

# North Carolina Ski Areas Association Economic Value Analysis

**2014-15  
Season**



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# North Carolina Ski Areas Association Economic Value Analysis, 2014/15 Season



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*Final Report*

*August 2015*

## Introduction

This report summarizes the preliminary findings of an Economic Value Analysis Study of the sport of alpine skiing and snowboarding in North Carolina.

The North Carolina Ski Areas Association (NCSAA), the trade group for alpine ski areas in the state, commissioned the study, which was conducted by RRC Associates (RRC) of Boulder, Colorado. RRC is the leading consulting and market research firm in the alpine snowsports industry and tracks many statistics and figures for the industry throughout North America. RRC publishes annually on behalf of the National Ski Areas Association (NSAA) the Kottke End of Season Report, the National Demographic Study, and the Economic Analysis of US Ski Areas, three industry reports that track patterns of significance related to operational, demographic, and financial information, respectively.

North Carolina has six operating ski areas within the state's borders, drawing visitors from all across the Southeast. The ski resort industry is very important to the state, particularly during the time of year when such businesses operate (November through March), and quantifying the economic value of the industry is necessary to understanding its significance.

## Executive Summary

The Economic Value is defined as the total value to the economy due to the existence of ski areas. The total value is the amount that such ski areas contribute to the North Carolina economy, and the amount by which the economy would suffer without those ski area facilities.

The total economic value documented in this report is the sum of winter value, employment value, and capital improvements, along with economic multipliers that take into account the ripple effects (indirect and induced effects) of the industry's impact. The focus of this analysis is the winter season during which the ski areas operate, generally November to March.

Primary sources of information for this analysis included surveys of skiers and snowboarders at North Carolina ski areas and a survey of the ski area operator. The guest surveys profiled visitors in terms of demographics, geographic origin, satisfaction, and expenditure patterns, among others. The survey of ski area operators documented total volume of business (skier visits), revenue, expenses, employment, days of operation, and capital expenditures.

Using these data sources, a model was created to estimate the total economic value of the ski resort industry to North Carolina.

- Direct Value for the 2014/15 winter season was **\$119.5 million**
- Indirect and Induced Value for the 2014/15 winter season was **\$77.7 million**.
- Total Economic Value, the sum of direct and indirect/induced value, is **\$197.2 million**.

The ***overall economic value of the ski resort industry to the State of North Carolina was \$197.2 million*** for the period covering the 2014/15 season.

This economic value figure quantifies only the most direct impacts, and does not include summer value, social, environmental, or cultural impacts, which can be significant but are more difficult to quantify and have thus been excluded from this analysis. See the section titled "Other Benefits" for a discussion of some of these qualitative effects.

## Methodology

Several sources of information were utilized to construct this Economic Value Study. Ski areas in the state submitted questionnaires to RRC Associates about operations, including total volume of business (skier visits, tubing visits, and ice skating visits), revenues, expenses, number of employees, days of operation, capital expenditures, and other information.

A second survey was administered during the 2014/15 winter season to visitors to North Carolina ski areas. The guest surveys profiled visitors in terms of demographics, geographic origin, satisfaction, and expenditure patterns, among others. Surveys were conducted at five different ski areas in North Carolina (Appalachian Ski Mtn., Beech Mountain Resort, Cataloochee Ski Area, Sugar Mountain Resort, and Wolf Ridge Ski Resort). The surveys returned were statistically weighted to be proportionate to the skier visits at the respective ski areas, making the overall results more representative. **A total of 1,967 surveys were collected during the season**, which represents a very good quantity of surveys for this study.<sup>1</sup>

As opposed to other types of visitor or tourism impact studies, this report focuses on the **economic value** of the alpine ski resort industry to North Carolina. While many economic impact studies focus on new or incremental spending from out-of-region visitors, this analysis instead highlights the value that the industry produces given its current configuration, inclusive of residents and visitors alike. Importantly, skiing and snowboarding are activities that participants would likely do elsewhere if no facilities existed in North Carolina. In other words, resident skiers and snowboarders most likely would not give up their sport, but would instead travel elsewhere to participate. As such, this study is not limited to visitors to North Carolina, but is inclusive of all skiers and snowboarders who participate at facilities within the state's boundaries.

