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2009-'10 Ski Season

Economic Impact and Skier Characteristics: Montana



Dr. Norma Nickerson and Kara Grau, M.S.

Institute for Tourism and Recreation Research

The University of Montana

Research Report 2010-3

June 2010



Special thanks:

A study like this cannot come to fruition without the incredible work and dedication of many people. First, a special thanks to the seven ski resorts in Montana who allowed surveyors on the slopes and in the buildings to talk to skiers.

- Big Sky Ski Resort
- Bridger Bowl
- Discovery Basin
- Moonlight Basin
- Red Lodge Mountain
- Showdown Montana
- Whitefish Mountain

To all our ski surveyors, this could not have been accomplished without your dedication to the study:

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- Sadie Ondick
- Kristi Funke

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- Megan Tanner
- Laura Lovo

Finally, a special thanks to the 3,419 skiers who took a few moments during their ski day to answer our questions.

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EXECUTIVE SUMMARY

The purpose of this study was to assess the current status of the alpine ski industry in Montana through an analysis of the characteristics of the industry and its economic contribution to the state.

Methods: Surveys were administered December 26, 2009 through April 3, 2010 to skiers at seven ski areas during the 09/10 ski season: Big Sky Ski Resort; Bridger Bowl; Discovery Basin; Moonlight Basin; Red Lodge Mountain; Showdown Montana; and Whitefish Mountain resulting in 3,400 completed surveys (1,620 resident surveys and 1,780 nonresident surveys). Proportion counts of resident to nonresident skiers were administered at the same ski resorts twice a day (Bridger Bowl counts were conducted once a day) on each survey day. Skier visits statewide are 35 percent nonresident and 65 percent resident skiers.

Statewide Summary – Skier Results

	Statewide Resident Skier	Statewide Nonresident skier
Average age:	39.3	41.7
Income:	81% < \$100K 20% > \$100K	47% < \$100K 53% > \$100K
Average nights from home:	0.87 nights	6.66 nights
Skier origin:	75 miles from home	Alb., MN, WA, ND
Avg. days skiing/trip	1.27 days	4.64
Group type	29% friends 26% family	31% family 18% friends
Reason for choosing particular ski resort	70% location 48% terrain	58% location 40% reputation
Information sources:	41% ski area website 23% word of mouth	54% ski area website 45% search engine
Expenditures/group/trip	\$140.96	\$1,272.72

Comparative Ski area summary – Skier Results

	Big Sky	Bridger	Discovery	Moonli	R Lodge	Showd	whitefis
Average age							
Resident	34.7	38.7	41.8	34.6	43.4	40.8	40.6
Nonres.	40.5	43.9	40.1	39.3	44.3	36.1	43.9
Nights away							
Resident	1.47	0.64	0.74	0.71	0.81	1.30	1.39
Nonres.	7.68	6.57	4.46	6.69	4.95	7.08	6.21
Days skiing							
Resident	1.40	1.09	1.20	1.20	1.14	1.40	1.80
Nonres.	5.44	5.77	3.61	3.95	3.73	3.24	4.11
Group type							
Resident	Friends	Friends	Family	Friends	Family	Family	Family
Nonres.	Family	Family	Friends	Family	Family	Friends	Family
Resort choice							
Resident	Terrain	Location	Location	Price	Location	Location	Location
Nonres.	Terrain	Location	Location	Price	Location	Location	Location
\$/grp./trip							
Resident	\$192	\$111	\$85	\$141	\$137	\$146	\$188
Nonres.	\$1,496	\$1,333	\$272	\$1,358	\$735	\$620	\$1,267

Table 2.3: Economic Impact of the Ski Industry in Montana*

Impacts	Direct	Indirect	Induced	Combined
Industry Output	\$49,464,000	\$18,602,000	\$15,270,000	\$83,336,000
Employment (# of jobs)	716	158	144	1,018
Employee Income	\$15,035,000	\$5,760,000	\$4,683,000	\$25,478,000
Proprietor Income	\$2,192,000	\$1,237,000	\$789,000	\$4,218,000
Other Property Type Income	\$7,033,000	\$3,375,000	\$3,191,000	\$13,599,000

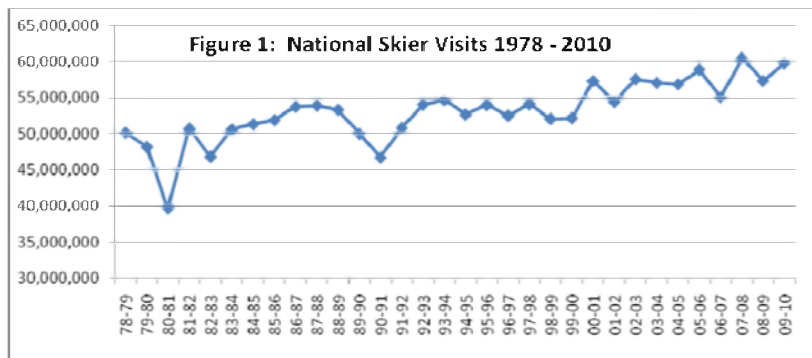
INTRODUCTION

This report is intended to provide a profile of the alpine ski industry in Montana. The Montana Tourism Advisory Council along with the Montana Ski Area Association cooperated in approving and funding this study of Montana ski areas for the 2009-2010 ski season.

Ski Industry

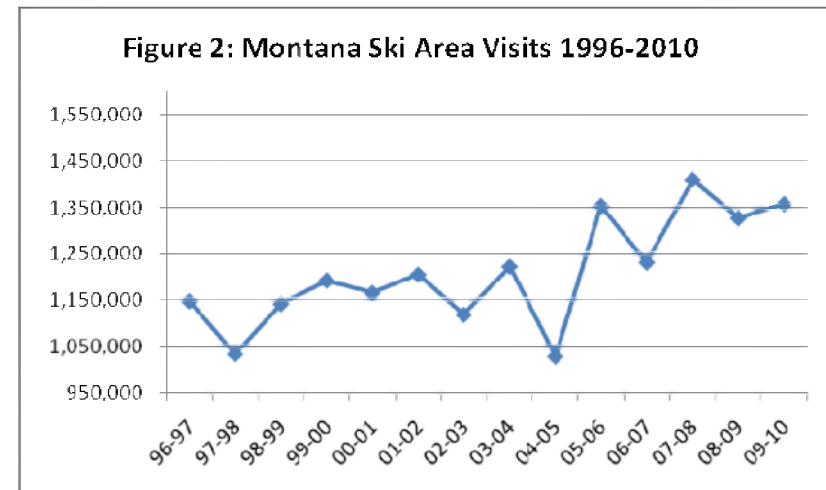
The 2009-10 ski season in the United States proved to be the second best season ever with an overall increase of 4.2 percent, only 1.2 percent below the all time record of 60.5 million visits recorded in 2007/08 (NSAA, 2010, <http://www.nsaa.org/nsaa/press/industryStats.asp>), (Fig. 1). The Rocky Mountain region continued its dominant overall position in terms of total visitation, increasing by 3.4 percent over last year, and again exceeding the 20 million visit threshold.

