

North Carolina Ski Areas Association

2019/20 Economic Value Analysis



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Introduction

This report summarizes the findings of an Economic Value Analysis Study of the sports of alpine skiing and snowboarding in the state of 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 U.S. 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 across the Southeastern U.S. 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 as such, 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 (a) surveys of skiers and snowboarders at North Carolina ski areas and (b) a survey of the state's ski area operators. The guest surveys profiled visitors in terms of demographics, geographic origin, satisfaction, and expenditure patterns, among other details. The survey of ski area operators documented total volume of business (skier and tubing 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 2019/20 winter season was **\$138.2 million**
- Indirect and Induced Value for the 2019/20 winter season was **\$89.8 million**
- Total Economic Value, the sum of direct and indirect/induced value, was **\$228 million**

The overall economic value of the ski resort industry to the state of North Carolina was \$228 million for the period covering the 2019/20 winter 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.

Research Methods

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

A second survey was administered during the 2019/20 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 other items. 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 completed surveys were statistically weighted to be proportionate to the skier visits at the respective ski areas, making the overall results more representative. A total of 1,964 surveys were collected during the season, which represents a very good quantity of surveys for this study¹.

In contrast 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.

¹For the total sample size of 1,964 interviews conducted, the margin of error is +/- 2.2 percent (for the 95 percent confidence interval). Note that the margin of error is different for each question 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 6 operating ski areas which provide a wide variety of opportunities for snowsports enthusiasts. The ski areas are in the mountainous western part of the state, as illustrated in the map on the brochure below.

Figure 1
Ski Areas of North Carolina – NCSAA Brochure

1 Appalachian Ski Mtn.
The NC High Country's 1st ski area. Renowned for teaching beginners, families and groups how to ski since 1962. Home of the French Swiss Ski College, the South's largest independent ski school and Skiwest. 2,850 sets of ski, snowboard and skiboard rentals. Offering NC's only Flex Ski ticket and only late-night skiing. Snowmaking on all slopes, mostly after operating hours. Jacket, Bib, gloves, goggles and helmet rentals. 3 terrain parks, refrigerated outdoor ice skating rink, 46,000 sq. ft. Bavarian-style lodge with wireless internet and 200' observation deck. Restaurant with fireplace overlooking slopes, Ski Shop, Gift Shop, nursery, locker room, TV lounge and group meeting rooms. Ski & Stay packages including ski-in/ski-out chalet rentals. Open 7 days and nights, mid-November to late March. 2 miles off 4-lane US Hwy. 321 between Blowing Rock and Boone. Closest resort to Charlotte, Winston-Salem and Raleigh.

STATS: - Peak Elevation: 4,000 ft. - 12 Slopes - Ice Skating
- Base Elevation: 3,635 ft. - Lifts: 2 Quads, 1 Double
- Vertical Rise: 365 ft. 1 Surface, 2 Conveyors

940 SKI MOUNTAIN RD. - PO BOX 106 - BLOWING ROCK, NC 28605
828-295-7828 - 800-322-2373 - 828-295-3277 (Fax)
info@appskmtn.com - www.appskmtn.com - www.oppterrainpark.com

2 Sugar Mountain Resort
Sugar Mountain Resort features a high-speed six passenger chairlift and Whoopdeedee, a double black diamond slope. Enjoy skiing and snowboarding on 125 acres, and snowshoeing day and night. State-of-the-art snowmaking covers all 21 slopes, including all terrain park. The winter sports schools accommodate all ages and abilities including half or full-day programs for kids. The rental shop specializes in top of the line equipment. Sugar has an easy access tubing park with several 700' lanes and a 10,000 sq. ft. outdoor ice-skating rink. The base lodge houses two cafeterias, the Last Run Lounge, a group sales department, a locker room, and the Sugar Mountain Sports & Gift Shop. Midweek winter value packages and special events are available for just about anyone. Summer fun includes weekend chairlift rides, a bike park, the Summit Crawl and Oktoberfest. Located just off NC Hwy. 184.

STATS: - Peak Elevation: 5,300 ft. - Lifts: 1 Triple, 3 Doubles, - Ice Skating
- Base Elevation: 4,100 ft. 1 High Speed Six Pack, 1 Tubing
- Vertical Rise: 1,200 ft. 1 High Speed Quad, 1 Snowshoeing
- 21 Slopes 1 Surface, 1 Carpet Conveyor

1009 SUGAR MTL. DR. - PO BOX 369 - BANNER ELK, NC 28604
828-898-4521 - 800-SUGARMT
info@skisugar.com - www.skisugar.com

3 Beech Mountain Resort
At 5,506 feet in elevation, Beech Mountain Resort remains the highest ski area in the East. To supplement the annual snowfall of over 80 inches, Beech has extensive snowmaking capabilities that cover 100% of the skiing terrain. There is a large variety of skiable acres including terrain parks. Beech has lighting and is open for night skiing. A favorite with families, Beech offers skiing, snowboarding, or skating on a 7,000 sq. ft. outdoor ice rink. Skiing and snowboarding instructions are available for all ability levels, and there is a program for youths that includes equipment rental, a hot lunch, and a day of instruction in proper ski and snowboard technique. Also on-site are equipment and clothing rentals, shopping, dining, and nightlife. Group rates are available. Accommodations, including chalet rentals and inns, are close by. Beech offers a 750' tubing facility, with night lanes.

STATS: - Peak Elevation: 5,506 ft. - 17 Slopes, 1 Terrain Park - Ice Skating
- Base Elevation: 4,675 ft. - Lifts: 3 Fixed Grip Quads, 1 Tubing
- Vertical Rise: 830 ft. 3 Doubles, 1 Carpet Conveyor, 1 Rope Tow

BEECH MTL. PARKWAY - PO BOX 1118 - BANNER ELK, NC 28604
828-387-2011 - 800-438-2093
info@skibeech.com - www.beechmountainresort.com - #beechmtn

4 Cataloochee Ski Area
One of the first areas to open each season, Cataloochee is committed to making your skiing experience the best it can be. Utilizing one the most advanced snowmaking systems in the Southeast on 18 highest slopes, 5 lifts including 2 moving carpet lifts, and 4,000 sets of snowsports equipment. Cataloochee has something for everyone. Ski School for all ages and abilities, including our CAT Kids Ski & Ride Center for ages 4-12. Group rates for pre-reserved groups of fifteen or more. Fireplace, restaurant, lounge and on-mountain shop are located in the lodge. Cataloochee Ski & Sports Shop in Maggie Valley offers discounted rentals, lift tickets as well as everything you need for a day on the slopes. Tube World in Maggie Valley has 12 lanes of snow tubing fun! Easy 4 lane access, 40 minutes from Asheville with great midweek packages makes economical winter fun closer than you think!

STATS: - Peak Elevation: 5,400 ft. - 18 Slopes - Tubing
- Base Elevation: 4,640 ft. - Lifts: 1 Double, 1 Triple, 1 Quad, 3 Carpet Conveyors
- Vertical Rise: 740 ft.

1080 SKI LODGE RD. - MAGGIE VALLEY, NC 28751
828-926-0285 - 800-768-0285
ski@cataloochee.com - www.cataloochee.com - www.kidsofthefire.com

5 Wolf Ridge Ski Resort
Wolf Ridge Ski Resort is NC's most accessible ski slope located just 5 miles from I-26 (Wolf Laurel East #3) and only 30 minutes north of Asheville, NC. Wolf Ridge is a family-oriented resort and offers everything from beginner to expert slopes. Lighted slopes offer nighttime skiing and snowboarding. Featuring wide open terrain and beginner-friendly grades within the teaching areas. Our Snow Sports School offers group lessons for skiers and snowboarders ages 8 and up and private lessons for ages 5 and up. The Lodge overlooking the slopes offers 3 breakfasts, cafeteria, gift shop, rental shop and the group sales department. Group rates available for pre-reserved groups of fifteen or more. Midweek specials offer incentives to get out and ride the Wolf!