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<sup>1</sup> For the total sample size of 1,967 interviews conducted, the margin of error is +/- 2.21 percent (for the 95 percent confidence interval). Note that the margin of error is different for each question response on the survey depending on the resultant sample sizes, proportion of responses, and number of answer categories for each question. Comparison of differences in the data between various market segments and from year to year, therefore, should take into consideration these factors. As a general comment, it is sometimes more appropriate to focus attention on the general trends and patterns in the data rather than on the individual percentages.

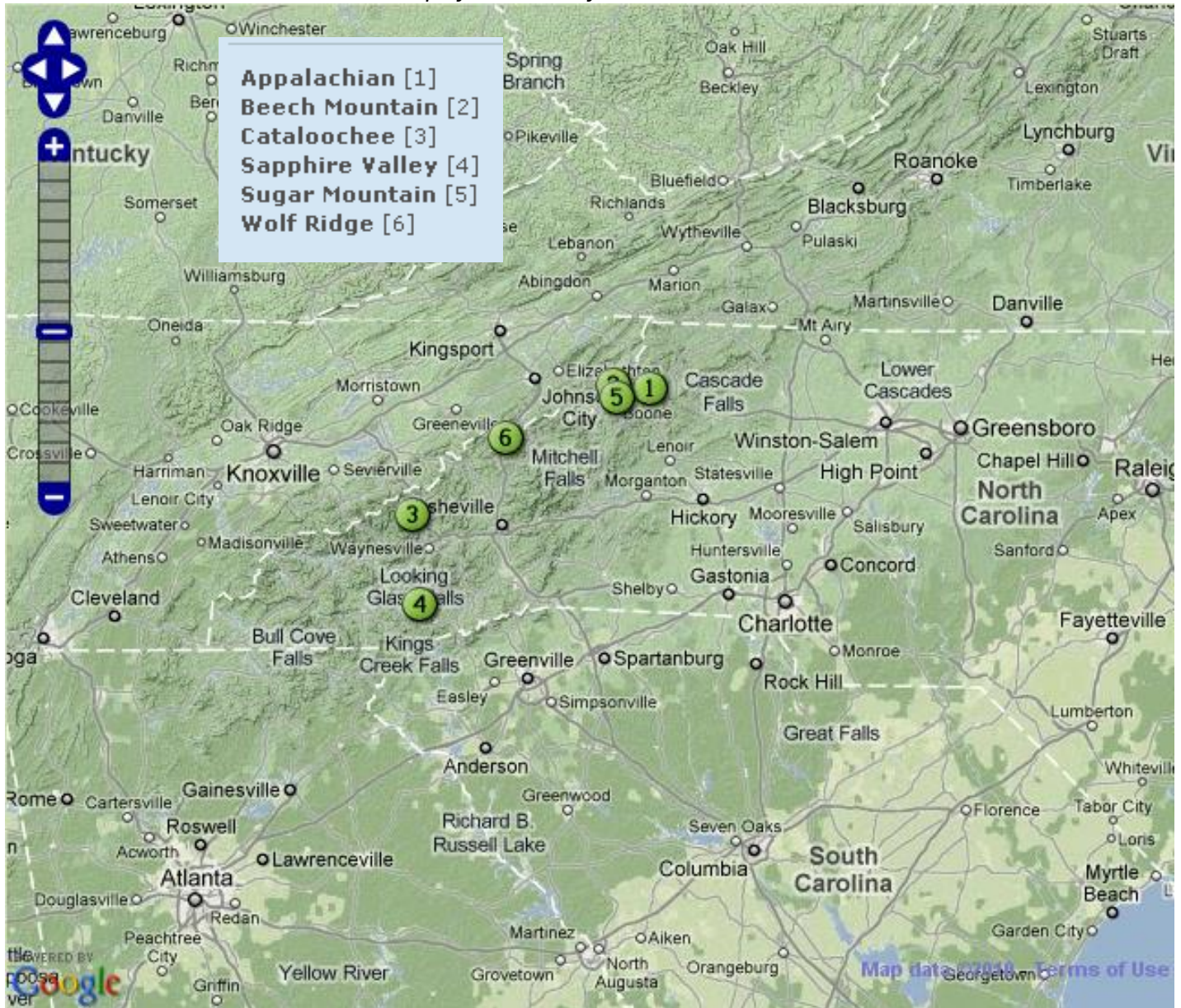


## Final Report Findings

### North Carolina Ski Resort Industry

The state has a small number of operating ski areas (6), but provides a wide variety of opportunities for snowsports enthusiasts. The ski areas are in the western part of the state, as illustrated in the map below.

Figure 1  
Map of Ski Areas of North Carolina



Of the six ski areas in the North Carolina ski resort industry, five returned surveys about their operations. Assumptions were made to project the results from the other ski area, allowing for total state figures to be estimated.

The table below outlines some of the key operational and financial statistics regarding the North Carolina ski resort industry.

*Table 1  
Key Statistics for North Carolina ski areas, 2014/15 Season*

<b>2014/15 Season Statistics</b>	
<b>Total Visits</b>	653,654
<b>Total Revenue</b>	\$39,931,951
<b>Year-Round Employees</b>	87
<b>Seasonal Employees</b>	1,787
<b>Capital Expenditures</b>	\$8,493,000

As seen in the table above, the ski area industry in North Carolina provides 87 year-round jobs and 1,787 seasonal jobs. The industry generated nearly \$40 million in gross revenue from ski area operations, including lift tickets, lessons, equipment rental, retail stores, food & beverage (which is a concession at some North Carolina ski resorts), and other operating departments.