Figure 1: National Skier Visits



In Montana, despite the economy and dramatic differences in snowfall levels by resort, the skier numbers increased by 2.3 percent in the 09/10 season over 08/09. The 1,357,249 skier visits was the second highest season on record, just 4 percent less than the 07/08 record year. Bridger Bowl reported its best ski season ever in 09/10 while Teton Pass did not even open this season.

Figure 2: Montana Skier Visits



Study Purpose

The purpose of this study was to assess the current status of the alpine ski industry in Montana through an analysis of the characteristics of the industry and its economic contribution to the

state. To address this purpose, the following objectives were developed:

Objectives:

- To identify demographics and alpine skier trip characteristics at Montana ski areas.
- To estimate in-state and nonresident ski trip expenditures.
- To estimate the economic impact of the Montana alpine ski industry on Montana’s economy.

METHODOLOGY

Figure 3



1) Bear Paw Ski Bowl; 2) Big Sky Resort; 3) Blacktail Mountain; 4) Bridger Bowl; 5) Discovery Basin; 6) Great Divide; 7) Lookout; 8) Lost Trail; 9) Maverick Mountain; 10) Montana Snowbowl; 11) Moonlight Basin; 12) Red Lodge Mountain; 13) Showdown Montana; 14) Turner Mountain, and; 15) Whitefish Mountain. (map accessed from www.visitmt.com)

There are 16 active ski resorts in Montana (Fig. 3). In consultation with the Montana Ski Area Association (MSAA), seven resorts were used in the data collection process based on three category types: large destination resorts, medium size resorts, and small, local resorts. Big Sky Resort, Moonlight Basin, and Whitefish Mountain represented the large destination resorts. Bridger Bowl and Red Lodge Mountain represented the medium size resorts, and Discovery and Showdown represented the small, local resorts.

Survey Design

Researchers at the Institute for Tourism and Recreation Research (ITRR) along with members of the MSAA met during the September 2009 MSAA meeting to determine the type and approximate number of questions for the survey. ITRR refined the questions into the final survey (Appendix A). The survey was designed to fit on one 8x10-inch paper (front and back) for ease of administration.

Seven demographic questions and 31 trip characteristic questions were asked on the survey. The survey was designed to gather information about both resident and nonresident skier characteristics and expenditures, allowing for an assessment of the economic impact of skiing to Montana.

In order to assess the economic impact, proportion counts of resident to nonresident skiers were assessed twice each sampling day at the seven participating resorts.

Sampling

Sampling at the seven participating ski areas began during the winter holiday (Christmas) break, December 26th or 27th, 2009.

Sampling was completed during the Easter weekend of April 3rd-4th for 17 sample periods for each resort. Whitefish Mountain paid to have an additional 14 days sampled. Each week of sampling alternated between a weekend day or a weekday to represent all visitor types at the ski areas.

Data Collection

Six surveyors were hired for the winter ski season (one surveyor covered both Big Sky and Moonlight) to conduct on-site interviews. Surveyors were located in the lodges or immediately outside the lodge, usually in eating areas. This was found to be the most efficient location since skiers were sitting down, relaxed, and not in a hurry. The surveyor was instructed to vary the intercept person by gender and age as much as possible but no systematic intercept was required. The surveyor would identify herself as conducting research with the University of Montana in conjunction with the ski resort to assess the economic impact of skiing to Montana. The survey lasted approximately five minutes. Each surveyor was asked to get 30 surveys completed each day if possible.

Response Rate, Sample Size, and Weighting

Surveyors were to record the number of refusals to participate each day; however, because the numbers were so low, surveyors stopped keeping track of refusals. In most cases there were zero refusals in a day. The most recorded on one day was three. Because of the high response rate, it is believed that the completed surveys represent all skiers in Montana.

Sample size varied amongst resorts with a low of 290 at Red Lodge to a high of 944 at Whitefish (Table 1). These different sizes reflect some missed days at Red Lodge and extra sampling at Whitefish.

Table 1: Survey Sample Size

Ski Area	Resident Sample	Nonresident Sample	Total Sample/resort
Big Sky	149	326	475
Bridger Bowl	315	145	460
Discovery	317	33	350
Moonlight	222	236	458
Red Lodge	155	135	290
Showdown	342	62	404
Whitefish	119	825	944
TOTAL	1,620	1,780	3,400

To enable the skier sample data to represent the full skier numbers, the sample was weighted. For example, ski numbers at Whitefish represent 26 percent of all skiers in the state, but our sample size represented 28 percent. This required that a weight be applied to the sample size so it was effectively ‘reduced’ by two percent. Weighting provides accurate representation of visitor characteristics and spending for the state and does not skew information simply based on where skiers were intercepted.

Proportion of Resident to Nonresident Skiers

Generalizing to the full population of skiers based on the sample data required the Institute for Tourism and Recreation Research to conduct proportion counts of resident vs. nonresident skiers at each of the participating resorts.

Therefore, in addition to the on-site interviews, surveyors conducted proportion counts at selected chairlifts on each mountain (except at Bridger Bowl where the proportions were

conducted each morning as skiers funneled past them from the parking lot towards the chair lifts). Two times each sampling day, the surveyor asked every person getting on the chair (or going past them at Bridger), if they were a resident of Montana or not and recorded the answers on a sheet of paper. The proportion count time did not exceed the amount of time it would take one skier to get on the lift and ski back down to the bottom. Lift speed and ski conditions determined the count time, but the average was 20 minutes.

The number of nonresident and resident skiers counted in the proportion counts varied by ski resort. Big Sky Ski Resort was the only resort with more nonresident skiers than resident skiers. Moonlight Basin and Whitefish were nearly identical in their proportions. Red Lodge and Bridger followed with about 1/3 of their skier days as out-of state skiers. Ski areas not included in the survey sampling (Blacktail, Lookout, Lost Trail, Maverick, Snowbowl, Turner, and Great Divide) were assigned the average of Showdown and Discovery proportion counts.