STATS: - Peak Elevation: 4,700 ft. - 15 Slopes - Tubing
- Base Elevation: 4,000 ft. - Lifts: 1 Quad, 1 Double, 2 Surface
- Vertical Rise: 700 ft.

578 VALLEY VIEW CIRCLE - MARS HILL, NC 28754
828-689-4111 - 800-817-4111
marketing@skiwolfridge.com - www.skivolfridge.com

6 Sapphire Valley Ski Area
The Sapphire Valley ski slopes are an integral part of a 5,700 acre four-season resort nestled in the North Carolina Blue Ridge Mountains. Sapphire Valley is the closest North Carolina ski hill to Atlanta, GA and is an excellent opportunity for a day trip. The intimate nature of our ski hill and short lift lines make Sapphire Valley a popular choice amongst families and beginning skiers. Our state of the art quad chair lift means the guest can optimize the number of runs they take and our lift tickets are good for the whole day. The main hill is 1,600 feet in length with a 200 foot vertical drop and is very skiable for all ages. We offer skiing, snowboarding and tubing at the most affordable rates in the state. Lessons and group discounts are also available.

STATS: - Peak Elevation: 3,400 ft. - 2 Slopes
- Base Elevation: 3,200 ft. - Lifts: 1 Quad, 2 Carpet Conveyors
- Vertical Rise: 200 ft. - Tubing

217 SAPPHIRE VALLEY RD. - SAPPHIRE, NC 28774
828-743-7663 (Main) - 828-743-1169 (Hotline)
svmo@aol.com - www.skisapphire.com

Wintertime fun!
Southern Snow
The mountains of North Carolina have the highest elevations and the coldest climates in the South. So, don't let your hometown weather fool you into thinking that the conditions in the mountains are the same. With every thousand-foot rise in elevation there's usually a 3 or 4 degree drop in temperature, making the mountain areas about 15 to 20 degrees cooler than lower elevations. To supplement an average snowfall of 70 inches, North Carolina Ski Areas' state-of-the-art snowmaking capabilities provide 100% slope coverage. When temperatures fall below freezing, we take advantage of these opportunities to help create fantastic conditions.

Of the six ski areas in the North Carolina ski resort industry, four returned surveys about their operations. Assumptions were made to project the results from the remaining two ski areas, allowing for total state figures to be estimated. Unless otherwise specified (e.g. capital expenditures, below), all statewide totals in this report reflect *all six* of North Carolina's ski areas. Table 1 below outlines some of the key operational and financial statistics regarding the North Carolina ski resort industry during the 2019/20 fiscal year.

Table 1
Key Statewide Statistics for North Carolina ski areas, 2019/20 FY

2019/20 Statistics	
Total Skier/Snowboarder Visits	631,241
Total Gross Revenue, Resort Operations	\$49,131,417
Year-Round Employees (includes both FT/PT)	91
Seasonal Employees (includes both FT/PT)	1,415
Capital Expenditures (from the 4 responding ski areas)	\$7,851,672

As seen in the table above, the ski area industry in North Carolina provides **91 year-round jobs and 1,415 seasonal jobs. In 2019/20, the industry generated over \$49 million in gross revenue from ski area operations**, including lift tickets and season passes, lessons, equipment rental, retail stores, food & beverage (which is a concession at some North Carolina ski resorts), and other operating departments. Resorts also invested nearly \$8 million on capital expenditures, including new and upgraded lifts, on-mountain facilities, and summer/fall facilities.

While most North Carolina ski areas do not own or operate onsite lodging accommodations, the industry is responsible for many overnight stays in local commercial lodging and private accommodations (rent-by-owner or managed by property management firms). Thus the snowsports industry is responsible for additional economic benefit through gross lodging revenues (and associated lodging tax 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.).

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 immediate travel group spent (on the trip during which they were surveyed) for a variety of categories, including lift tickets (26.4 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/retail purchases, non-ski entertainment/activities, and other spending. This section of the report details these results.

Table 2
Average Spending per Person, 2019/20 Ski Season

Type of Expenditure	Per Person Spending	Percent of Total
Lift tickets	\$57.71	26.4%
Restaurants/food and beverage at the mountain	\$18.91	8.6%
Restaurants/food and beverage in town	\$22.98	10.5%
Ski/snowboard lessons	\$9.01	4.1%
Equipment rentals	\$20.76	9.5%
Shopping/retail purchases (apparel, gifts, souvenirs, magazines, etc.)	\$13.60	6.2%
Lodging/accommodations	\$62.54	28.6%
Non-ski activities (tubing, ice skating, spa, etc.)	\$6.90	3.2%
Other (incidentals, tips, sundries, etc.)	\$6.44	2.9%
TOTAL PER PERSON SPENDING	\$218.87	100%

Results for total group expenditures for the ski trip 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 above. The sum of all the categories results in a total per person expenditure figure for the visit. As shown in Table 2, ***the average total expenditure per person within the state of North Carolina during winter 2019/20 was \$218.87.***

The per person expenditures outlined above are then multiplied by the total skier visit figure for the state in 2019/20 (631,241 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 \$138.2 million in direct expenditures*** during the 2019/20 winter season.

Table 3
Total Direct Expenditures, 2019/20 Ski Season

Type of Expenditure	Total Direct Expenditures
Lift tickets	\$36,430,719
Restaurants/food and beverage at the mountain	\$11,934,344
Restaurants/food and beverage in town	\$14,507,797
Ski/snowboard lessons	\$5,689,895
Equipment rentals	\$13,103,742
Shopping/retail purchases (apparel, gifts, souvenirs, magazines, etc.)	\$8,586,972
Lodging/accommodations	\$39,480,908
Non-ski activities (tubing, ice skating, spa, etc.)	\$4,354,451
Other (incidentals, tips, sundries, etc.)	\$4,067,836
TOTAL DIRECT SPENDING	\$138,156,665

Visitor Expenditures On-Mountain vs. Off-Mountain

Skiers and snowboarders make expenditures associated with their ski trip at both the ski area as well as at other businesses in the community (including lodging properties, restaurants, retail stores, equipment rental shops, and other local businesses). This spillover effect of spending in the local community is important to document via this Economic Value study.

The majority of skier/snowboarder spending occurs off-mountain, with 53 percent of expenditures (\$115.69 per person) accruing to business in the local area. 47 percent, or \$102.91 per person, of skier/snowboarder spending happens at the ski area itself. These results show the importance of ski areas in North Carolina to their local economies.

*Table 4
Per Person Expenditures On-Mountain vs. Off-Mountain, 2019/20 Ski Season*

Type of Expenditure	Per Person Spending	Percent of Total
On-mountain spending	\$102.91	47%
Off-mountain spending	\$115.96	53%
TOTAL PER PERSON SPENDING	\$218.87	100%

Secondary Economic Effects

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 locally. 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.

As outlined above, direct spending was estimated to be \$138.2 million. Taking the multiplier (1.65) into account, the **total economic value of the ski area industry to North Carolina is \$228 million.**

The study done in 2014/15 estimated a total value of \$197.2 million, with the same multiplier used. The 2019/20 economic value figure is 15.6 percent higher than the 2014/15 number, indicating average annual growth of 2.9 percent over the past 5 winters. 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 somewhat different methodologies were used to collect the information in prior seasons.

*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
2018/19	607,547	\$42.8	\$10.7	1,443
2019/20	631,241	\$49.1	\$11.1	1,506

Source: Surveys of Ski Area Owners/General Managers

Despite the COVID-19 crisis resulting in early spring resort closures, the 2019/20 season was a strong season for North Carolina ski areas – up year-over-year from 2018/19 in most aspects. Grand totals for the state include 631,241 skier visits, resort revenue exceeded \$49 million, and total payroll was \$11.1 million for 1,506 full-time and part-time employees.

