1999 Lifts: A Modest Downturn

Not a bad year as such, but everything was down a bit compared to last year's sizzler.

Millennial hopes and hypes notwithstanding, 1999 was no record-breaker.

True, the statistic for total new lifts in North America was essentially unchanged from last year (down by just one to 63), but some of the trendlines skidded. The first shocker was that, after countless years of annual increases in the average size (VTFH) of new lifts, we had a 20 percent drop from 2,597 to 2,075. Clearly, last year's crop of huge installations in the Mountain and Pacific states (capped by Squaw Valley's funitel with 7,024) was not to be repeated. Even so, the drop is surprising in the face of some huge lifts, such as the monster detachable quad, complete with bubble, at Whistler/Blackcomb and the existence of another six in the elite 4,000-plus VTFH.

For the record, VTFH is calculated by multiplying the lift's vertical in feet by the capacity in passengers-per-hour. At *SAM*, we divide the result by 1,000, making it a measurement of the number of people a lift can transport 1,000 vertical feet in an hour. This index is a good measure both of the work performed by the lift, as well as a sensitive gauge of investment costs.

The East (+3), Midwest (+1) and the Mountain states (+4) all recorded increases in new lifts, while Canada had a drop of two and the Pacific states a substantial drop of seven. But this hardly gives the complete picture that is contained in the regional breakdown by VTFH. Thus, we see the East surging by 73 percent to 33,695 and the Midwest exactly doubling to 4,373. A surprise. Fueling the East's high numbers were no less than four installations in the 4,000-plus VTFH range. Last year there were none.

At the same time, the Mountain states dropped 25 percent in VTFH, with the Pacific states suffering a 67 percent drop and Canada 23 percent.

Quads and Six-packs

Did quads and six-packs continue their dominance of all chairlifts installed—at 91 percent for the past two years? The

New Lifts by Region

Region	New VTFH	Surface	Chair	Gondolas/ Trams	Total
East	33,695	–	11	2	13
Midwest	4,373	–	4	-	4
Mountain	52,591	–	25	-	25
Pacific	17.952	–	9	1	10
Canada	22,142	–	10	1	11
Totals	130,753	0	59	4	63

Lift Comparison with Preceding Years

Region	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
East	8	10	6	5	15	13	11	12	10	13
Midwest	4	6	3	3	1	4	1	10	3	4
Mountain	16	9	11	13	13	12	24	24	21	25
Pacific	2	5	9	9	9	5	10	9	17	10
Canada	25	18	7	11	13	7	7	6	13	11
Totals	55	48	36	41	51	41	53	61	64	63

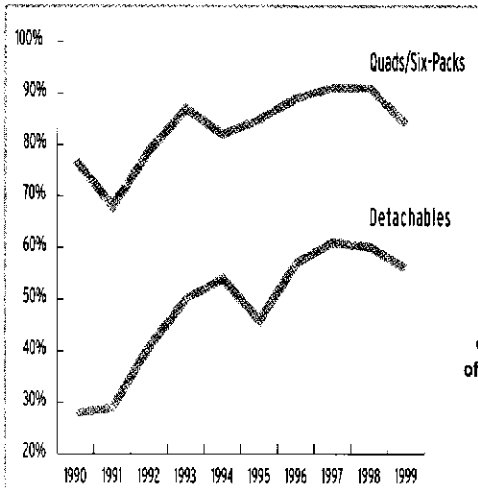
New Lifts by Manufacturer

Manufacturer	Surface	Chair	Gondolas/ Trams	Total lifts	Total VTFH
Doppelmayr	–	12	3	15	39,581
Garaventa CTEC	–	23	-	23	41,600
Leitner	–	4	-	4	11,232
Partek	–	2	–	2	1,691
Poma	–	13	1	14	31,245
Riblet	-	5	-	5	5,404
Totals	0	59	4	63	130,753

