Mountain states tank, but Pacific states stage a strong come-back, as does Canada. Independent ski areas account for most of the building, while the big conglomerates scale back to, well, almost none.

by David Rowan

Let's face it, there were few who expected this to be a great lift-building year. And it wasn't. In fact, it was the smallest number of new lifts in—well, let's not go there; the number is meaningless.

Nor is there much consolation that we actually added more VTFH than last year. The difference is as small as the consolation. But the big picture needs analyzing: It may be hope that is in the details, not the devil.

One detail of this year's stats was striking: almost all new lifts were accounted for by stand-alone, independent areas, i.e. not one of the multi-area conglomerates. Significance?

Many sense the conglomerates are less interested in building market size today than they are in increasing revenue-per-visit. Understandable, given the huge lift investments they have made over the past few years. So now they are clearly more committed to mining revenues from real estate, lodging and F&B, than they are to increasing lift revenues. Witness the pass wars!

It should also be added that a number of the lift expansions of four and five years ago did not pay off and caused the debt overload that whipsawed the likes of American Skiing Co.

By contrast, the argument goes, there are many areas that are eager to tap unrealized volume with their new lifts. They have room to grow, more so than the majors. And they feel the need to grow. This could be a very healthy trend. And there should be some bells going off when you see Partek enjoying a fine year with its double and triple chairs, going from two lifts last year with a total of 1,608 VTFH, to no less than five this year, with 2,384 in VTFH.

No matter how you view it, however, it is a dramatic contrast between 1997, when 63,531 VTFH installed by the four biggest conglomerates accounted for 43 percent of the total being installed, compared to the 13 percent their three new lifts account for this year.

Of course, within the North American stats there are always winners and losers, and this year they are quite startling. Mountain states, for instance, went from 14 new lifts last year to all of six this year. New VTFH was halved. On the other hand, Pacific areas, which could only point to two new lifts in 2001, managed to triple that to six. The East and Canada, each with 10 new lifts to point

New Lifts by Region

Region	New VTFH	Surface	Chairs	Gondolas/ Trams	Total
East	14,891	-	10	-	10
Midwest	1,744	-	2	-	2
Mountain	12,906	-	5	-	5
Pacific	11,296	-	5	1	6
Canada	26,244	-	10	-	10
Totals	67,081	-	32	1	33

Lift Comparison with Preceding Years

Region	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
East	5	15	13	11	12	10	13	6	12	10
Midwest	3	1	4	1	10	3	4	2	0	2
Mountain	13	13	12	24	24	21	25	11	14	5
Pacific	9	9	5	10	9	17	10	10	2	6
Canada	11	13	7	7	6	13	11	21	9	10
Totals	41	51	41	53	61	64	63	50	37	33

New Lifts by Manufacturer

Manufacturer	Surface	Chair	Gondolas/ Trams	Total lifts	Total VTFH
~~Doppelmayr CTEC~~	-	16	1	17	36,051
~~Leitner-Poma~~	-	10	-	10	28,240
~~Partek~~	-	5	-	5	2,384
Riblet	-	1	-	1	406
Totals	-	32	1	33	67,081

VTFH Comparison with Preceding Years

Region	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
East	10,438	31,603	31,781	15,890	32,123	19,453	33,695	11,358	16,881	14,891
Midwest	1,556	866	1,069	95	5,929	2,185	4,373	1,070	0	1,744
Mountain	33,334	28,807	19,676	59,195	71,199	69,922	52,591	21,999	25,625	12,906
Pacific	18,817	22,645	11,916	28,549	22,088	46,357	17,952	28,521	4,091	11,296
Canada	10,856	24,034	15,430	16,444	15,232	28,265	22,142	32,424	18,042	26,244
Totals	75,001	107,955	79,872	120,173	146,571	166,182	130,753	95,372	64,639	67,081

Location	Type	Manufacturer	Installed HP	Length	Vert.	Cap.	Speed	VTFH (000)
NEW HAMPSHIRE								
Balsams	3C	Partek	30	557	103	1200	300	124
Balsams	3C	Partek	200	3500	980	1200	500	1176
Bretton Woods	4C-Det.	Doppelmayr CTEC	400	3802	826	2400	1100	1982
Bretton Woods	4C	Doppelmayr CTEC	30	828	89	1700	320	151
NEW YORK								
Whiteface	4C-Det.	Doppelmayr CTEC	600	6254	1316	2400	1000	3158
PENNSYLVANIA								
Blue Mtn.	3C	Partek	40	898	120	1200	300	144
Jack Frost	2C	Partek	100	2491	392	1200	450	470
Jack Frost	2C	Partek	100	2491	392	1200	450	470
VERMONT								
Okemo	4C-Det.	Leitner-Poma	600	4381	1261	2640	1100	3329
Sugarbush	4C-Det.	Leitner-Poma	700	6243	1495	2600	1100	3887