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. 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. 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 2019/20 winter season was **\$138.2 million**
- Indirect and Induced Value for the 2019/20 winter season was **\$89.8 million**
- Total Economic Value, the sum of direct and indirect/induced value, was **\$228 million**

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.

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 \$228 million for the 4-month period covering the 2019/20 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 Visitor 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

A **high proportion of visitors are first-time or beginner skiers/snowboarders** (a combined total of 37 percent). The largest group is of intermediate ability, with a combined total of 50 percent of respondents self-identifying as low intermediate or high intermediate skiers/boarders. An additional 9 percent were at an advanced skill level and 4 percent were experts. Importantly, nearly half (47 percent) said that the trip was a first-time skiing/snowboarding experience for someone in their party, up from 43 percent in prior seasons. These results show that the ski areas in North Carolina play an important – and perhaps increasing – role within the overall snowsports industry in introducing people to skiing and snowboarding for the first time.

The majority of survey respondents were skiing (62 percent), while 44 percent were snowboarding. A few survey respondents were participating in other activities, including tubing (7 percent) and ice skating (5 percent)². This report includes information from all

² Note, respondents were permitted to select more than one answer, if they had used multiple types of equipment on the day they were surveyed.

survey participants, regardless of the type of equipment used / activity they were doing that day.

The **largest share of respondents were overnight visitors, spending at least one night away from home** (44 percent, down from 58 percent in 2014/15 and 51 percent in 2009/10). Thirty-six percent were day visitors, while 21 percent were residents of the local area (up from 11 percent in both 14/15 and 09/10). 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 (88 percent) drove from home to reach the ski area, though 9 percent flew, up significantly from prior seasons. The average number of nights stayed on the trip was 2.8, with an average of 1.9 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-five percent said that skiing/snowboarding was the primary reason for the trip to the North Carolina mountains**, a notable statistic that indicates a majority of visitors would likely not have come without the ski resorts.

Geographic Residence

The geographic origin of all skiers and snowboarders in North Carolina shows that over half (56 percent) reside in-state, and 44 percent visit from out-of-state. The top states are neighboring Georgia (12 percent), South Carolina (10 percent), Florida (10 percent), and Tennessee (6 percent).

Table 6
Top States, 2019/20 Season

State	Percent of Visits
North Carolina	56.0%
Georgia	12.0%
South Carolina	10.1%
Florida	9.7%
Tennessee	6.2%
Alabama	1.7%
Virginia	0.9%
Texas	0.5%
All Other States/Countries	2.9%

Looking at market areas, over one-quarter of all skiers and snowboarders live in the Charlotte area (27 percent), and nearly one-fifth (19 percent) live in the Greenville – Spartanburg – Asheville – Anderson area. This is followed by Atlanta (9 percent), Raleigh – Durham (8 percent), and Greensboro – High Point – Winston Salem (5 percent). Smaller contributors include Orlando – Daytona Beach – Melbourne (2.6

percent), the Tri-Cities of Bristol – Kingsport – Johnson City (2.6 percent), Columbia (1.8 percent), Tampa – St. Petersburg (1.4 percent), Knoxville (2.1 percent), Miami – Fort Lauderdale, Jacksonville – Brunswick (2.1 percent), and Charleston (2.1 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, 2019/20 Season*

Designated Market Area	Percent of Visits
Charlotte -- NC, SC	27.4%
Greenville - Spartanburg - Asheville - Anderson -- GA, NC, SC	18.7%
Atlanta -- AL, GA, NC	9.0%
Raleigh - Durham (Fayetteville) -- NC, VA	7.5%
Greensboro - High Point - Winston-Salem -- NC, VA	4.9%
Orlando - Daytona Beach - Melbourne -- FL	2.6%
Tri-Cities -- KY, TN, VA	2.6%
Columbia -- SC	1.8%
Tampa - Saint Petersburg (Sarasota) -- FL	1.4%
Knoxville -- KY, TN	2.1%
Miami - Fort Lauderdale -- FL	1.7%
Jacksonville, Brunswick -- FL, GA	2.1%
All Others	15.9%

Other Visitor Information

The survey results contain various other important information topics, including trip planning details, frequency of snowsports visits, ticket type used, satisfaction with various resort aspects, and demographic information.

All visitors were asked how they found out about the ski area they were visiting. Most commonly, people cited informal means – a prior visit (47 percent) or talking to friends/family (37 percent). Other top sources were internet searches (21 percent) and social media (13 percent). An additional 12 percent called the ski area directly, 4 percent used the NC ski brochure / vacation guide, and 4 percent used a travel agent. Other information sources were used only modestly (see tables in the appendix for full details).

More than half of survey respondents (55 percent) said they were using a full-day lift ticket, followed by a half-day ticket (14 percent). Nine percent were using a season pass, 9 percent had a twilight ticket, 4 percent were tubing, and 3 percent were skiing/boarding during a night session.

Consistent with the high proportion of first timers/beginners and low proportion of season pass holders, the frequency of skiing and snowboarding is relatively low among visitors. The average number of total days skied/snowboarded this season (at any resort) was 8.9 days (median of 4), with an average of 7.8 days at ski areas in North Carolina (median of 3), and 5.9 days at the specific ski area where the survey was taken (median of 2).

While the number of ski days has increased since the last survey in 2014/15 (average 7.3 days total, 6.2 days in NC and 5.2 days at the resort surveyed), these results still suggest a high number of infrequent customers. This has several implications for the state's ski areas:

1. 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.
2. 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.
3. A third consideration is that North Carolina skiers may "graduate" to skiing or snowboarding at larger resorts/regions in the US, after initial exposure to snowsports at one of the six resorts within the state. While this phenomenon is anecdotal at present, it implies an even broader impact of North Carolina's ski industry than calculated here, insomuch as bringing new participants into the sport is crucial to the overall health and growth of the national snowsports industry.

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.

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.

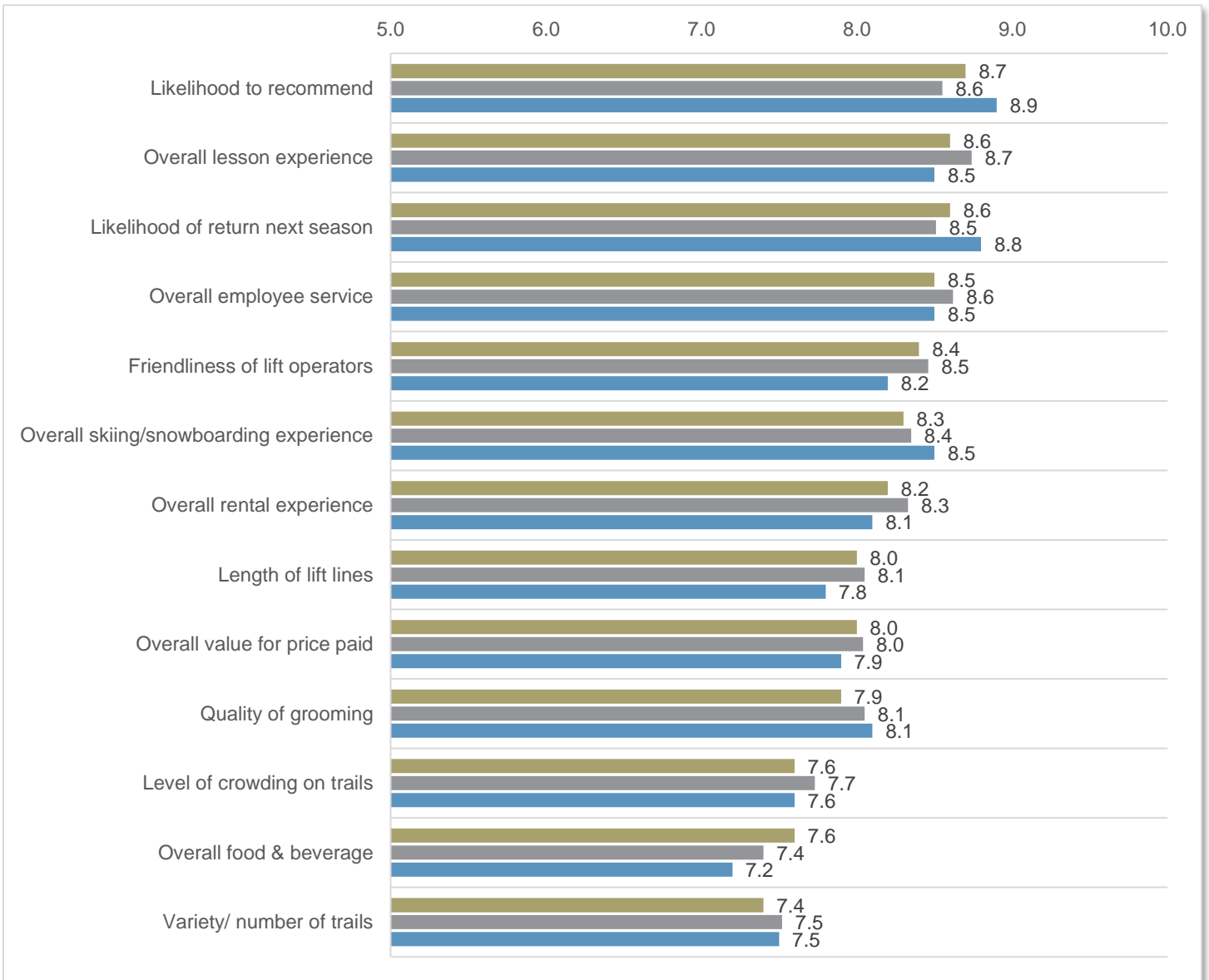
Principal areas of focus by RRC include the ski and snowboard industry in particular, and the travel, tourism, parks and recreation industries generally. In these subject areas the firm is considered national experts and are frequently quoted and contacted for information concerning trends and opportunities. 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.