Table 2: Proportion of Resident to Nonresident Skiers

Participating Ski Area	Resident proportion	Nonres. proportion
Big Sky	42.3%	57.7%
Bridger	72.2%	27.8%
Discovery	93.5%	6.5%
Moonlight	54.7%	45.3%
Red Lodge	62.0%	38.0%
Showdown	92.8%	7.2%
Whitefish	54.0%	46.0%
Blacktail, Lookout, Lost Trail, Maverick, Snowbowl, Turner, and Great Divide	93.2%	6.8%
Statewide Proportion	65%	35%

FINDINGS

The results of the study are reported in three sections.

- Section 1: Statewide resident and nonresident skier characteristics.
- Section 2: Statewide spending and economic impact.
- Section 3: Resident and nonresident skier characteristics by each of the seven participating ski areas.

SECTION 1: STATEWIDE RESULTS

The findings of the study begin with a description of the skier demographics; trip characteristics; skier characteristics; choice of resort and information sources; and, finally, expenditures for all skiers. These categories are presented for both resident and nonresident skiers. The weighted sample for this study represents 1,446 residents and 1,963 nonresidents.

Statewide Skier Demographics

Resident respondents were 56 percent male and 44 percent female while the nonresidents were 58 percent male and 42 percent female. The average age of respondents in this study was 39.3 for resident skiers and 41.7 for nonresident skiers.

The range of ages within the skier group varied slightly between resident and nonresident skiers (Table 1.1). The thirty-five to forty-four age range had the highest representation for both residents and nonresidents.

Table 1.1: Percent of Skier Groups with Various Ages

Age Groups	Resident (n=1,430)	Nonresident (n=1,942)
0-5 years old	7%	9%
6-10 years old	20%	18%
11-17 years old	21%	24%
18-24 years old	20%	24%
25-34 years old	27%	23%
35-44 years old	34%	33%
45-54 years old	23%	31%
55-64 years old	13%	17%
65-74 years old	5%	7%
75 and over	1%	1%

Household income levels between resident and nonresident skiers varied significantly. Not surprisingly, residents have a much lower household income than nonresidents (Table 1.2). While 31 percent of nonresidents had household incomes over \$150,000, only eight percent of resident skiers fell into that income category.

Table 1.2: Household Income

Household Income	Resident* (n=1,353)	Nonresident* (n=1,890)
<\$25,000	18%	12%
\$25,000 to \$49,999	17%	8%
\$50,000-\$74,999	24%	9%
\$75,000-\$99,999	22%	18%
\$100,000-\$149,999	12%	23%
\$150,000- \$199,999	4%	20%
\$200,000+	4%	11%

*Numbers may not add to 100% due to rounding.

Statewide Skier Trip Characteristics

Resident: Sixty-four percent of resident skiers did not spend a night away from home while 14 percent spent one night, and 10 percent spent two nights away from home (Table 1.3). The average number of nights away from home was 0.87.

Nonresident: On average, nonresidents spent 6.66 nights in Montana on this ski trip. Three to seven nights were the most common for nonresidents.

Table 1.3: Nights from Home

Nights away from home *	Resident** (n=847)	Nonresident** (n=1,833)
0	64%	5%
1	17%	1%
2	10%	6%
3	6%	10%
4	3%	15%
5	3%	15%
6	--	13%
7	--	16%
8	--	5%
9	--	1%
10 + nights	--	9%

*delimited to 30 nights

*Numbers may not add to 100% due to rounding.

Resident: Residents who spent a night were more likely to spend a night in a motel (40%) followed by the home of a friend or relative (Table 1.4).

Nonresident: Nonresident skiers were more likely to stay overnight either in a hotel or rental cabin/condo (28% each) followed by 26 percent who stayed in the home of a friend or relative (Table 1.4).

Table 1.4: Types of Accommodations (of those who spent a night)

Accommodation Type	Resident (n=286)	Nonresident (n=1,755)
Hotel/Motel	40%	28%
My condo	9%	9%
My 2 nd home	6%	8%
Rental home/cabin/condo	9%	28%
B&B	<1%	1%
Home of friend/relative	35%	26%
Lodge	4%	8%

*Numbers may not add to 100% due to rounding.

Resident: On average residents drove 75 miles from home, but ranged from 0 to 550 miles from home (Table 1.5).

Table 1.5: Resident Miles from Home

Miles	% of skiers (n=1,396)
10 Miles or less	11%
11-25 miles	21%
26-50 miles	21%
51-75 miles	17%
76-100 miles	9%
101-150 miles	9%
Over 150 miles	12%

*Numbers may not add to 100% due to rounding.

Nonresident: More nonresident skiers came from Alberta and Minnesota than any other states or provinces followed by Washington and North Dakota (Table 1.6). Nonresidents represented all U.S. states (plus D.C.), seven Canadian provinces and 17 other foreign countries (11 from Australia, eight from England/UK, four from New Zealand, three from Germany and one or two from Netherlands, Argentina, Brazil, China, Chile, Denmark, France, Ireland, Japan, Norway, Singapore, Switzerland, and Ukraine).

Table 1.6: Nonresident Place of Residence

From:	% of skier groups (n=1,948)
Alberta	11%
Minnesota	10%
Washington	7%
North Dakota	6%
CA, FL	4%
WI, WY, GA, TX, SASK,	3%
ID, IL, MI, OH, OR, PA, VA,	2%

Statewide Skier Characteristics

Sixty-four percent of resident groups skiing in Montana had at least one person in their group with a season pass. Twenty percent of the nonresident skier groups skiing in Montana had at least one person in their group with a season pass.

Resident: The average days skiing/boarding in Montana on this trip was 1.27 however, most residents were skiing only one day on their trip (Table 1.7).

Nonresident: While the average number of nights in Montana was 6.66, the average number of days skiing/boarding was 4.64. This means nonresidents either did other activities while on their ski vacation in Montana or spent the remaining days driving in Montana to and from the ski area (Table 1.7).

Table 1.7: Number of days Skiing/boarding on this trip

Days	Resident (n=1,400)	Nonresident (n=1,915)
1	84%	15%
2	11%	19%
3	3%	20%
4	<1%	16%
5	1%	17%
6	<1%	6%
7 +	<1%	6%

*Numbers may not add to 100% due to rounding.