Location	Type	Manufacturer	Installed HP	Length	Vert.	Cap.	Speed	VTFH (000)
MINNESOTA								
Buck Hill	3C	Doppelmayr CTEC	40	1020	145	1500	350	218
SOUTH DAKOTA								
Terry Peak	4C-Det.	Doppelmayr CTEC	400	2519	636	2400	1000	1526

Location	Type	Manufacturer	Installed HP	Length	Vert.	Cap.	Speed	VTFH (000)
COLORADO								
Breckenridge	4C-Det.	Leitner-Poma	900	8377	1423	2600	1000	3700
Breckenridge	6C-Det.	Leitner-Poma	754	7149	1320	3000	1100	3960
Glenwood Caverns①	Gondola	Leitner-Poma	400	4432	1351	543	1000	734
UTAH								
Deer Valley	4C-Det.	Doppelmayr CTEC	400	2386	723	2800	1000	2024
Solitude	4C	Doppelmayr CTEC	200	1300	655	1800	450	1179
WYOMING								
Pine Creek	4C	Doppelmayr CTEC	300	4230	1362	1500	475	2043

Location	Type	Manufacturer	Installed HP	Length	Vert.	Cap.	Speed	VTFH (000)
CALIFORNIA								
Mammoth	Gondola	Doppelmayr CTEC	800	5106	282	3600	1200	1015
OREGON								
Cooper Spur	2C	Riblet	60	1279	338	1200	450	406
Hoodoo	4C	Doppelmayr CTEC	300	3635	1029	1800	450	1852
Hoodoo	4C	Doppelmayr CTEC	150	2258	662	1400	450	927
Willamette Pass	6C-Det.	Doppelmayr CTEC	800	4650	1518	3000	1100	4554
WASHINGTON								
Mt. Baker	4C	Doppelmayr CTEC	425	2734	1271	2000	450	2542

Location	Type	Manufacturer	Installed HP	Length	Vert.	Cap.	Speed	VTFH (000)
ALBERTA								
Lake Louise	6C-Det.	Leitner-Poma	600	3876	1383	2500	1000	3458
Sunshine Village	4C	Leitner-Poma	200	2431	599	1950	450	1168
BRITISH COLUMBIA								
Kicking Horse	4C	Leitner-Poma	200	4596	1188	1200	450	1426
Silver Star	4C-Det.	Leitner-Poma	700	6980	1938	1000	2000	1938
Silver Star	6C-Det.	Leitner-Poma	800	5984	1568	3000	1000	4704
Sun Peaks	4C-Det.	Doppelmayr CTEC	600	5713	1292	2800	1000	3618
Mt. Washington	6C-Det.	Doppelmayr CTEC	600	4544	1036	3000	1050	3108
ONTARIO								
Alpine Ski Club	6C-Det.	Doppelmayr CTEC	500	4282	1168	3000	1000	3504
Cedar Highlands	4C	Leitner-Poma	125	974	279	2400	453	670
QUEBEC								
Bromont	4C	Doppelmayr CTEC	400	4100	1164	2277	450	2650

① Not included in lift totals.

A look at what's new: At Solitude, Utah, Doppelmayr CTEC's

to, did well; the Midwest, which had nowhere to go but up after the goose egg of 2001, bounced back with two.

It is well to remember that year-to-year comparisons don't give a balanced picture. The bigger picture is that we have seen a fairly steady decline since the banner year of 1998. In those four short years, new lifts have dropped from 64 to 33, and VTFH from 166,182 to 67,081. (See separate chart.)

(A reminder, VTFH stands for vertical transport feet per hour. A rough measure of both bang and buck, it is simply calculated by multiplying the lift's vertical feet by its capacity in people/hour. *SAM*, where this measure originated, expresses the result in thousands.)

The downward trend cannot be accounted for by such standard scapegoats as a declining stock market, 9/11 and corporate greed. After all, the downward slope started when the economy was innocently ebullient, government surpluses were the fashion and Al Qaeda still unheard of.

The finger, of course, points to the realities of market demand. To date, our efforts to stimulate market growth within whatever market exists have not produced the traction needed to create a need for expansion. Indeed, it can be argued that much lift construction is now in response to real estate needs and cost-effi-

Tows: Rope, Handle, Wire Rope*

Harusch	5	~~Schippers~~	5
Leitner-Poma	1	~~Star Lifts~~**	19
~~Multi Skilift~~	14	**TOTAL**	**44**