Appendix A: Additional Results, 2019/20

Table A1
Other Statewide Statistics for North Carolina ski areas, 2019/20 FY

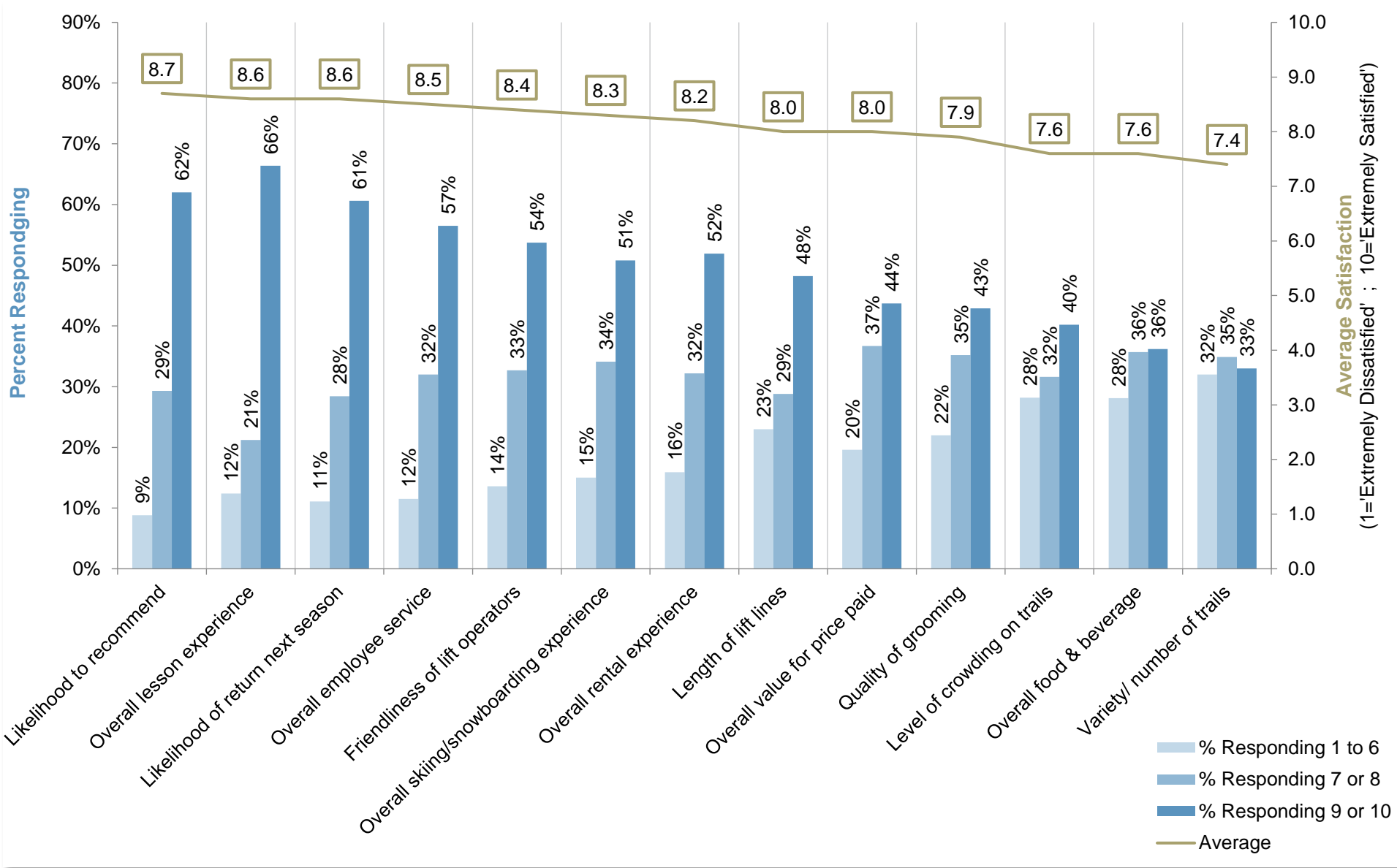
2019/20 Statistics	
Avg Total Days Open (based on the 4 responding resorts)	122 days
Total Tubing Visits (5 resorts offer tubing)	45,263
Total Ice Skating Visits (3 resorts offer skating)	19,898
Avg Gross Ski Area Revenue per Skier Visit (based on the 4 responding resorts)	\$81.75
Avg Percent of Revenue from Summer Operations (4 responding resorts)	2.8%

*Table A2
Average Visitor Satisfaction Ratings – 2019/20, 2014/15, and 2009/10 Comparison*



LEGEND			
Season	NC Skier Visits	Avg. Snowfall (NC Resorts)	Avg. Snowfall (Southeast US)
2019/20	631,241	49"	30"
2014/15	653,654	39"	70"
2009/10	671,554	113"	101"

Table A3
Visitor Satisfaction Ratings – 2019/20



Appendix B: Statistical Tables

North Carolina Ski Areas Survey 19/20

		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Visitor Type	An overnight visitor (spending at least one night away from your primary residence)	44%	58%	51%
	A day visitor to this ski area (returning home tonight)	36%	31%	38%
	A resident of the local area	21%	11%	11%
TOTAL		100%	100%	100%
	n =	1,927	1,685	1,494
Is skiing/snowboarding the primary reason for this trip to the North Carolina mountains?	Yes	85%	88%	90%
	No - other reason	15%	12%	10%
TOTAL		100%	100%	100%
	n =	1,917	1,708	1,484

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Overnight Visitors		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
What was your main mode of transportation to this ski area?	Drove from home	88%	92%	92%
	Flew	9%	3%	2%
	Chartered bus	3%	3%	5%
	Other	0%	2%	1%
TOTAL		100%	100%	100%
	n =	840	977	808
How many nights are you staying in the area this trip? [cap of 28 nights]	1 night	13%	12%	17%
	2 nights	39%	34%	34%
	3 nights	27%	29%	26%
	4-5 nights	15%	15%	17%
	6-9 nights	4%	8%	6%
	10+ nights	1%	1%	1%
TOTAL		100%	100%	100%
Average		2.8	3.0	2.8
n =		839	973	813
How many days will you ski or snowboard on this trip? [cap of 28 days]	None	1%	0%	0%
	1 day	38%	28%	30%
	2 days	43%	47%	44%
	3 days	13%	15%	18%
	4-5 days	4%	8%	7%
	6+ days	1%	3%	2%
TOTAL		100%	100%	100%
Average		1.9	2.2	2.1
n =		846	979	810