Nonresident: When asked about the purposes for their trip to Montana, 92 percent said to ski/board along with vacation (73%) and visiting friends and relatives (33%). The primary purpose, however, showed that 65 percent came mainly to ski/board in Montana (Table 1.8).

Table 1.8: Nonresident purpose of Trip

(n=1,819)	All purposes	Primary Purpose
Ski/Snowboard	92%	65%
Vacation	73%	15%
VFR	33%	15%
Other	5%	4%
Business	2%	1%
Passing Through	1%	<1%

Table 1.8 Cont'd.		
Shopping	6%	<1%

*Numbers may not add to 100% due to rounding.

Nonresident: Nonresidents were slightly more likely to arrive in Montana via air than private auto while seven percent entered the state by train (Table 1.9).

Table 1.9: Nonresident Transportation into MT

Type of Transportation used	% (n=1,803)
Air	48%
Auto/Truck/RV	43%
Train	7%
Bus	2%

*Numbers may not add to 100% due to rounding.

Nonresident: Further analysis of the nonresident transportation mode by their length of stay and number of days skiing in Montana shows that people who arrive by air spend the most time in the state but the least time skiing (Table 1.10).

Table 1.10: Nonresident Transportation type by Length of Stay

	Auto (n=829)	Plane (n=845)	Train (n=132)
Length of stay	5.71	7.81	5.21
# of ski days	4.46	5.28	3.61
Extra days in MT	1.25	2.53	1.60
% of time in MT skiing	78%	68%	69%

Resident: Average group size for resident skiers was 2.4 people. Resident skiers were more likely to be skiing with friends than any other group type followed by skiing with their immediate family (Table 1.11).

Nonresident: Average group size for nonresident skiers was 2.58 people. Nearly one-third (31%) of all nonresident skiers were traveling with their immediate family compared to the next group type of friends at 18 percent of the groups (Table 1.11).

Table 1.11: Type of Travel Group

Group Type	Resident (n=1,432)	Nonresidents (n=1,938)
Self	13%	8%
Couple	13%	17%
Immediate family	26%	31%
Extended family	4%	7%
Family & friends	11%	15%
Friends	29%	18%
Business Associates	1%	1%
Organized Group/club	3%	3%

*Numbers may not add to 100% due to rounding.

Resident/Nonresident: Respondents were asked if they were skiing or boarding today and to identify their ability level in skiing/boarding. Residents were much more likely to claim advanced abilities than nonresidents and both groups were more likely to be skiing over snowboarding (Table 1.12).

Table 1.12: Activity Type and Ability Level

	Resident (n=1,400)	Nonresident (n=1,924)
Type of Activity		
Skiing	70%	71%
Snowboarding	25%	20%
Both	5%	9%
Ability Level		
Beginner	5%	9%
Intermediate	36%	51%
Advanced	59%	40%

*Numbers may not add to 100% due to rounding.

Statewide Skier Resort Choice and Information Sources

Resident: Not surprisingly, residents chose their particular resort to ski based on location over any other reason, followed by terrain of the area (Table 1.13).

Nonresident: Location was the number one reason for nonresidents to ski at a particular resort for 58 percent of respondents followed by reputation of the resort (40% of respondents) (Table 1.13).

Table 1.13: Why visit this Resort?

	Resident (n=1,414)	Nonresident (n=1,873)
Price	41%	30%
Terrain	48%	37%
Location	70%	58%
Recommendation	16%	37%
Short lift lines	26%	18%

Table 1.13 cont'd.		
Reputation	33%	40%
Own condo/home here	7%	15%
Family friendly	36%	23%

*Numbers may not add to 100% due to rounding.

Resident: Most residents did not use any information sources for their ski trip, but when they did, 41 percent used the ski area home page as their information source (Table 1.14).

Nonresidents: Nonresidents were most likely to use the ski area homepage for their information gathering followed by an internet search engine and word of mouth (Table 1.14). Social networking, such as Facebook, was used by nine percent of nonresidents, while seven percent used videos/You Tube/podcasts for information, and three percent used blogs or wikis. These newer types of information sources are just starting to show up on surveys as forms of information gathering.

Table 1.14: Sources of Information Used

	Resident (n=1,414)	Nonresident (n=1,935)
None	64%	18%
Word of mouth	23%	31%
Internet search engine	11%	45%
Ski area homepage	41%	54%
Social networking	4%	9%
On-line consumer review	1%	6%
Video/You Tube/Podcast	2%	7%
Blogs, wiki	<1%	3%
MT Planner/wntr guide	<1%	7%
Magazine ad/article	1%	3%
Radio ad	4%	<1%
TV ad	2%	<1%

*Numbers may not add to 100% due to rounding.

SECTION 2: STATEWIDE EXPENDITURE PATTERNS AND ECONOMIC IMPACT

Statewide Skier Expenditure Patterns

Resident: Six percent of resident skiers indicated they had purchased some form of ski package. These packages cost between \$10 and \$2,500. Of those who purchased packages, 93% said it included lift tickets; 11% had accommodations included; 6% said spa treatments were included; 8% had food/beverage included; 39% included equipment rental; and 47% indicated that other products or services were included in their package.

Lift tickets were, on average, the most expensive item purchased by residents during their ski trip followed by restaurant, bar and gas purchases. The average resident group expenditure per trip was \$140.96 (Table 2.1). When averaged as a per day expenditure, the group spent \$158.38 per day.

Nonresident: Eight percent of Nonresident skiers purchased some variety of a travel/ski package ranging from \$10 to \$2,500. Of those who purchased packages, 87 percent included lift tickets; 68 percent had accommodations included; 13 percent had car rental; eight percent included airline tickets; six percent included spa treatments; 17 percent had food/beverage included; 25 percent included equipment rental; and 41 percent indicated that other products or services were included in their package.

Nonresidents spent more of their trip expenditure on accommodations than any other expenditure, but this was followed closely by lift tickets. Average group expenditures for nonresidents while in Montana were \$1,272.72 (Table 2.1). When averaged as a per day expenditure, the group spent \$191.09 per day.