While most North Carolina ski areas do not own or operate lodging accommodations, the industry is responsible for many overnight stays in local commercial lodging and private accommodations managed by property management firms. The benefit to the local economy is apparent from the gross lodging revenues generated in local municipalities like Boone, Blowing Rock, Maggie Valley, Beech Mountain, Banner Elk, and Sugar Mountain, as well as counties such as Madison County (Wolf Ridge Ski Resort), Haywood County (Cataloochee Ski Area), Avery County (Sugar Mountain Resort) and Watauga County (Beech Mountain Resort and Appalachian Ski Mtn.). These revenue figures are calculated from Tourism Development Authority occupancy tax collections, and they corroborate the lodging expenditures from visitor spending (detailed in the Visitor expenditures section below).

Some selected gross revenue figures for the November to March period, derived from Tourism Development Authority occupancy tax collections, are presented in the table to follow. While some hotel visitors during that time might be visiting for some other reason, most hotel stays during the winter are related to skiing and snowboarding in the geographic areas represented by these TDAs. These gross occupancy revenues demonstrate the extent to which the ski resort industry has a real impact on the local economy beyond the ski area's direct revenue.



*Table 2A*  
*Gross Revenue from Lodging Operations, November to March*  
*(Calculated from Occupancy Tax Collections)*

	<u>2010/11</u>	<u>2011/12</u>	<u>2012/13</u>	<u>2013/14</u>	<u>2014/15</u>
<b>Village of Sugar Mountain</b>	\$2,708,679	\$2,334,119	\$2,544,722	\$3,005,047	\$3,192,147
<b>Haywood County</b>	\$4,877,950	\$4,979,150	\$5,406,300	\$5,767,425	\$6,469,925
<b>Town of Banner Elk</b>	\$1,096,917	\$847,480	\$988,163	\$1,138,947	\$1,212,889
<b>Town of Beech Mountain</b>	\$2,647,133	\$2,026,717	\$2,147,117	\$2,559,550	\$3,024,333
<b>Madison County</b>	\$1,247,466	\$1,296,636	\$1,489,204	\$1,461,931	\$1,781,342
<b>Blowing Rock</b>	\$2,942,845	\$2,855,940	\$3,241,409	\$3,571,993	\$4,018,891
<b>Boone</b>	\$5,422,679	\$5,108,433	\$5,539,086	\$6,132,015	\$5,980,113
<b>Watauga County</b>	\$4,708,778	\$5,176,726	\$5,946,488	\$6,345,242	\$7,367,667