VTFH Comparison with Preceding Years

Region	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
East	14,823	19,775	9,129	10,438	31,603	31,781	15,890	32,123	19,453	33,695
Midwest	2,779	3,624	3,083	1,556	866	1,069	95	5,929	2,185	4,373
Mountain	40,480	27,593	26,281	33,334	28,807	19,676	59,195	71,199	69,922	52,591
Pacific	4,972	3,831	21,675	18,817	22,645	11,916	28,549	22,088	46,357	17,952
Canada	30,762	33,821	16,420	10,856	24,034	15,430	16,444	15,232	28,265	22,142
Totals	93,816	88,644	76,588	75,001	107,955	79,872	120,173	146,571	166,182	130,753

Location	Type	Manufacturer	Installed HP	Length	Vert.	Cap.	Speed	VTFH (000)
East								
MASSACHUSETTS								
Wachusett Mtn.	4C-Det.	Doppelmayr	400	3516	600	2600	1000	1560
NEW HAMPSHIRE								
Bretton Woods	4C	Garaventa CTEC	250	3752	830	1800	450	1494
Cannon Mtn.	4C-Det.	Garaventa CTEC	600	5251	1318	2400	1000	3163
Cannon Mtn.	3C	Garaventa CTEC	30	790	105	1400	350	147
NEW YORK								
Belleayre Mtn.	4C	Garaventa CTEC	400	5030	1138	2400	450	2731
Belleayre Mtn.	4C	Garaventa CTEC	400	3635	945	2400	450	2268
Bristol Mtn.	4C-Det.	Garaventa CTEC	500	4103	1106	2400	1000	2654
Gore Mtn.	Gondola (8)	Poma	900	7208	1703	2400	1100	4087
Whiteface Mtn.	Gondola (8)	Doppelmayr	1200	8487	2432	2000	1212	4864
PENNSYLVANIA								
Jack Frost	2C*	Partek	100	2702	526	1200	450	631
VERMONT								
Jay Peak	4C-Det.	Leitner	1000	7350	1620	2600	1100	4212
Stratton Mtn.	6C-Det.	Garaventa CTEC	900	4620	1340	3600	1100	4824
VIRGINIA								
Wintergreen	4C	Partek	150	1672	530	2000	400	1060
Midwest								
MINNESOTA								
Welch Village	4C	Riblet	100	1623	291	2000	425	582
OHIO								
Mad River Mtn.	4C	Riblet	100	1477	291	2000	380	582
SOUTH DAKOTA								
Terry Peak	4C-Det.	Doppelmayr	500	4063	1040	2500	1000	2600
WISCONSIN								
Alpine Valley	4C-Det.	Poma	200	1426	290	2100	900	609
Mountain								
COLORADO								
Aspen Highlands	4C-Det.	Poma	400	4743	1116	1200	1100	1339
Breckenridge	6C-Det.	Poma	700	5577	632	3600	1100	2275
Monarch	4C	Garaventa CTEC	300	3630	805	2400	450	1932
Silver Creek	4C-Det.	Leitner	500	4360	840	2400	1100	2016
Telluride	4C-Det.	Doppelmayr	700	6254	1244	2800	1000	3483
Telluride	4C-Det.	Doppelmayr	500	4912	936	2400	1000	2246
Vail	4C-Det.	Poma	900	6704	1665	2000	1100	3330
Vail	4C-Det.	Poma	900	8391	1924	1800	1100	3463
Vail	4C-Det.	Poma	500	4834	1357	1200	1100	1628
Winter Park	4C-Det.	Poma	600	4637	1243	2400	1100	2983
Wolf Creek	4C	Garaventa CTEC	400	5215	1101	1800	475	1982
IDAHO								
Bogus Basin	4C-Det.	Doppelmayr	700	5302	1792	2400	1000	4301
MONTANA								
Bridger Bowl	3C	Garaventa CTEC	30	401	40	1000	300	40
Yellowstone Mtn. Club	4C-Det.	Doppelmayr	600	6016	1330	2000	1000	2660



Quads/Six-Packs & Detachables as a Percentage of Total Chairlifts

The rise in the dominance of detachables and also of quads and six-packs as the workhorses of the industry seems definitely to have leveled off, as the ratio of these configurations to all chairlifts slid this year. The breakdown changed a little this year with six-pack installations doubling from three to six.

answer is No. The percentage dropped to 83 percent. Detachables as a percentage of total chairs also dropped a tad— from 59 to 56 percent.