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

<i>All Respondents</i>		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Not including this visit, how many times have you skied/snowboarded at ANY North Carolina ski area in the past 5 years? [cap of 100 times]	None, this is my first time	32%	32%	26%
	Once	6%	10%	11%
	Twice	8%	9%	10%
	3-5 times	16%	20%	21%
	6-9 times	7%	6%	6%
	10 times	7%	6%	6%
	11-19 times	6%	5%	5%
	20 times	6%	3%	3%
	More than 20 times	12%	8%	13%
TOTAL		100%	100%	100%
Average		9.7	7.9	11.5
n =		1,871	1,729	1,454
Not including this visit, how many times have you skied/snowboarded at THIS ski area in the past 5 years? [cap of 100 times]	None, this is my first time	38%	40%	34%
	Once	7%	12%	13%
	Twice	9%	9%	11%
	3-5 times	16%	19%	18%
	6-9 times	7%	5%	5%
	10 times	6%	3%	5%
	11-19 times	4%	5%	3%
	20 times	5%	2%	2%
	More than 20 times	8%	6%	10%
TOTAL		100%	100%	100%
Average		7.5	6.2	9.3
n =		1,899	1,726	1,443

29 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

<i>All Respondents</i>		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
How many total days will you ski/snowboard this season at ALL ski areas? (in any state/country) [cap of 120 days]	None	5%	2%	1%
	1 day	17%	19%	19%
	2 days	18%	25%	25%
	3 days	11%	11%	12%
	4-5 days	15%	14%	13%
	6-10 days	15%	13%	14%
	11-19 days	5%	5%	4%
	20-30 days	10%	7%	7%
	More than 30 days	5%	4%	5%
TOTAL		100%	100%	100%
Average		8.9	7.2	8.6
n =		1,924	1,729	1,486
How many of those total days will be at North Carolina ski areas? [cap of 120 days]	None	4%	2%	1%
	1 day	21%	21%	21%
	2 days	20%	28%	27%
	3 days	12%	12%	13%
	4-5 days	15%	14%	14%
	6-10 days	12%	11%	11%
	11-19 days	4%	3%	4%
	20 or more days	13%	8%	10%
TOTAL		100%	100%	100%
Average		7.8	6.1	7.7
n =		1,926	1,721	1,476

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

<i>All Respondents</i>		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
How many of those total days will be at THIS ski area? [cap of 120 days]	None	5%	2%	2%
	1 day	27%	30%	27%
	2 days	24%	28%	28%
	3 days	10%	10%	13%
	4-5 days	13%	11%	12%
	6-10 days	10%	9%	8%
	More than 10 days	12%	9%	11%
TOTAL		100%	100%	100%
Average		5.9	5.1	6.3
n =		1,917	1,709	1,471

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

<i>All Respondents</i>		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
What type of equipment are you using today? (19/20 only: mark all that apply)	Alpine/downhill skis	62%	62%	62%
	Snowboard	44%	32%	33%
	Tubing	7%	1%	2%
	Ice skates	5%	2%	1%
	Other	1%	3%	2%
TOTAL		120%	100%	100%
	n =	1,950	1,724	1,473
What is your ability level on that equipment?	First time out	17%	16%	13%
	Beginner/Novice	20%	18%	25%
	Low Intermediate	26%	25%	40%
	High Intermediate	24%	26%	
	Advanced	9%	11%	16%
	Expert	4%	6%	6%
TOTAL		100%	100%	100%
	n =	1,793	1,710	1,485

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

<i>All Respondents</i>		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
What type of lift ticket/season pass are you using today? (mark all that apply)	Full-Day	55%	58%	53%
	Half-Day	14%	17%	16%
	Twilight	9%	8%	14%
	Season Pass	9%	6%	6%
	Night Session	3%	8%	9%
	Multi-Day	9%	5%	4%
	Group Package	3%	5%	4%
	Tubing	4%	1%	2%
	Ice Skating	3%	1%	2%
	Gold Card	2%	0%	1%
	Other	2%		
	Lodging Package	1%	1%	0%
TOTAL		114%	110%	111%
	n =	1,931	1,715	1,483

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

<i>All Respondents</i>		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
How did you find out about this ski area? (mark all that apply)	Previous Visit	47%	47%	
	Word of mouth / talked to family or friends	37%	29%	13%
	Called ski area directly	12%	14%	
	Internet search	21%		14%
	Other source (specify)	6%	13%	
	Social media (Facebook, Twitter, Instagram, etc.)	13%	4%	
	Other webpage	1%	14%	
	Travel agent	4%	2%	45%
	NC Ski brochure/vacation guide	4%	2%	20%
	GoSkiNC.com	2%	5%	
	Ski club publication	2%	1%	7%
	None of the above	2%		
	Mall video	0%		5%
TOTAL		152%	129%	105%
	n =	1,901	1,691	212

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Trip Spending		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Lift tickets	None	10%	15%	9%
	\$1 - \$49	10%	10%	13%
	\$50 - \$99	22%	18%	20%
	\$100 - \$149	14%	16%	16%
	\$150 - \$199	6%	7%	8%
	\$200 - \$299	14%	14%	12%
	\$300 - \$499	12%	11%	10%
	\$500+	12%	9%	12%
TOTAL		100%	100%	100%
Average		\$224	\$182	\$204
Median		\$120	\$100	\$100
n =		1,831	1,526	1,275
Restaurants/food and beverage at the mountain	None	11%	15%	14%
	\$1 - \$49	39%	33%	45%
	\$50 - \$99	25%	18%	14%
	\$100 - \$149	12%	13%	13%
	\$150 - \$199	3%	4%	2%
	\$200 - \$299	6%	9%	4%
	\$300 - \$499	3%	4%	4%
	\$500+	1%	3%	3%
TOTAL		100%	100%	100%
Average		\$72	\$91	\$81
Median		\$48	\$50	\$35
n =		1,831	1,526	1,275

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

<i>Trip Spending</i>		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Restaurants/food and beverage in town	None	35%	53%	52%
	\$1 - \$49	18%	13%	16%
	\$50 - \$99	13%	9%	10%
	\$100 - \$149	13%	8%	9%
	\$150 - \$199	3%	3%	2%
	\$200 - \$299	9%	7%	6%
	\$300 - \$499	6%	4%	3%
	\$500+	4%	3%	2%
TOTAL		100%	100%	100%
Average		\$90	\$70	\$61
Median		\$40	\$0	\$0
n =		1,831	1,526	1,275
Ski/snowboard lessons	None	69%	75%	76%
	\$1 - \$49	7%	6%	7%
	\$50 - \$99	8%	6%	7%
	\$100 - \$149	6%	5%	4%
	\$150 - \$199	3%	2%	1%
	\$200 - \$299	3%	3%	2%
	\$300 - \$499	2%	2%	1%
	\$500+	1%	1%	1%
TOTAL		100%	100%	100%
Average		\$37	\$32	\$29
Median		\$0	\$0	\$0
n =		1,831	1,526	1,275