Table 2.1 Average Expenditures/ski trip by residents and nonresidents

Expenditure Type	Resident	Nonresident
Accommodations	\$ 12.79	\$ 302.69
Gas	24.28	62.17
Restaurant, bar	28.35	209.44
Groceries	13.18	109.94
Transport fares	0.01	3.74
Auto/RV rental	0.05	59.86
Retail	5.80	93.04
Lift tickets	44.17	303.04
Permits, entrance fees	0.10	1.90
Equipment rental	3.77	48.78
Snowmobile/Snowcoach	0.01	7.21
Guided trip	-	12.61
Lessons	3.93	34.36
Other services	1.53	23.94
Sum	\$ 140.96	\$ 1,272.72

Averages become confusing when some people don't spend money in a category but are included in the total number; therefore, Table 2.2 shows an average expenditure within each category for those people who spent money in that category.

Table 2.2 Expenditures per group/ski trip by those who actually spent money in each category

Expenditure Type	Resident	Nonresident
Accommodations	\$ 180.03	\$ 610.58
Gas	27.17	93.11
Restaurant, bar	34.56	238.31
Groceries	19.74	137.38

Table 2.2 Cont'd.		
Transport fares	6.25	51.73
Auto/RV rental	26.30	269.33
Retail	39.52	159.83
Lift tickets	95.82	382.19
Permits, entrance fees	8.07	17.40
Equipment rental	32.18	137.67
Snowmobile/Snowcoach	-	147.42
Guided trip	-	155.73
Lessons	54.91	182.06
Other services	39.07	108.89

Nonresident Skier Economic Impact to Montana

Skiing as an economic impact to Montana can only be stated from the number of dollars brought into the state by nonresidents. While residents do spend money in the state when skiing, and therefore keep the money within the state, they are simply moving money from one part of the state to another (or not at all if skiing within their own county). Therefore, this portion of the report only applies to the **nonresident** contribution to Montana's economy.

Assessing the nonresident impact to Montana starts with the total number of skiers during the 09/10 ski season, subtracting out the number of resident skiers (based on proportion counts in Table 2), then applying nonresident spending patterns to the economic input/output model IMPLAN.

The \$49 million direct impact level produced through the IMPLAN model reports that 716 jobs are directly involved in skiing with a combined number of 1,018 jobs. *These are jobs supported by nonresident skiers who represent only 35 percent of all skier days in*

the state (Table 2). This economic impact only relates to the ski season.

The impact shown in Table 2.3 is not for an entire year. Ski areas open all year would provide an additional impact to the state not represented here.

Table 2.3: Economic Impact of the Ski Industry in Montana*

Impacts	Direct	Indirect	Induced	Combined
Industry Output	\$49,464,000	\$18,602,000	\$15,270,000	\$83,336,000
Employment (# of jobs)	716	158	144	1,018
Employee Income	\$12,843,000	\$4,524,000	\$3,894,000	\$21,260,000
Proprietor Income	\$2,192,000	\$1,237,000	\$789,000	\$4,218,000
Other Property Type Income	\$7,033,000	\$3,375,000	\$3,191,000	\$13,599,000

***Definitions:** Direct impacts result from nonresident skier purchases of goods and services; Indirect impacts result from purchases made by skier area related business; Induced impacts result from purchases by those employed in the ski industry-related occupations. Industry Output is the value of an industry's total production; Employment is full and part-time annual jobs; Other Property Type Income is income derived from rental property, dividends, and royalties.

SECTION 3: RESULTS BY SKI RESORT

Section 3 of this report provides skier information by participating ski resort in alphabetical order:

- Big Sky Ski Resort
- Bridger Bowl
- Discovery Basin
- Moonlight Basin
- Red Lodge Mountain
- Showdown Montana
- Whitefish Mountain

Each resort has a description of the skier demographics, respondent and group characteristics, trip characteristics, choice of resort and information sources and, finally, expenditures. These categories are presented for both resident and nonresident skiers.

3. Big Sky Ski Resort

The following data for Big Sky is presented for resident and nonresident skiers. The resident sample size for this study at Big Sky was 291, and the nonresident sample size was 326.

Big Sky Demographics

Resident respondents were 52 percent male and 48 percent female while the nonresidents were 53 percent male and 47 percent female. The average age of respondents in this study was 34.7 years for resident skiers and 40.5 years for nonresident skiers.

The range of ages within the skier group varied slightly between resident and nonresident skiers but both groups had the largest percent in the 35-44 year age group (Table 3.1).

Table 3.1: Percent of Skier Groups with Various Ages

Age Groups	Resident (n=291)	Nonresident (n=325)
0-5 years old	5%	7%
6-10 years old	20%	17%
11-17 years old	16%	24%
18-24 years old	26%	26%
25-34 years old	30%	22%
35-44 years old	39%	37%
45-54 years old	15%	26%
55-64 years old	7%	17%
65-74 years old	3%	7%
75 and over	--	1%

Household income levels between resident and nonresident skiers varied significantly. Residents have a much lower household income than nonresidents (Table 3.2).

Table 3.2: Household Income

Household Income	Resident* (n=287)	Nonresident* (n=316)
<\$25,000	27%	18%
\$25,000- \$49,999	17%	7%
\$50,000-\$74,999	18%	5%
\$75,000-\$99,999	25%	15%
\$100,000-\$149,999	10%	25%
\$150,000-\$199,999	2%	21%
\$200,000+	3%	9%

*Numbers may not add to 100% due to rounding.

Big Sky Trip Characteristics

Resident: Sixty-eight percent of Big Sky resident skiers did not spend a night away from home, while 13 percent spent one night and seven percent spent two nights away from home (Table 3.3). Average resident trip length was 1.47 nights.

Nonresident: On average, nonresident Big Sky skiers spent 7.68 nights in Montana on this ski trip (Table 3.3).

Table 3.3: Nights from Home

Nights away from home	Resident* (n=236)	Nonresident* (n=311)
0	68%	9%
1	13%	1%
2	7%	2%
3	4%	6%
4	5%	9%
5	--	14%
6	1%	16%
7	3%	18%
8	--	7%
9	--	<1%
10 + nights	--	11%

*Numbers may not add to 100% due to rounding.

Resident: Residents who spent a night were more likely to spend a night at the home of a friend or relative (39%) followed by a night in a hotel (Table 3.4).

Nonresident: Nonresident skiers were more likely to stay overnight either in a rental cabin/condo (35%) or a hotel (31%) (Table 3.4).

Table 3.4: Types of Accommodations (for those who spent a night)

Accommodation Type	Resident (n=76)	Nonresident (n=277)
Hotel/Motel	28%	31%
My condo	21%	11%
My 2 nd home	--	8%
Rental home/cabin/condo	10%	35%
B&B	--	1%
Home of friend/relative	39%	21%
Lodge	5%	7%

*Numbers may not add to 100% due to rounding.