Of note, the share of the annual gross occupancy revenue that the five-month winter period (November to March) represents for the Village of Sugar Mountain is approximately 78 percent, while at the Town of Beech Mountain, winter represents about 64 to 71 percent of the annual gross lodging revenue. These figures clearly show the importance of the winter season to the overall tourism impact. Even in communities where summer tourism dominates, like Blowing Rock and Boone, winter lodging revenues are vital to maintaining a year-round tourism economy and economic stability.

*Table 2B*  
*November to March Gross Lodging Revenues (calculated from Occupancy Tax Collections) as*  
*Percent of Annual Total*

	<u>2010/11</u>	<u>2011/12</u>	<u>2012/13</u>	<u>2013/14</u>	<u>2014/15</u>
<b>Village of Sugar Mountain</b>	80.2%	77.1%	77.8%	78.2%	77.8%
<b>Haywood County</b>	21.8%	22.4%	22.6%	23.2%	24.3%
<b>Town of Banner Elk</b>	51.0%	44.0%	46.3%	48.4%	51.3%
<b>Town of Beech Mountain</b>	71.8%	65.7%	63.7%	71.2%	71.4%
<b>Madison County</b>	41.8%	42.0%	44.8%	39.4%	41.4%
<b>Blowing Rock</b>	25.2%	23.8%	25.8%	27.0%	28.7%
<b>Boone</b>	32.6%	30.2%	31.3%	32.2%	32.8%
<b>Watauga County</b>	34.4%	35.0%	36.4%	37.6%	40.3%

## Visitor Expenditures

One of the primary functions of the survey research was to document spending patterns among skiers and snowboarders in North Carolina. Survey respondents were asked to detail the dollar amounts their group spent on the trip for a variety of categories, including lift tickets/tubing/ice skating (27.4 percent of the total), ski/snowboard lessons, ski/snowboard equipment rental, lodging, food & beverage (both at the ski area and at off-mountain locations), shopping/gifts/souvenirs, entertainment/activities, local transportation/rental car, and other spending. This section of the report details these results.

Results for group expenditures were divided by the number of people in the group to arrive at a per person spending figure for each of the categories, as presented in the table below. The sum of all the categories results in a total per person expenditure figure for the visit. The **average expenditure per person for the ski trip within the state of North Carolina is \$182.84.**

*Table 3*  
*Average Spending per Person*  
*2014/15 Ski Season*

Type of Expenditure	Per Person Spending	Percent of Total
Lift tickets/tubing/ice skating	\$50.14	27.4%
Lodging accommodations (nightly rate)	\$29.53	16.2%
Food/beverage/restaurants on-mountain/base area	\$25.45	13.9%
Food/beverage/restaurants in other North Carolina cities	\$20.74	11.3%
Equipment rental/demo at ski area	\$17.41	9.5%
Shopping/gifts/souvenirs/retail stores	\$13.00	7.1%
Ski/snowboard lessons	\$7.85	4.3%
Entertainment/activities	\$6.08	3.3%
Local transportation/rental car	\$6.05	3.3%
Equipment rental/demo at other North Carolina locations	\$4.32	2.4%
Other spending	\$2.27	1.2%
<b>TOTAL PER PERSON SPENDING</b>	<b>\$182.84</b>	<b>100%</b>

It is particularly important to note the importance and economic value of the ski resort industry during the four-month winter season in which these businesses primarily operate. Tourism is an important industry in North Carolina throughout the year, but the summer months tend to dominate this industry. The winter months represent the low season in most tourism areas in the state, with the exception of those regions where skiing and snowboarding is offered. In other words, the **ski resort industry provides economic value at a particularly important time**

*of the year.* As well, its presence allows for year-round employment opportunities for residents of these areas of the state and provides for a diversified and year-round economy.