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

<i>Trip Spending</i>		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Equipment rentals	None	35%	38%	38%
	\$1 - \$49	19%	16%	18%
	\$50 - \$99	16%	16%	16%
	\$100 - \$149	11%	10%	11%
	\$150 - \$199	4%	5%	4%
	\$200 - \$299	8%	7%	5%
	\$300 - \$499	5%	5%	4%
	\$500+	3%	3%	4%
TOTAL		100%	100%	100%
Average		\$83	\$83	\$81
Median		\$40	\$35	\$30
n =		1,831	1,526	1,275
Shopping/retail purchases (apparel, gifts, souvenirs, magazines, etc.)	None	55%	65%	63%
	\$1 - \$49	11%	9%	10%
	\$50 - \$99	12%	7%	9%
	\$100 - \$149	10%	9%	10%
	\$150 - \$199	3%	1%	1%
	\$200 - \$299	5%	4%	4%
	\$300 - \$499	2%	3%	2%
	\$500+	1%	2%	1%
TOTAL		100%	100%	100%
Average		\$49	\$43	\$39
Median		\$0	\$0	\$0
n =		1,831	1,526	1,275

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Trip Spending		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Lodging/accomodations	None	57%	53%	59%
	\$1 - \$49	1%	2%	2%
	\$50 - \$99	2%	9%	10%
	\$100 - \$149	3%	11%	9%
	\$150 - \$199	3%	5%	4%
	\$200 - \$299	5%	9%	7%
	\$300 - \$499	8%	6%	5%
	\$500+	20%	5%	4%
TOTAL		100%	100%	100%
Average		\$266	\$113	\$91
Median		\$0	\$0	\$0
n =		1,831	1,526	1,275
Non-ski activities (tubing, ice skating, spa, etc.)	None	77%	86%	87%
	\$1 - \$49	4%	2%	4%
	\$50 - \$99	6%	3%	3%
	\$100 - \$149	5%	4%	3%
	\$150 - \$199	1%	0%	0%
	\$200 - \$299	4%	2%	1%
	\$300 - \$499	2%	1%	1%
	\$500+	1%	1%	2%
TOTAL		100%	100%	100%
Average		\$30	\$17	\$18
Median		\$0	\$0	\$0
n =		1,831	1,526	1,275

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

<i>Trip Spending</i>		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Other (incidentals, tips, sundries, etc.)	None	69%	95%	96%
	\$1 - \$49	10%	1%	1%
	\$50 - \$99	10%	1%	1%
	\$100 - \$149	6%	1%	0%
	\$150 - \$199	1%	1%	0%
	\$200 - \$299	2%	1%	0%
	\$300 - \$499	1%	1%	1%
TOTAL		100%	100%	100%
Average		\$23	\$7	\$5
Median		\$0	\$0	\$0
n =		1,831	1,526	1,275

26 May 20

Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Trip Spending		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Total Trip Spending by Entire Party	\$1 - \$99	11%	14%	17%
	\$100 - \$199	16%	16%	14%
	\$200 - \$299	12%	10%	12%
	\$300 - \$499	14%	15%	17%
	\$500 - \$749	10%	16%	13%
	\$750 - \$999	8%	9%	7%
	\$1,000 - \$1,499	10%	11%	9%
	\$1,500 - \$1,999	7%	5%	4%
	\$2,000+	12%	6%	6%
TOTAL		100%	100%	100%
Average		\$893	\$652	\$625
Median		\$450	\$420	\$359
n =		1,828	1,526	1,275
Total Trip Spending Per Person	\$1 - \$49	16%	24%	27%
	\$50 - \$99	19%	23%	23%
	\$100 - \$149	17%	15%	16%
	\$150 - \$199	10%	10%	11%
	\$200 - \$299	13%	13%	10%
	\$300 - \$499	14%	10%	8%
	\$500+	11%	6%	4%
TOTAL		100%	100%	100%
Average		\$223	\$171	\$149
Median		\$140	\$106	\$98
n =		1,801	1,473	1,198

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
How many people are in your immediate travel party? [cap of 20 people]	1	12%	6%	3%
	2	24%	22%	22%
	3	14%	13%	15%
	4	21%	22%	25%
	5	10%	12%	13%
	6	6%	8%	6%
	7	3%	3%	2%
	8	2%	3%	2%
	9	1%	2%	2%
	10 or more	7%	9%	9%
TOTAL		100%	100%	100%
Average		4.2	4.7	4.7
n =		1,915	1,632	1,357
Is this a first-time skiing/snowboarding experience for any member of your party?	Yes	47%	43%	43%
	No	53%	57%	57%
TOTAL		100%	100%	100%
	n =	1,928	1,673	1,449

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Ski Area Satisfaction Ratings (1 to 10 scale)		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Overall food and beverage	1 - Extremely Dissatisfied	0%	1%	1%
	2	1%	1%	2%
	3	2%	3%	3%
	4	4%	4%	6%
	5	9%	10%	11%
	6	12%	14%	12%
	7	16%	15%	16%
	8	19%	20%	22%
	9	16%	12%	11%
	10 - Extremely Satisfied	21%	21%	17%
TOTAL		100%	100%	100%
Average		7.6	7.4	7.2
n =		1,787	1,534	1,336
Friendliness of lift operators	1 - Extremely Dissatisfied	0%	1%	1%
	2	0%	1%	0%
	3	0%	1%	1%
	4	1%	1%	2%
	5	4%	4%	6%
	6	9%	7%	6%
	7	12%	10%	10%
	8	20%	19%	23%
	9	19%	21%	20%
	10 - Extremely Satisfied	35%	37%	32%
TOTAL		100%	100%	100%
Average		8.4	8.4	8.2
n =		1,804	1,614	1,398

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Ski Area Satisfaction Ratings (1 to 10 scale)		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Overall employee service	1 - Extremely Dissatisfied	0%	0%	1%
	2		0%	0%
	3	0%	1%	1%
	4	1%	0%	1%
	5	2%	3%	4%
	6	8%	6%	5%
	7	13%	9%	9%
	8	19%	20%	23%
	9	20%	22%	24%
	10 - Extremely Satisfied	37%	39%	33%
TOTAL		100%	100%	100%
Average		8.5	8.6	8.5
n =		1,866	1,656	1,426
Length of lift lines	1 - Extremely Dissatisfied	0%	2%	2%
	2	1%	2%	2%
	3	2%	3%	3%
	4	3%	3%	3%
	5	7%	6%	7%
	6	10%	6%	7%
	7	13%	9%	10%
	8	16%	15%	16%
	9	16%	19%	16%
	10 - Extremely Satisfied	32%	36%	33%
TOTAL		100%	100%	100%
Average		8.0	8.0	7.8
n =		1,821	1,601	1,402

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Ski Area Satisfaction Ratings (1 to 10 scale)		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Variety/number of trails	1 - Extremely Dissatisfied	0%	1%	1%
	2	1%	1%	2%
	3	2%	3%	3%
	4	4%	5%	4%
	5	12%	8%	8%
	6	13%	12%	10%
	7	17%	12%	15%
	8	17%	18%	19%
	9	15%	16%	15%
	10 - Extremely Satisfied	18%	24%	24%
TOTAL		100%	100%	100%
Average		7.4	7.5	7.5
n =		1,808	1,634	1,397
Level of crowding on trails	1 - Extremely Dissatisfied	1%	2%	2%
	2	1%	2%	1%
	3	2%	3%	4%
	4	4%	3%	3%
	5	9%	6%	8%
	6	12%	11%	10%
	7	14%	11%	14%
	8	17%	16%	16%
	9	17%	17%	15%
	10 - Extremely Satisfied	23%	29%	27%
TOTAL		100%	100%	100%
Average		7.6	7.7	7.6
n =		1,809	1,619	1,396

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Ski Area Satisfaction Ratings (1 to 10 scale)		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Quality of grooming	1 - Extremely Dissatisfied	0%	1%	1%
	2	0%	1%	0%
	3	1%	1%	1%
	4	2%	3%	2%
	5	6%	5%	6%
	6	12%	10%	9%
	7	15%	13%	13%
	8	20%	19%	20%
	9	18%	19%	19%
	10 - Extremely Satisfied	25%	29%	28%
TOTAL		100%	100%	100%
Average		7.9	8.0	8.1
n =		1,791	1,600	1,382
Overall value for price paid	1 - Extremely Dissatisfied	0%	1%	1%
	2	0%	1%	1%
	3	1%	2%	1%
	4	2%	3%	2%
	5	5%	5%	7%
	6	11%	8%	9%
	7	17%	12%	13%
	8	20%	20%	20%
	9	20%	19%	18%
	10 - Extremely Satisfied	24%	30%	27%
TOTAL		100%	100%	100%
Average		8.0	8.0	7.9
n =		1,818	1,603	1,385