Resident: On average, residents drove 86 miles from home, but ranged from 0 to 500 miles (Table 3.5).

Table 3.5: Resident Miles from Home

Miles (86 miles average)	% of skiers (n=272)
10 Miles or less	23%
11-25 miles	2%
26-50 miles	31%
51-75 miles	11%
76-100 miles	3%
101-150 miles	15%
Over 150 miles	18%

*Numbers may not add to 100% due to rounding.

Nonresident: More nonresident skiers came from Minnesota than any other state or province followed by California, Florida, and Georgia (Table 3.6). Nonresidents represented 44 U.S. states, two Canadian provinces (Alberta and Ontario) and seven other foreign countries (Australia, England/UK, New Zealand, Argentina, France, Singapore, Switzerland).

Table 3.6: Nonresident Place of Residence

From:	% of skier groups (n=323)
Minnesota	9%
CA, FL, GA,	5%
IL, PA, WA,	4%
AL, CO, ID, MD, MI, ND, OH, TX, VA, WI,	3%
ALB, MA, MS,NJ, NY, NC, SD, TN,	2%

Big Sky Ski Characteristics

Sixty-four percent of resident groups skiing at Big Sky had at least one person with a season pass. Twenty-six percent of the nonresident skier groups at Big Sky had at least one person in their group with a season pass.

Resident: The average number of days skiing/boarding in Montana on this trip was 1.4 days.

Nonresident: While the average number of nights in Montana was 7.68, the average number of days skiing/boarding was 5.44. This means nonresidents, while here to ski, either did other activities while on their ski vacation in Montana or spent the remaining days driving in Montana to and from the ski area (Table 3.7).

Table 3.7: Number of days Skiing/boarding on this trip

Days	Resident	Nonresident (n=308)
1	77%	20%
2	12%	8%
3	8%	13%
4	--	15%
5	2%	27%
6	<1%	7%
7 +	--	7%

*Numbers may not add to 100% due to rounding.

Nonresident: When asked about the purposes for their trip to Montana, 85 percent said to ski/board, vacation (55%) and visit friends and relatives (29%). The primary purpose, however, showed that 58 percent came mainly to ski/board at Big Sky (Table 3.8).

Table 3.8: Nonresident purpose of Trip

(n=276)	All purposes	Primary Purpose
Ski/Snowboard	85%	58%
Vacation	55%	17%
VFR	29%	15%
Other	11%	8%
Business	2%	2%
Passing Through	2%	1%
Shopping	1%	--

*Numbers may not add to 100% due to rounding.

Resident: Average group size for resident skiers was 2.21 people. Residents were more likely to ski with friends than any other group type (Table 3.9).

Nonresident: Average group size for nonresident skiers was 2.6 people and groups were most likely to be immediate family (Table 3.9).

Table 3.9: Type of Travel Group

Group Type	Resident (n=287)	Nonresidents (n=323)
Self	17%	8%
Couple	16%	21%
Immediate family	22%	28%
Extended family	3%	6%
Family & friends	8%	14%
Friends	32%	20%
Business Associates	<1%	2%
Organized Group/club	2%	2%

*Numbers may not add to 100% due to rounding.

Nonresident: Over three quarters of nonresidents intercepted at Big Sky arrived in Montana via air, and 23 percent arrived by private auto (Table 3.10).

Table 3.10: Nonresident Transportation into MT

Type of Transportation used	% (n=275)
Air	77%
Auto/Truck/RV	23%
Train	--
Bus	<1%

Resident/Nonresident: Respondents were asked if they were skiing or boarding the day they were surveyed and to identify their ability level in skiing/boarding. Residents were much more likely to claim advanced abilities than nonresidents and both groups were more

likely to be skiing over snowboarding, although a large percent of residents (40%) were snowboarding (Table 3.11).

Table 3.11: Activity Type and Ability Level

	Resident (n=287)	Nonresident (n=322)
Type of Activity		
Skiing	59%	72%
Snowboarding	40%	25%
Both	2%	3%
Ability Level		
Beginner	<1%	8%
Intermediate	20%	40%
Advanced	79%	52%

*Numbers may not add to 100% due to rounding.

Big Sky Resort Choice and Information Sources

Resident: Resident skiers at Big Sky chose to ski there mostly because of the terrain (66%) followed by location (47%) (Table 3.12).

Nonresident: Terrain was indicated by more nonresidents as the reason to ski Big Sky followed by location, recommendations, and reputation (Table 11).

Table 3.12: Why visit Big Sky?

	Resident (n=273)	Nonresident (n=303)
Price	14%	7%
Terrain	66%	49%
Location	47%	37%
Recommendation	15%	30%
Short lift lines	22%	22%
Reputation	24%	30%
Own condo/home here	10%	18%
Family friendly	16%	17%

*Numbers may not add to 100% due to rounding.

Resident: While 35 percent of resident skiers at Big Sky indicated they would also ski at Bridger Bowl this season, 34 percent indicated they would not ski any other Montana ski areas. Nineteen percent said they would also ski at Moonlight (Table 3.13).

Nonresident: Thirty-nine percent of nonresident skiers at Big Sky would be skiing at Moonlight this season, however, 53 percent did not ski at any other resort in Montana this season (Table 3.13).

Table 3.13: Other MT Ski Areas Visited this Ski Season

Other MT Ski Areas	% Resident Visiting Other Ski Resorts (n=289)	% Nonresident Visiting Other Ski Resorts (n=324)
Bear Paw Ski Bowl	0	0
Big Sky Resort	--	---
Blacktail Mountain	2%	0
Bridger Bowl	35%	10%
Discovery Basin	9%	1%
Great Divide	7%	<1%

Table 3.13 Cont'd.	Resident	Nonresident
Lookout	<1%	0
Lost Trail	5%	2%
Maverick Mountain	1%	0
Montana Snowbowl	5%	1%
Moonlight Basin	19%	39%
Red Lodge Mountain	5%	2%
Showdown Montana	1%	<1%
Turner Mountain	1%	0
Whitefish Mountain	5%	2%
Will not ski other MT ski areas	34%	53%

*Numbers may not add to 100% due to rounding.

Resident: Most residents did not use any information source for their ski trip, but when they did, 31 percent indicated “word of mouth” was the source used most often (Table 3.14).