The per person expenditures were then multiplied by the total skier visit figure for the state in 2014/15 (653,654 final statewide total) to derive a total direct expenditure figure. As presented in the table below, skiers and snowboarders visiting **North Carolina ski areas were directly responsible for \$119.5 million in direct expenditures during the 2014/15 winter season.**

*Table 4*  
*Total Direct Expenditures*  
*2014/15 Ski Season*

Type of Expenditure	Total Direct Expenditures
Lift tickets/tubing/ice skating	\$32,775,785
Lodging accommodations (nightly rate)	\$19,305,151
Food/beverage/restaurants on-mountain/base area	\$16,636,869
Food/beverage/restaurants in other North Carolina cities	\$13,556,459
Equipment rental/demo at ski area	\$11,380,967
Shopping/gifts/souvenirs/retail stores	\$8,496,457
Ski/snowboard lessons	\$5,129,028
Entertainment/activities	\$3,971,733
Local transportation/rental car	\$3,957,222
Equipment rental/demo at other North Carolina locations	\$2,824,309
Other spending	\$1,481,899
<b>TOTAL SPENDING</b>	<b>\$119,515,879</b>

## Multiplier

Economic value has several effects, including direct and secondary (indirect and induced effects). Thus far, this report has focused on the direct value that ski areas generate. To estimate the indirect and induced effects, a multiplier is generally utilized. A multiplier is a figure used to estimate the secondary effects on the statewide economy of a particular industry.

Several factors impact the size of a multiplier. Industries in large urban areas generally have higher multipliers because more of the spending by the industry stays within the local area. Smaller industries in more rural areas would generally have smaller multipliers because more of their spending leaks out to other regions where the goods are produced. For tourism and other service industries, multipliers might be somewhat higher because the spending is actually for a service, not a product, and thus more value is retained. A multiplier for a state-level analysis would tend to be higher than one for a regional or local analysis. All these factors must be taken into consideration when estimating the multiplier. The reliability of the level of tourism activity (in this case, skier visits) and spending should also be taken into account.

Given some of the above factors and the conservative nature of this analysis, a relatively low multiplier has been utilized for this report. While the confidence in the direct spending is high (very reliable skier visit, tubing visit, day/overnight visitor percentages, and visitor expenditure numbers), the calculation of a multiplier through an Input-Output model or other academic modeling is beyond the scope of this analysis. Rather, comparisons to similar industries and expert judgment were used to derive the multiplier figure. For this analysis, ***a multiplier of 1.65 has been utilized.***

Direct spending was estimated to be \$119.5 million. Taking the multiplier (1.65) into account, ***the total economic value of the ski area industry to North Carolina is \$197.2 million.***

The study done in 2009/10 estimated a total value of \$145.9 million, with the same multiplier used. The 2014/15 figure is 35.1 percent higher than the 2009/10 number, an average increase of 5.0 percent per year in economic value. This level of growth is impressive and shows the continued importance of the ski area industry to the state economy.

The table below presents some of the salient information from this report in comparison to prior reports, with the caveat that different methodologies were used to collect the information in prior seasons. The 2014/15 season was a very strong season for North Carolina ski areas, with 653,654 skier visits; total payroll was \$8.6 million for 1,875 full time and part time employees.