**Includes Borer, Brückschlögl and O'Connor.

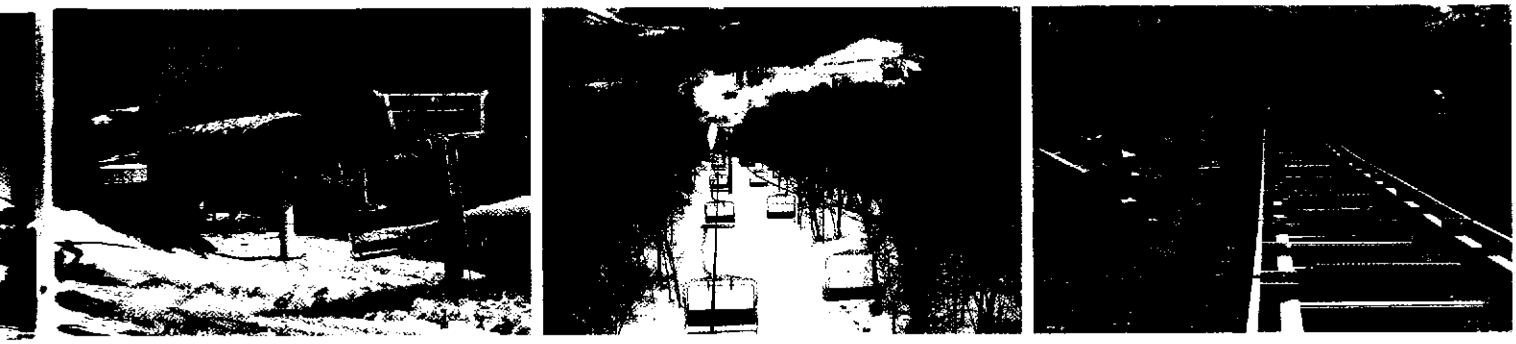
Conveyors*

Kaser Skicarpet NA	14	Star Lifts	16
Magic Carpet	12		
Schippers	4	**TOTAL**	**46**

Ski Carousels*

Star Lifts **4**

***Not included in lift statistics.**



EC's [illegible], the Ruby Express. Next, Leitner-Poma's detachable quad at Breckenridge. Third, Partek's triple at The Balsams, N.H. Right, a Sunkid Wonder Carpet at Mt. Sunapee, N.H.

ciency (consolidation of lift systems that reduce personnel and maintenance costs, often while adding some net capacity.)

This observation comes into focus with the fact that no less than 64 percent of this year's crop of new lifts were replacements of existing lifts. You just don't see that when resorts are expanding terrain to meet consumer demand. But, in turn, the counter movement we referred to above, where the hungry independents see potential, can in time reinvigorate the whole industry.

What about the make-up of this year's new lifts? No big surprises. Of the 33 new lifts, all but one are chairlifts, the lone exception being Mammoth's gondola. (Oh yes, that's right, not a single surface lift. Zip—and that's a first, and a sad one to this writer!)

Of all 32 chairlifts, 15 are detachables. Quads rule, with 19, divided about evenly between detachable and fixed-grip. There are four triples and three doubles. Predictably, the triples and doubles are in the East and Midwest.

For the past few years, as quads and six-packs surged ahead as a percentage of total chairlifts, we have been plotting the changes. This year there is no change from last year, so we have dropped this graphic. Detachables as a percentage of all chairs held steady at 46 percent; quads and six-packs as a percentage of all chairs also remained unchanged at 75 percent. How did the lift manufacturers fare this year—a special year because of the consolidations of Doppelmayr and Garaventa-CTEC and that of Poma and Leitner? Last year, Doppelmayr and Garaventa-CTEC together accounted for 28 of the 37 lifts built, and a 79 percent share of all new VTFH. This year, that number for the merged Doppelmayr CTEC has dropped to 54 percent while accounting for 17 of the 33 new lifts.

Looking at the other merged giant, Leitner-Poma of America (LPA), their 10 new lifts account for 42 percent of the total VTFH—up from 18 percent last year. Is this gain the result of the consolidation? Far be it for us to judge, but I would think not, but rather the typical year-to-year fluctuation between the majors. That, plus a huge year in Canada, where LPA's six new lifts equalled their 2001 total for all of North America.

As for the two remaining independents,. Riblet, with one smallish lift, pretty much repeated, while Partek, as we already noted, showed a big gain with its three triples and two doubles.

Quite apart from the major installations, we can all take heart from the continued exuberant record of uphill devices installed to serve tubing, terrain parks, kiddie instruction hills, tobogganing and all manner of sliding delights. This whole field has added immeasurably to the bottom lines of resorts, to say nothing of adding to the pleasures of visitors to our winter recreation areas.

This year's 44 tows of all designs is just under last year's total of 48. In the carpet/conveyor category, we find 46—up sharply from last year's 37. In its first year in the North American market, the Italian Kaser Skicarpet NA installed 14. Four carousels were also recorded.

As always, our list of new ski lifts does not do justice to all the upgrades, modifications and relocations our industry performs to better serve the public. *SAM's* criteria do not permit us to list these lifts as new, even though the public may seem them as such. For instance, at Maryland's Wisp Ski Area, Doppelmayr CTEC converted their double to a triple; at Vail, Leitner-Poma increased the VTFH of three fixed-grip quads by almost one-third. Nor do we itemize such costly investments as new drive stations and major electrical upgrades.

Finally, although we list non-ski installations by our industry's suppliers—Leitner-Poma's pulsed gondola at Glenwood Caverns, for instance—we do not include their stats in our totals.

So, have we bottomed out of our five-year decline (see chart)? Possibly. And the early season snows in many regions surely augur well.