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Ski Area Satisfaction Ratings (1 to 10 scale)		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
(IF RENTING) Overall rental experience	1 - Extremely Dissatisfied	0%	0%	1%
	2	0%	1%	2%
	3	1%	1%	1%
	4	1%	2%	1%
	5	5%	4%	5%
	6	8%	7%	7%
	7	14%	9%	10%
	8	18%	19%	20%
	9	22%	23%	22%
	10 - Extremely Satisfied	30%	34%	29%
TOTAL		100%	100%	100%
Average		8.2	8.3	8.1
n =		1,254	1,184	1,000
(IF TAKING LESSONS) Overall lesson experience	1 - Extremely Dissatisfied	1%	2%	1%
	2	1%	0%	1%
	3	1%	1%	1%
	4	2%	2%	2%
	5	3%	3%	5%
	6	5%	3%	4%
	7	9%	5%	8%
	8	13%	14%	15%
	9	21%	22%	18%
	10 - Extremely Satisfied	45%	48%	46%
TOTAL		100%	100%	100%
Average		8.6	8.7	8.5
n =		735	632	467

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Ski Area Satisfaction Ratings (1 to 10 scale)		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
Overall skiing/snowboarding experience	1 - Extremely Dissatisfied	0%	1%	0%
	2	0%	0%	0%
	3	0%	1%	1%
	4	1%	2%	1%
	5	3%	3%	3%
	6	10%	7%	5%
	7	14%	11%	10%
	8	21%	21%	21%
	9	24%	23%	25%
	10 - Extremely Satisfied	27%	32%	33%
TOTAL		100%	100%	100%
Average		8.3	8.3	8.5
n =		1,801	1,619	1,400
How likely are you to return to this ski area next season?	1 - Not at all likely	1%	2%	1%
	2	0%	1%	1%
	3	0%	1%	1%
	4	0%	2%	1%
	5	3%	3%	3%
	6	6%	5%	4%
	7	12%	8%	6%
	8	16%	17%	13%
	9	19%	13%	14%
	10 - Extremely likely	42%	48%	56%
TOTAL		100%	100%	100%
Average		8.6	8.5	8.8
n =		1,904	1,655	1,438

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Ski Area Satisfaction Ratings (1 to 10 scale)		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
How likely are you to recommend this ski area to a friend, family member, or colleague?	1 - Not at all likely	0%	1%	1%
	2	0%	1%	0%
	3	0%	1%	1%
	4	1%	1%	1%
	5	2%	4%	3%
	6	5%	5%	3%
	7	11%	9%	7%
	8	18%	19%	14%
	9	20%	14%	15%
	10 - Extremely likely	42%	45%	54%
TOTAL		100%	100%	100%
Average		8.7	8.6	8.9
n =		1,910	1,678	1,450
Net Promoter Category	Promoters (% 9-10)	62%	60%	70%
	Passives (% 7-8)	29%	28%	21%
	Detractors (% 1-6)	9%	12%	9%
TOTAL		100%	100%	100%
Net Promoter Score		53.2%	47.2%	60.7%
n =		1,910	1,678	1,450

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Demographics		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
With which gender do you identify?	Male	50%	55%	54%
	Female	49%	45%	46%
	Other gender identity	0%		
TOTAL		100%	100%	100%
	n =	1,926	1,687	1,481
Age of respondent	Under 18	3%	5%	13%
	18 - 24	14%	21%	21%
	25 - 34	27%	19%	20%
	35 - 44	28%	24%	23%
	45 - 54	20%	20%	18%
	55 - 64	7%	7%	4%
	65 - 74	2%	3%	1%
	75 or older	0%	1%	0%
TOTAL		100%	100%	100%
Average		37.4	37.0	32.6
Median		37.0	38.0	32.0
n =		1,915	1,738	1,469
What best describes your marital/family status?	Household with children at home	46%	50%	47%
	Single, no children	25%	25%	26%
	Couple, no children	19%	12%	10%
	17 years or younger	4%	6%	12%
	Household with children no longer at home ("empty-nester")	6%	8%	5%
TOTAL		100%	100%	100%
	n =	1,925	1,709	1,469

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Demographics		Season	
		Winter 2019/20	Winter 2014/15
Annual Household Income (before taxes)	Under \$25,000	11%	15%
	\$25,000 - \$49,999	14%	14%
	\$50,000 - \$99,999	27%	24%
	\$100,000 - \$149,999	21%	20%
	\$150,000 - \$199,999	14%	11%
	\$200,000 - \$249,999	7%	5%
	\$250,000 - \$499,999	5%	8%
	\$500,000 or above	2%	3%
TOTAL		100%	100%
	n =	1,662	1,380
Race/Ethnicity (multiple responses permitted)	White	83%	85%
	Black or African American	9%	3%
	Hispanic/Latino	6%	4%
	Asian or Pacific Islander	5%	6%
	Other	1%	2%
	American Indian or Alaska Native	1%	1%
TOTAL		104%	100%
	n =	1,877	1,701

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Primary Residence		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
U.S. CENSUS DIVISION	South Atlantic (DE, DC, FL, GA, MD, NC, SC, VA, WV)	89.2%	88.3%	87.2%
	East South Central (AL, KY, MS, TN)	8.1%	8.8%	11.0%
	West South Central (AR, LA, OK, TX)	0.6%	1.1%	0.8%
	Middle Atlantic (NJ, NY, PA)	0.5%	0.5%	0.4%
	Pacific (CA, OR, WA, AK, HI)	0.2%	0.3%	0.3%
	Mountain (AZ, CO, ID, MT, NV, NM, UT, WY)	0.2%	0.3%	0.1%
	East North Central (IL, IN, MI, OH, WI)	0.3%	0.1%	0.2%
	New England (CT, ME, MA, NH, RI, VT)	0.4%	0.1%	0.0%
	West North Central (IA, KS, MN, MO, NE, ND, SD)	0.3%	0.1%	
	International	0.2%		
	US territories & overseas armed forces	0.1%	0.1%	
TOTAL		100.0%	100.0%	100.0%
	n =	1,751	1,656	1,436

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

<i>Primary Residence</i>		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
STATE / COUNTRY	North Carolina	56.0%	42.4%	52.4%
	Georgia	12.0%	16.4%	14.2%
	Florida	9.7%	15.1%	10.0%
	South Carolina	10.1%	13.6%	9.6%
	Tennessee	6.2%	5.9%	7.6%
	Alabama	1.7%	2.2%	2.6%
	Virginia	0.9%	0.5%	0.7%
	Texas	0.5%	0.7%	0.3%
	Mississippi	0.0%	0.7%	0.5%
	Louisiana	0.2%	0.3%	0.5%
	Pennsylvania	0.1%	0.2%	0.3%
	Maryland	0.2%	0.2%	0.2%
	California	0.1%	0.2%	0.3%
	Kentucky	0.2%		0.4%
	New York	0.3%	0.1%	0.1%
	West Virginia	0.2%	0.1%	
	Colorado	0.2%	0.1%	0.1%
	Illinois	0.2%	0.1%	
	New Jersey	0.1%	0.2%	0.0%
	Massachusetts	0.1%	0.1%	
	Nebraska	0.1%	0.1%	
	District of Columbia	0.1%	0.1%	0.0%
	Missouri	0.1%		
	Utah	0.1%	0.1%	
	Connecticut	0.1%		0.0%
	Ohio	0.1%		0.1%
Minnesota	0.0%	0.1%		
Indiana	0.0%		0.1%	
Vermont	0.1%			

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North Carolina Ski Areas Survey 19/20

(cont.)