Nonresidents: Nonresident were most likely to use the ski area homepage, word of mouth, and the Internet search engine for their information sources (Table 3.14). Social networking, such as Facebook, was used by 18 percent of nonresidents, while 11 percent used on-line consumer reviews and seven percent used videos/You Tube/podcasts for information. Big Sky and Moonlight were the only two resorts where social networking and reviews were used by a significant number of skiers.

Table 3.14: Sources of Information Used

	Resident (n=283)	Nonresident (n=324)
None	44%	23%
Word of mouth	31%	36%
Internet search engine	9%	35%
Ski area homepage	15%	38%
Social networking	8%	18%
On-line consumer review	2%	11%
Video/You Tube/Podcast	4%	7%
Blogs, wiki	--	4%
MT Planner/wtr guide	--	9%
Magazine ad/article	--	4%
Radio ad	--	<1%
TV ad	<1%	--

Big Sky Expenditure Patterns

Resident: Four percent of resident skiers at Big Sky purchased some form of a ski package ranging from \$100 to \$500. These ski packages included equipment rental, some food/beverage, and other services or products.

Nonresident: Twelve percent of Big Sky visitors purchased some variety of a travel/ski package ranging from \$70 to \$4,800. Of those who purchased packages, 85 percent included lift tickets; 62 percent had accommodations included; eight percent had car rental; two percent included airline tickets; eight percent included spa treatments; 18 percent had food/beverage included; 31 percent included equipment rental; and 56 percent indicated that other products/services were included in their package.

Resident: Residents skiing at Big Sky spent more money on lift tickets than in any other category. This was followed by restaurant and bar expenditures (Table 3.15). Residents skiing at Big Sky during the 09/10 ski season spent \$7.4 million for their ski trip experience.

Nonresident: Nonresidents spent more of their trip expenditure on accommodations than any other expenditure, but this was followed closely by lift tickets (Table 3.15). Average group expenditures for nonresidents while in Montana were \$1,495.78. Nonresidents skiing at Big Sky during the 09/10 ski season contributed \$19.7 million to the Montana economy.

Table 3.15: Average Expenditures/ski trip by residents and nonresidents

Expenditure Type	Resident	Nonresident
Accommodations	\$ 26.77	\$381.71
Gas	18.87	48.25
Restaurant, bar	28.81	206.14
Groceries	23.15	119.08
Transport fares	--	7.64
Auto/RV rental	0.33	77.85
Retail	0.63	58.42
Lift tickets	86.69	399.90
Permits, entrance fees	--	0.24
Equipment rental	1.08	68.42
Snowmobile/Snowcoach	--	8.94
Guided trip	--	25.77
Lessons	2.75	53.67
Other services	3.14	39.75
Avg. \$/group/trip	\$192.22	\$1,495.78

Table 3.16 shows an average expenditure within each category for those people who spent money in that category. This provides a more realistic look at actual costs to the consumer.

Table 3.16: Expenditures per group/ski trip by those who actually spent money in each category

Expenditure Type	Resident	Nonresident
Accommodations	\$215.64	810.21
Gas	44.13	87.70
Restaurant, bar	44.43	237.96
Groceries	35.70	144.03
Transport fares	--	89.78
Auto/RV rental	23.56	272.49
Retail	11.46	149.00
Lift tickets	220.52	567.10
Permits, entrance fees	--	7.89
Equipment rental	31.24	247.38
Snowmobile/Snowcoach	--	210.16
Guided trip	--	242.20
Lessons	79.85	346.22
Other services	50.53	192.34

4. Bridger Bowl

Bridger Demographics

Resident respondents were 62 percent male and 38 percent female while the nonresidents were 61 percent male and 39 percent female. The average age of respondents in this study was 38.7 for resident skiers and 43.9 for nonresident skiers.

The range of ages within the skier group varied between resident and nonresident skiers with the largest represented group for residents being 25-34 years old while nonresidents were more likely to be in the 45-54 age group (Table 4.1).

Table 4.1: Percent of Skier Groups with Various Ages

Age Groups	Resident (n=310)	Nonresident (n=141)
0-5 years old	3%	5%
6-10 years old	18%	24%
11-17 years old	16%	34%
18-24 years old	20%	21%
25-34 years old	31%	20%
35-44 years old	29%	33%
45-54 years old	21%	41%
55-64 years old	12%	21%
65-74 years old	3%	1%
75 and over	<1%	1%

*Numbers may not add to 100% due to rounding.

Household income levels between resident and nonresident skiers varied significantly. While 63 percent of nonresidents have a household income over \$100,000, only 11 percent of residents have earned that same income level (Table 4.2).

Table 4.2: Household Income

Household Income	Resident* (n=296)	Nonresident* (n=141)
<\$25,000	22%	6%
\$25,000-\$49,999	19%	8%
\$50,000-\$74,999	29%	9%
\$75,000-\$99,999	19%	24%
\$100,000-\$149,999	7%	27%
\$150,000-\$199,999	1%	17%
\$200,000+	3%	9%

*Numbers may not add to 100% due to rounding.

Bridger Trip Characteristics

Resident: Sixty-five percent of resident skiers did not spend a night away from home while 14 percent spent one night and 15 percent spent two nights away from home (Table 4.3). The average length of stay was 0.64 nights

Nonresident: On average, nonresidents spent 6.57 nights in Montana on this ski trip. Four nights away from home was the most common response (Table 4.3).

Table 4.3: Nights from Home

Nights away from home	Resident* (n=109)	Nonresident* (n=143)
0	65%	1%
1	14%	--
2	15%	2%
3	6%	9%
4	-	24%
5	1%	20%
6	-	18%
7	-	9%
8	-	6%
9	-	2%
10 + nights	-	8%

*Numbers may not add to 100% due to rounding.

Resident and Nonresident: Of those Bridger Bowl skiers who spent a night away from home, they were most likely to stay in a hotel followed by the home of friends and relatives (Table 4.4).

Table 4.4: Types of Accommodations (for those staying overnight)

Accommodation Type	Resident (n=26)	Nonresident (n=136)
Hotel/Motel	62%	44%
My condo	-	--
My 2 nd home	-	6%
Rental home/cabin/condo	-	15%
B&B	-	2%
Home of friend/relative	42%	38%
Lodge	4%	<1%

*Numbers may not add to 100% due to rounding.

Resident: On average, residents drove 46 miles from home but ranged from two to 550 miles (Table 4.5).

Table 4.5: Resident Miles from Home

Miles	% of skiers (n=311)
10 Miles or less	1%
11-25 miles	62%
26-50 miles	16%
51-75 miles	6%
76-100 miles	3%
101-150 miles	7%
Over 150 miles	5%

*Numbers may not add to 100% due to rounding.

