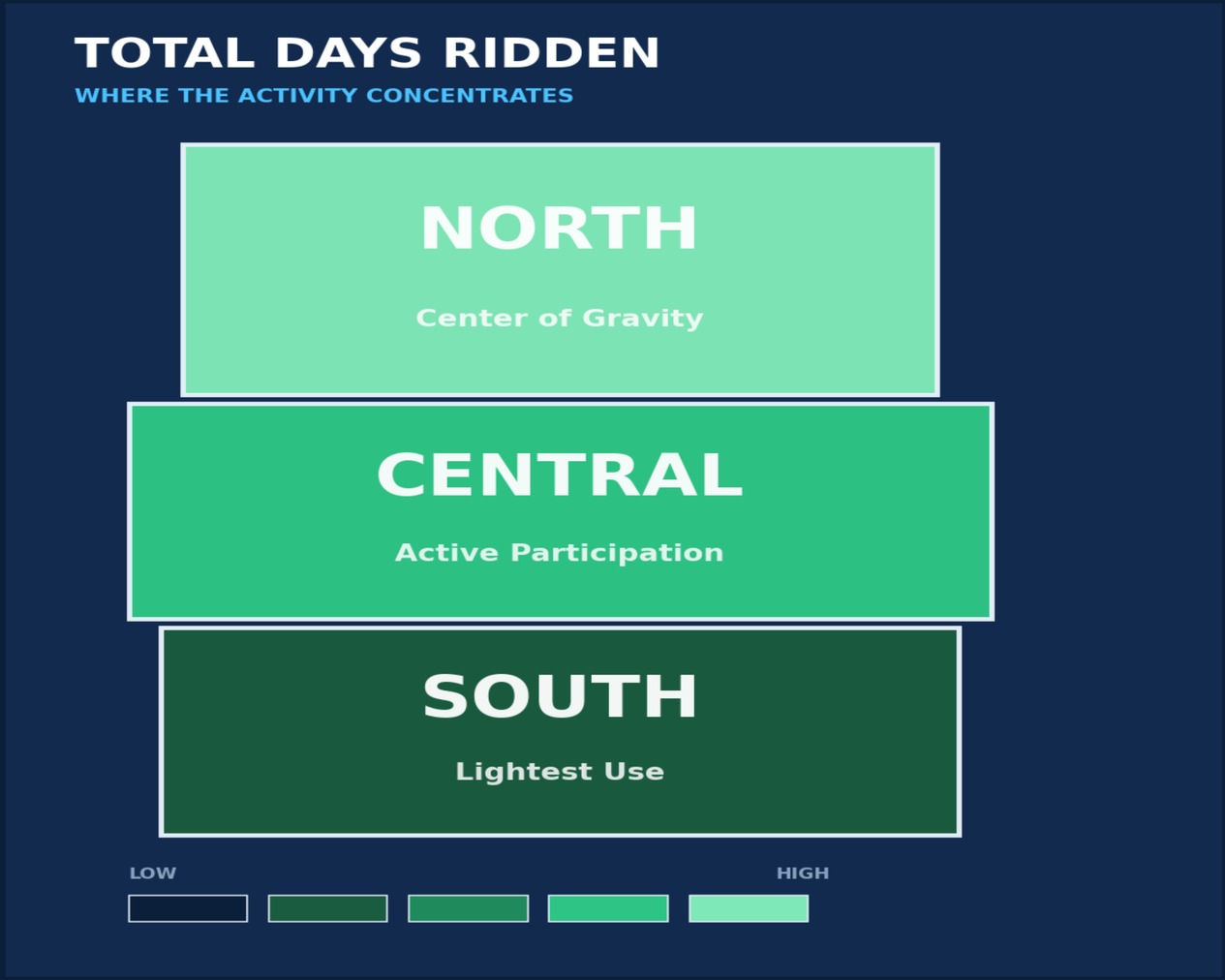
Overnight travel originates in the SOUTH and flows north as spending.

What This Shows

- Overnight trip rates highest in southern WI counties.
- Range: 1.00–1.25 (low) → 3.76–6.00 (high) trips/year.
- Each overnight = lodging + dining + fuel + retail.
- This flow is the economic mechanism of the $1.125B impact.

The Center of Gravity is Northern.

Combining daily use + destination trips — the Northwoods is where the activity lives.



THE TAKEAWAY

The Northwoods is the center of gravity for snowmobile activity.

What This Shows

- Total rider-days peak in northern WI (9.76–10.50/yr).
- Northern proximity outweighs the southern overnight flow.
- Supports the Grow North 30–35% regional economy estimate.
- Policy implication: trail investment protects northern tourism.

Volunteer Clubs & Landowner Partnerships

The AWSC and 580+ local clubs subsidize public recreation at low public cost.

580+

LOCAL SNOWMOBILE CLUBS

Statewide volunteer network maintaining trails.

25,000

MILES OF GROOMED TRAILS

Among the most extensive systems in North America.

200K+

REGISTERED SNOWMOBILES

User-pay registrations fund trail operations.

Role of the AWSC & Volunteer Clubs

- Grooming, signage & safety enforcement on local trail segments.
- Negotiating easements with private landowners (vast majority of trail miles).
- Hosting winter derbies, charity rides & community events.
- Delivering rider safety education & certification programs.

Public Investment Leverage

- Volunteer labor dramatically reduces required public outlay.
- User-pay model: registrations & trail passes fund maintenance.
- Economic Understatement: IMPLAN does NOT capture volunteer labor value.
- Minimal state allocation catalyzes $132M in fiscal returns.

State, County & Local Tax Contributions

$132M total annual tax revenue flows from a two-source fiscal engine.

TOTAL ANNUAL TAX REVENUE

$132 Million

VISITOR TAXES	EQUIPMENT TAXES
$98M	$34M

$98M • Visitor Activity Taxes

- Sales taxes on lodging, meals, fuel & retail purchases.
- County/local option & lodging (room) taxes.
- $10M annually from dedicated user-pay funds (registrations, trail passes, gas tax).
- Event & gaming revenues: derbies, races, charity rides.
- Trail passes & registration transfers to local tourism.

$34M • Equipment & Retail Taxes

- Sales tax on new/used snowmobiles & tow vehicles.
- High-margin taxes on parts, apparel & accessories.
- Business property & income taxes from dealerships.
- Commercial repair & service facility contributions.
- Modest trail fund allocation → high fiscal ROI.

Key Takeaways & Research Team

Policy implications and the UW-Whitewater FERC team behind the study.

01

Essential Winter Economy

$1.477B total impact sustains communities in an otherwise dormant season.

02

Two-Pillar Driver

Tourism ($1.125B) + Equipment ($352M) support 12,525 jobs together.

03

North-South Economic Flow

Southern riders transfer winter spending into northern hospitality economies.

04

High ROI on Trail Funding

User-funded trails yield $132M annual tax revenue & rural stability.

UW-WHITEWATER FERC

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