Primary Residence		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
	Hawaii		0.1%	
	New Mexico		0.1%	
	Puerto Rico		0.1%	
	Rhode Island		0.1%	
	Armed Forces Americas	0.1%		
	Germany	0.1%		
	Japan	0.1%		
	Washington	0.1%		
	Australia	0.1%		
	Delaware	0.1%		
	Colombia	0.0%		
	Nevada		0.1%	
	Wisconsin			0.0%
	Arizona		0.0%	
	Arkansas		0.0%	
	Oregon		0.0%	
TOTAL		100.0%	100.0%	100.0%
	n =	1,751	1,656	1,436

26 May 20
Source: RRC Associates

North Carolina Ski Areas Survey 19/20

Primary Residence		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
	Charlotte -- NC, SC	27.4%	22.1%	26.4%
	Greenville - Spartansburg - Asheville - Anderson -- GA, NC, SC	18.7%	10.9%	9.4%
	Atlanta -- AL, GA, NC	9.0%	13.0%	12.3%
	Raleigh - Durham (Fayetteville) -- NC, VA	7.5%	9.1%	10.2%
	Greensboro - High Point - Winston-Salem -- NC, VA	4.9%	5.0%	7.6%
	Orlando - Daytona Beach - Melbourne -- FL	2.6%	3.5%	1.9%
	Tri-Cities -- KY, TN, VA	2.6%	2.3%	3.1%
	Columbia -- SC	1.8%	2.9%	2.3%
	Tampa - Saint Petersburg (Sarasota) -- FL	1.4%	2.0%	3.6%
	Knoxville -- KY, TN	2.1%	2.2%	2.3%
	Miami - Fort Lauderdale -- FL	1.7%	3.5%	1.3%
	Jacksonville, Brunswick -- FL, GA	2.1%	2.5%	1.6%
	Charleston -- SC	2.1%	2.8%	1.0%
	Wilmington -- NC	0.7%	1.1%	2.4%
	Nashville -- KY, TN	1.0%	1.0%	1.3%
	Birmingham (Anniston and Tuscaloosa) -- AL	1.2%	0.7%	1.2%
	Augusta -- GA, SC	1.3%	0.8%	0.9%
	Chattanooga -- GA, NC, TN	0.7%	0.8%	1.3%
	Savannah -- GA, SC	1.2%	0.8%	0.8%
	Greenville - New Bern - Washington -- NC	1.0%	0.8%	0.9%
	Florence - Myrtle Beach -- NC, SC	1.0%	0.7%	0.9%
	West Palm Beach - Fort Pierce -- FL	0.6%	1.2%	0.7%
	Macon -- GA	0.5%	1.1%	0.1%
	Tallahassee - Thomasville -- FL, GA	0.5%	0.8%	0.3%
	Huntsville - Decatur (Florence) -- AL, TN	0.1%	1.0%	0.3%
	Gainesville -- FL	0.3%	0.7%	0.3%
	Montgomery (Selma) -- AL	0.2%	0.4%	0.7%
	Fort Myers - Naples -- FL	0.7%	0.4%	0.1%
	Mobile - Pensacola (Fort Walton Beach) -- AL, FL, MS	0.1%	0.7%	0.4%
	Norfolk - Portsmouth - Newport News -- NC, VA	0.5%	0.3%	0.2%
	Albany -- GA	0.1%	0.3%	0.3%
	Columbus -- AL, GA	0.2%	0.1%	0.4%
	Memphis -- AR, MS, MO, TN	0.1%	0.3%	0.3%
	Washington (Hagerstown) -- DC, MD, PA, VA, WV	0.2%	0.2%	0.3%
	New York -- CT, NJ, NY, PA	0.3%	0.3%	

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North Carolina Ski Areas Survey 19/20

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Primary Residence		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
DESIGNATED MARKET AREA	Panama City -- FL	0.1%	0.5%	
	New Orleans -- LA, MS	0.1%	0.1%	0.3%
	Jackson -- MS	0.0%	0.2%	0.2%
	Dallas - Fort Worth -- TX	0.2%	0.2%	0.0%
	Lexington -- KY	0.2%		0.2%
	Houston -- TX		0.3%	0.1%
	Denver -- CO, NE, NV, WY	0.2%	0.1%	0.1%
	Wilkes Barre - Scranton -- PA	0.1%		0.3%
	Baton Rouge -- LA, MS	0.1%	0.2%	0.1%
	Baltimore -- MD	0.1%	0.2%	0.1%
	Los Angeles -- CA	0.1%	0.1%	0.1%
	Charleston-Huntington -- KY, OH, WV	0.1%	0.1%	0.1%
	Austin -- TX	0.1%	0.1%	0.1%
	Boston (Manchester) -- MA, NH, VT	0.1%	0.1%	
	International	0.2%		
	San Antonio -- TX	0.1%		0.1%
	Columbus - Tupelo - West Point -- AL, MS		0.2%	0.0%
	Roanoke - Lynchburg -- VA, WV	0.2%	0.0%	0.0%
	Richmond - Petersburg -- VA	0.2%		
	Jackson -- TN	0.1%		0.1%
	Paducah - Cape Girardeau - Harrisburg - Mt Vernon -- IL, KY, MO, TN	0.1%		0.1%
	Meridian -- AL, MS		0.1%	0.1%
	Philadelphia -- DE, NJ, PA	0.1%	0.1%	0.0%
	Bluefield - Beckley - Oak Hill -- VA, WV	0.1%		
	Salt Lake City -- ID, NV, UT, WY	0.1%	0.1%	
	San Francisco - Oakland - San Jose -- CA			0.2%
	Lincoln & Hastings - Kearney -- KS, NE	0.1%	0.1%	
	El Paso -- NM, TX	0.1%	0.1%	
	US territories & overseas armed forces	0.1%	0.1%	
	Albany - Schenectady - Troy -- MA, NY, VT	0.0%		0.1%
	Lafayette -- LA	0.0%		0.1%
	Burlington - Plattsburgh -- NH, NY, VT	0.1%		
	Chicago -- IL, IN	0.1%		
Charlottesville -- VA		0.0%	0.1%	
Pittsburgh -- MD, PA, WV		0.1%		

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North Carolina Ski Areas Survey 19/20

(cont.)

Primary Residence		Season		
		Winter 2019/20	Winter 2014/15	Winter 2009/10
	Hartford & New Haven -- CT	0.1%		0.0%
	Beaumont - Port Arthur -- TX		0.1%	
	Mankato -- IA, MN		0.1%	
	Honolulu -- HI		0.1%	
	Santa Barbara - Santa Maria - San Luis Obispo -- CA		0.1%	
	Indianapolis -- IN			0.1%
	Hattiesburg - Laurel -- MS			0.1%
	Providence - New Bedford -- MA, RI		0.1%	
	Saint Louis -- IL, MO		0.1%	
	Quincy - Hannibal - Keokuk -- IL, IA, MO		0.1%	
	Albuquerque - Santa Fe -- CO, NM		0.1%	
	Cleveland -- OH	0.1%		
	Columbia - Jefferson City -- MO	0.1%		
	Seattle - Tacoma -- WA	0.1%		
	Salisbury -- DE, MD	0.1%		
	Rockford -- IL	0.1%		
	Harrisonburg -- VA, WV	0.0%		
	Lafayette -- IN	0.0%		
	Minneapolis - Saint Paul -- MN, WI	0.0%		
	Odessa - Midland -- TX	0.0%		
	Las Vegas -- NV		0.1%	
	Dothan -- AL, GA			0.0%
	Green Bay - Appleton -- MI, WI			0.0%
	Monterey - Salinas -- CA			0.0%
	Phoenix -- AZ		0.0%	
	Portland -- OR, WA		0.0%	
TOTAL		100.0%	100.0%	100.0%
	n =	1,751	1,656	1,436

26 May 20
Source: RRC Associates