*Table 5  
Summary Statistics, North Carolina Ski Resorts*

Season	Total Skier/ Snowboarder Visits	Total Resort Revenues (\$Millions)	Total Resort Payroll (\$Millions)	Total Resort Employment
1976/77	338,000	\$5.7	\$1.4	760
1985/86	580,000	n/a	\$3.0	1,100
1995/96	641,000	\$22.0	n/a	1,404
2000/01	544,000	\$21.5	\$6.6	1,788
2001/02	476,000	\$18.9	\$6.5	1,644
2002/03	544,000	\$23.1	\$6.9	1,759
2008/09	614,675	\$28.7	\$8.5	1,665
2009/10	671,554	\$32.5	\$8.7	1,653
2012/13	576,097	\$30.7	\$7.6	1,685
2013/14	607,969	\$35.0	\$8.4	1,891
2014/15	653,654	\$39.9	\$8.6	1,875

Source: Surveys of Ski Area Owners/General Managers

## Other Benefits

The presence of the ski resort industry in North Carolina has many other benefits not included in the direct economic value analysis presented above. This section describes some of these non-monetary benefits, which exist but are difficult to accurately quantify.

### Quality of Life Impacts

Overall, alpine ski resorts have a positive impact on the quality of life in the parts of the state in which they operate. They provide a sense of community, civic pride, something that local residents identify with and are a part of, and other intangible benefits. Ski areas also encourage quality family experiences; create opportunities for competitive & non-competitive clubs; provide social benefits through social clubs; and allow for winter season healthy, athletic after-school programs. An appreciation for natural beauty and learning about habitat is also enhanced through the essential outdoor component of the skiing experience.

### **Events and Exposure**

Media coverage of events at ski areas provides terrific promotional and branding exposure that is worth much more than the events themselves cost. Some of the larger events which garner significant regional and national media coverage include ski races, snowboarding freestyle competitions, and numerous other events and festivals. As well, summer and fall activities and festivals include weddings, fall festivals, hiking, mountain biking, scenic chairlift rides, and other popular activities. These events bring new visitors to the region and provide media exposure to potential customers to visit in the future.

### **Health and Wellness Benefits**

Skiing provides one of the few opportunities for outdoor recreation during the winter, a season in which many people stay inside and exercise less. All participants, from kids to Baby Boomers and beyond, reap positive health benefits from skiing and snowboarding. The importance of providing opportunities for exercise cannot be overstated, especially as more Americans become overweight and obese. For example, Wachusett Mountain Ski Area in Massachusetts recently partnered with Fallon Community Health Plans to allow members to use their fitness reimbursement towards ski lift tickets and lessons. The health benefits of skiing and snowboarding are clearly of vital importance.

## **Economic Value Conclusion**

This Economic Value Analysis provides a conservative estimate of the value of the ski resort industry in the State of North Carolina. Through direct and indirect value, the ski resort industry plays a critical role in the North Carolina economy, particularly during the mid-November through March period of the year when other segments of the tourism economy are at a seasonal lull.

The major conclusions of this Economic Value Analysis are as follows:

- Direct Value for the 2014/15 winter season was **\$119.5 million**
- Indirect and Induced Value for the 2014/15 winter season was **\$77.7 million**.
- Total Economic Value, the sum of direct and indirect/induced value, is **\$197.2 million**.

Skiing and snowboarding facilities draw residents and visitors to areas with such services and amenities, and they are frequently the anchor economic impetus to the communities in which they operate (which tend to be more rural), as well as to nearby commercial and residential development, including enhanced property values and higher property tax collections. The **overall economic value of the ski resort industry to the State of North Carolina was \$197.2 million** for the 4-month period covering the 2014/15 season. Other important benefits not included in this Economic Value Analysis include Quality of Life impacts, Health and Wellness impacts, Events and Exposure, and additional special programs.



## Additional Research Findings

The visitor survey covered additional topics beyond visitor spending. Some of the highlights from these additional questions, including visitor demographics and geographic origin, visitor satisfaction, and other visitor characteristics, are summarized here.

### Ski Area Visitor Demographics

The results of the on-site visitor surveys provide a comprehensive view of skiers and snowboarders in North Carolina. This section portrays some of the highlights of the visitor demographics and other visitor information.