Does any of this presage a trend or is it an anomaly? Probably neither. Rather, 1998 was probably the anomaly and 1999 more in the mainstream of what happened in the previous three years. For instance, last year there were no less than eight new gondolas or trams, but this year's total of four is more in keeping with 1997 (3), 1996 (4) and 1995 (1). All this year's gondolas are 8-passenger. Two of them feature CWA cabins and the other two Gangloff.

A subset of these figures is that six-packs doubled from three to six. One of the five that Poma installed marks a passing: it replaces the 1981 Quicksilver quad at Breckenridge—the dawn of the detachable chair movement that the public embraced so enthusiastically. That historic Doppelmayr, featured on a *SAM* cover in 1982, lives on in its new home at Owl's Head in Quebec. The new Quicksilver is also an innovator: it is the first North American installation to use the new Double Loading System (DLS). There are four European lifts with this breakthrough technology.

The "Big Four"

We have been keeping track of the impact of the "big four" (American Skiing Co., Booth Creek Holdings, Intrawest and Vail Resorts). Interesting. Two years ago, their combined lift purchases accounted for 43.3 percent of total new VTFH; last year that had dipped to 37.8 percent and this year the slide continues to 21.6 percent.

The numbers in any one year for any of these companies are not significant, but one can make the unsurprising case for a correlation between the annual reports of the three publicly traded companies and their lift purchases.

Intrawest repeated as the biggest lift purchaser, accounting for 12 percent of the total new VTFH. That's down from 17 percent last year. Vail Resorts went from one to four new lifts and eight percent of the total, while ASC dropped from six to one and just 1.3 percent of the total. Booth Creek went from three lifts in 1998 to none this year.

Sharing the Business

How did the lift suppliers do? Of the

international big four (Doppelmayr, Garaventa/CTEC, Leitner and Poma), only Poma saw a modest gain. On the positive side, it was interesting to see the venerable Riblet rebounding from last year's zero to five new lifts this year. We also note the detachable quad at Jay Peak, Vt., is the first in the East for Leitner.

What else to note? Last year, the Midwest got its first detachable; this year it added two more. Impressive.

As always, there are some interesting installations, starting with Doppelmayr's pulse gondola at Panorama, B.C. This configuration is not uncommon in Europe, but this side of the Atlantic it is something of a rarity.

Other Lifts

Conveyor lifts continue strong, but at 24 new installations, down from last year's 39. It is hard to get complete numbers on handle tows and tubing tows, but they seem to be down by more than 40 percent. Special significance? Probably not, but rather a case of the same set of economics and snow-year realities that determine gondola and detachable sales.

Incidentally, this is the second year in a row—and historically, the *only* two years—that no new surface lifts have been recorded.

Finally, we note that *SAM's* 38 years of reporting on lift construction continues to adhere to a rather strict definition of what "new" means. As such, the total investment in uphill transportation in any year includes a lot of lift relocations, reengineerings and other upgrading that we do not include in our totals. To the skiers and boarders we all work for, these are often "new" lifts.

And that's great!

Mountain continued

Location	Type	Manufacturer	Installed HP	Length	Vert.	Cap.	Speed	VTFH (000)
Alta	3C-Det.	Garaventa CTEC	400	4730	810	1800	800	1458
UTAH								
Deer Valley	4C-Det.	Garaventa CTEC	800	6610	1398	2800	1000	3914
Deer Valley	4C	Garaventa CTEC	150	1720	279	2800	375	781
Portal Vistas**	4C	Garaventa CTEC	75	2096	813	500	250	
Powder Mtn.	4C	Garaventa CTEC	400	5770	1615	1550	475	2503
Rustler Lodge	3C	Garaventa CTEC	25	434	85	600	300	51
Snowbird	4C-Det.	Garaventa CTEC	500	3515	1435	2200	1000	3157
The Canyons	4C	Garaventa CTEC	250	2815	1028	1700	465	1748
Utah Winter Sports Park	2C	Garaventa CTEC	40	1210	461	550	450	254
WYOMING								
Jackson Hole	4C-Det.	Poma	800	5097	1748	2000	1000	3496
White Pine	3C	Garaventa CTEC	250	4403	913	1500	450	1370
White Pine	3C	Garaventa CTEC	50	1215	181	1000	400	181