In general, the customer at North Carolina ski areas tends to be **singles or families, most aged 55 or younger** (average age is 36.4 years, with a median of 37 years). The gender split is 55 percent male/45 percent female. Household incomes are moderately high, with 44 percent of the customer base in the \$50,000 to \$150,000 range. Twenty-seven percent earn more than \$150,000 annually, while 29 percent report making less than \$50,000 per year.

Most visitors were in a group of two to five people, though some larger groups were recorded in the survey research. **The average group size was 6.8 people**, with a median of 4 people (and 5.6 of those people actually skiing or snowboarding on the trip). Groups are an important component of the business at many North Carolina ski areas.

### Skier/Snowboarder Characteristics

In terms of ability levels, a **high proportion of visitors are first time skiers/snowboarders** (16 percent) or beginners (17 percent). The largest group is of intermediate ability – 25 percent low intermediate and 26 percent high intermediate. Also, 11 percent were advanced skiers/snowboarders and 6 percent were experts. Importantly, **43 percent said that the trip was a first time skiing/snowboarding experience for someone in their party**. These results show that the ski areas in North Carolina play an important role in the industry in introducing people to skiing and snowboarding for the first time.

The **majority of survey respondents were skiing** (62 percent), while most of the remainder (32 percent) were snowboarding. A few survey respondents were participating in other activities, including tubing and ice skating. This report includes information from all survey participants, regardless of the type of equipment/activity they were doing that day.

**More than half the ski area visitors were in the area as part of an overnight trip away from their home (58 percent)**. Thirty-one percent were day visitors, while 11 percent were residents of the local area. This result shows a healthy mix of customers, and illustrates the extent to which the ski industry attracts visitors who spend money in the region and the state.

Looking only at overnight visitors, most drove from home to reach the ski area (93 percent), though three percent rode a chartered bus. The average number of nights stayed on the trip was 3.0, with an average of 2.1 days skiing/snowboarding.

The ski resorts in North Carolina generate many visitors to the area and to the state as a result of skiing and snowboarding. ***Eighty-eight percent said that skiing/snowboarding was the primary reason for the trip to the North Carolina mountains***, an impressive statistic that indicates these visitors would not have come without the ski resorts.

## Geographic Residence

The geographic origin of all skiers and snowboarders in North Carolina shows that ***42 percent reside in-state and 58 percent visit from out-of-state***. The most important states are neighboring Georgia (17 percent), Florida (15 percent), South Carolina (14 percent), and Tennessee (6 percent).

Table 6  
Top States, 2014/15 Season

State	Percent of Visits
North Carolina	42%
Georgia	17%
Florida	15%
South Carolina	14%
Tennessee	6%
Alabama	2%
Virginia	1%
Texas	1%
All Other States	3%

Looking at market areas, about ***one-fifth of all skiers and snowboarders live in the Charlotte area*** (22 percent), followed by ***Atlanta*** (13 percent), ***Greenville-Spartanburg-Asheville*** (11 percent), ***Raleigh-Durham*** (9 percent), and ***Greensboro-Winston Salem-High Point*** (5 percent). Smaller contributors include Miami-Fort Lauderdale (3.5 percent), Orlando-Daytona-Melbourne, (3.4 percent), Columbia (3.0 percent), Charleston (2.8 percent), the Tri-Cities of Bristol-Kingsport-Johnson City (2.4 percent), Knoxville (2.3 percent), Jacksonville-Brunswick (2.3 percent), and Tampa-St. Petersburg (2.0 percent). These results show a geographically diverse customer base and illustrate the broad appeal of skiing and snowboarding in North Carolina.

*Table 7*  
*Top Markets, 2014/15 Season*

<b>Market Area</b>	<b>Percent of Visits</b>
Charlotte, NC	21.9%
Atlanta, GA	13.1%
Greenville - Spartanburg - Asheville – Anderson, SC	10.9%
Raleigh - Durham (Fayetteville), NC	9.3%
Greensboro - High Point - Winston-Salem, NC	5.1%
Miami - Fort Lauderdale, FL	3.5%
Orlando - Daytona Beach – Melbourne, FL	3.4%
Columbia, SC	3.0%
Charleston, SC	2.8%
Tri-Cities, TN/VA	2.4%
Knoxville, TN	2.3%
Jacksonville, Brunswick, FL/GA	2.3%
Tampa - Saint Petersburg (Sarasota), FL	2.0%
All Others	18.1%

## Other Survey Information

The survey results contain various other important information topics, including the timing of trip planning, media sources used, ticket type used, and other information.

Overnight visitors were asked when they began planning their visit. The trip planning time horizon is broadly spread, generally between one week and three months ahead of time. Overall, 22 percent of overnight visitors planned their visit less than a week ahead of time, with an additional 13 percent planning one to two weeks in advance, 18 percent two weeks to one month, 21 percent one to two months, and 10 percent two to three months in advance. The remaining 16 percent planned more than 3 months ahead of time.

All visitors were asked about the information sources they used to plan their visit. Most commonly, people cited a prior visit (47 percent) or talking to friends/family (28 percent). Other top sources were calling the ski area directly for information prior to their trip (14 percent). Five percent used the [www.goskinc.com](http://www.goskinc.com) website, while 14 percent used another website in planning their visit. Other information sources were used only modestly, including social media (4 percent), a NC Ski brochure/guide (2 percent), a travel agent (2 percent), a Ski North Carolina TV ad (1 percent), or a ski club publication (1 percent).

More than half of survey respondents said they were using a full-day lift ticket (58 percent), followed by a half-day ticket (17 percent). Nine percent had a twilight ticket and 8 percent were skiing/boarding during a night session. Just 6 percent had a season pass and five percent were using a multi-day ticket. Additionally, 5 percent were using a ticket that was part of a group package.

The frequency of skiing and snowboarding is relatively low, consistent with the high proportion of first timers/beginners and low proportion of season pass holders. The average number of total days skied/snowboarded this season was 7.3 days (median of 3), with an average of 6.2 days at ski areas in North Carolina (median of 2), and 5.2 days at the ski area where the survey was taken (median of 2). These results suggest a high level of infrequent customers, which has two implications for the state's ski areas. One is the observation that North Carolina ski areas have experienced success in drawing new customers to the slopes, an impressive achievement and important for the future growth of skiing and snowboarding. On the other hand, this dynamic presents a challenge in that the state's ski areas need to spend resources to market and prospect to new customers. Efforts to get these visitors to return and ski/snowboard more frequently might be considered as a priority for ski areas in the state.

## About RRC Associates

RRC Associates is a multi-disciplinary consulting firm providing market research, strategic analysis, and community/land planning services. RRC specializes in collecting and analyzing customer feedback for a variety of public and private clients nationwide and internationally. Research techniques we utilize are customized to clients' needs, but often incorporate web-based surveys; national and regional panels; intercept, telephone, and mail back surveys; and/or focus groups. Our office also operates a focus group facility specializing in qualitative research, the Boulder Focus Center.

RRC is the leading consulting and market research firm in the alpine snowsports industry and tracks many statistics and figures for the industry throughout North America. RRC publishes annually on behalf of the National Ski Areas Association (NSAA) the Kottke End of Season Report, the National Demographic Study, and the Economic Analysis of US Ski Areas, three industry reports that track patterns of significance related to operational, demographic, and financial information, respectively. Our firm also collects national figures for the ski resort industry in Canada, giving us an unprecedented depth of understanding of the North American snowsports industry.

Principal areas of focus by RRC include the ski and snowboard industry in particular, and the travel, tourism, and recreation industries generally. In these subject areas the firm is considered national experts and are frequently quoted and contacted for information concerning trends and opportunities. RRC also provides consulting services in real estate feasibility and market demand analysis, financial consulting and modeling, data base management, competitive analysis, customer demographic profiling, and customer satisfaction/loyalty assessments. Additionally, RRC provides a wide range of community planning, land planning, public processing, and affordable housing studies for a variety of public agencies and communities as well as private entities.