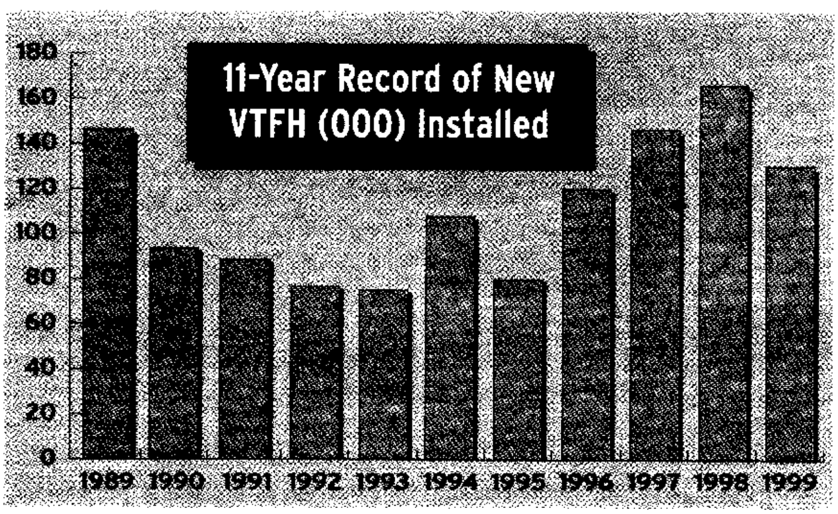
Pacific

Location	Type	Manufacturer	Installed HP	Length	Vert.	Cap.	Speed	VTFH (000)
CALIFORNIA								
Mammoth Mountain	4C-Det.	Doppelmayr	200	1875	556	2400	1000	1334
Mammoth Mountain	Gondola (8)	Doppelmayr	500	3875	717	2400	1200	1721
Mountain High	4C-Det.	Doppelmayr	500	3500	994	2800	1000	2783
Squaw Valley	6C-Det.	Poma	500	3068	564	2400	1000	1354
Squaw Valley	6C-Det.	Poma	800	5441	1756	2000	1100	3512
Sugar Bowl	4C-Det.	Garaventa CTEC	500	3505	1015	2800	1000	2842
Sugar Bowl	4C	Garaventa CTEC	40	673	83	2000	400	166
OREGON								
Anthony Lakes	3C	Riblet	200	3201	800	1800	450	1440
Hoodoo	4C	Riblet	200	2127	695	2200	450	1529
WASHINGTON								
Stevens Pass	3C	Riblet	150	1513	706	1800	425	1271

Canada

Location	Type	Manufacturer	Installed HP	Length	Vert.	Cap.	Speed	VTFH (000)
ALBERTA								
Banff-Norquay	4C	Leitner	150	1610	360	1700	450	612
BRITISH COLUMBIA								
Kimberley	4C-Det.	Leitner	1000	7800	1830	2400	1100	4392
Panorama	Gondola (8) Pulse	Doppelmayr	161	710	130	870	590	113
Whistler/Blackcomb	4C-Det.***	Doppelmayr	800	5814	1129	2650	1000	2992
Whistler/Blackcomb	4C-Det.	Doppelmayr	1080	7113	2175	2800	1000	6090
ONTARIO								
Alpine Ski Club	4C	Doppelmayr	200	2162	535	2400	450	1284
Blue Mountain	6C-Det.	Poma	400	2543	604	2800	984	1691
Blue Mountain	3C	Poma	75	853	164	1620	394	266
Craigleith Ski Club	4C-Det.	Garaventa CTEC	400	3352	693	2800	1070	1940
Mount St. Louis	6C-Det.	Poma	300	2343	404	3000	984	1212
QUEBEC								
Mont Blanc	4C	Doppelmayr	300	2723	646	2400	450	1550

* Dual Double
** Not included in lift totals.
*** Bubble



Handle Tows/Wire Rope Tows*

Borer	5	Liftram	1
Brückschlögl	4	Multi Skilift	14
Harusch	10	Schippers	6
Leitner	4	**TOTAL**	**44**

Conveyors*

Barrie Welding	1	Magic Carpet	9
Brückschlögl/Sunkid	14	**TOTAL**	**24**

*Not included in lift statistics.