Nonresident: More nonresident skiers came from Minnesota and North Dakota than any other state or province followed by California, Colorado, and Texas (Table 4.6). Nonresidents represented 33 U.S. states, two Canadian provinces (British Columbia and Saskatchewan) and one foreign country (Australia).

Table 4.6: Nonresident Place of Residence

From:	% of skier groups (n= 145)
Minnesota	17%
North Dakota	15%
California	8%
CO, TX	6%
Utah	5%
MI, WY, Sask.	4%
ID, WI	3%
AK, AR, CT, FL, GA, HA, IL, IN, IA, KY, LA, ME, MD, MA, OK, OR, PA, SC, SD, TN, VT, VA, WA	2% or less

Bridger Ski Characteristics

Seventy-three percent of resident groups skiing at Bridger Bowl had at least one person in their group with a season pass. Fifteen percent of the nonresident skier groups at Bridger Bowl had at least one person in their group with a season pass.

Resident: The vast majority of residents (93%) only skied one day on their ski trip. The average number of days skiing/boarding in Montana on this trip was 1.09 days.

Nonresident: While the average number of nights in Montana was 6.57, the average number of days skiing/boarding was 5.77. This indicates that nonresident skiers at Bridger Bowl skied all but one day on their visit to Montana (Table 4.7).

Table 4.7: Number of days Skiing/boarding on this trip

Days	Resident (n=302)	Nonresident (n=145)
1	93%	9%
2	5%	19%
3	1%	20%
4	<1%	25%
5	-	13%
6	-	3%
7 +	-	8%

*Numbers may not add to 100% due to rounding.

Nonresident: When asked about the purposes for their trip to Montana, 99 percent said to ski/board along with vacation (79%) and visiting friends and relatives (40%). The primary purpose, however, showed that 56 percent came mainly to ski/board in Montana (Table 4.8).

Table 4.8: Nonresident purpose of Trip

(n=141)	All purposes*	Primary Purpose
Ski/Snowboard	99%	56%
Vacation	79%	15%
VFR	40%	22%
Other	5%	4%
Business	4%	2%
Passing Through	1%	1%
Shopping	4%	1%

*Respondent could check all that apply

Nonresident: Nonresidents were more likely to arrive in Montana by private auto (59%) while 40 percent arrived by plane (Table 4.9).

Table 4.9: Nonresident Transportation into MT

Type of Transportation used	% (n=140)
Air	40%
Auto/Truck/RV	59%
Train	--
Bus	1%

Resident: Residents were most likely to be skiing with friends while at Bridger Bowl (Table 4.10). Average group size for resident skiers was 2.07 people.

Nonresident: By far, the most frequent group type for nonresidents was immediate family (Table 4.10). The average group size for nonresident skiers was 2.6 people.

Table 4.10: Type of Travel Group

Group Type	Resident (n=312)	Nonresidents (n=128)
Self	13%	3%
Couple	12%	13%
Immediate family	24%	37%
Extended family	4%	12%
Family & friends	8%	13%
Friends	38%	17%
Business Associates	1%	1%
Organized Group/club	<1%	3%

*Numbers may not add to 100% due to rounding.

Resident/Nonresident: Respondents were asked if they were skiing or boarding today and to identify their ability level in skiing/boarding. Residents (59%) were much more likely to claim advanced abilities than nonresidents (49%), and both groups were more likely to be skiing over snowboarding (Table 4.11).

Table 4.11: Activity Type and Ability Level

	Resident (n=302)	Nonresident (n=140)
Type of Activity		
Skiing	73%	76%
Snowboarding	25%	19%
Both	2%	4%
Ability Level		
Beginner	6%	5%
Intermediate	36%	46%
Advanced	59%	49%

*Numbers may not add to 100% due to rounding.

Bridger Resort Choice and Information Sources

Resident: Residents chose to ski at Bridger Bowl because of location (83%) over any other reason, followed by terrain of the area (51%) (Table 4.12).

Nonresident: Location was the number one reason for nonresidents to ski at Bridger Bowl (69%), but terrain (62%), reputation (57%) and price (55%) were all reasons that the majority of nonresidents chose to ski at Bridger (Table 4.12).

Table 4.12: Why Visit Bridger Bowl?

	Resident (n=301)	Nonresident (n=143)
Price	42%	55%
Terrain	51%	62%
Location	83%	69%
Recommendation	5%	29%
Short lift lines	17%	13%
Reputation	27%	57%
Own condo/home here	3%	5%
Family friendly	27%	20%

Resident: More than half of the skiers at Bridger Bowl skied at Big Sky and Moonlight this ski season. Additionally, 22 percent skied at Discovery, 21 percent at Red Lodge, and 18 percent at Whitefish (Table 4.13). Bridger skiers were more likely to ski at a variety of resorts than any other skier group in this study. Only 14 percent of skiers said they would not ski at any other resort in Montana this season.

Nonresident: Big Sky, Moonlight and Red Lodge were the three areas that nonresidents at Bridger were most likely ski this season (Table 4.13).

Table 4.13: Other MT Ski Areas Visited this Ski Season

Other MT Ski Areas	% Resident Visiting Other Ski Resorts (n=314)	% Nonresident Visiting Other Ski Resorts (n=111)
Bear Paw Ski Bowl	--	--
Big Sky Resort	58%	53%
Blacktail Mountain	3%	--
Bridger Bowl	---	--
Discovery Basin	22%	6%
Great Divide	9%	<1%
Lookout	3%	<1%
Lost Trail	9%	<1%
Maverick Mountain	9%	2%
Montana Snowbowl	10%	1%
Moonlight Basin	52%	23%
Red Lodge Mountain	21%	17%
Showdown Montana	12%	1%
Turner Mountain	<1%	--
Whitefish Mountain	18%	3%
Will not ski other MT ski areas	14%	36%

Resident: The Bridger home page was used by 56 percent of resident skiers. No other information source was used much at all by residents (Table 4.14).

Nonresidents: Nonresident were most likely to use the ski area homepage (65%) for their information gathering followed by the Montana winter guide or Travel Planner (26%) (Table 4.14). Bridger Bowl nonresident skiers showed the highest usage of the travel guides compared to all other skiers.

Table 4.14: Sources of Information Used

	Resident (n=312)	Nonresident (n=113)
None	39%	22%
Word of mouth	2%	8%
Internet search engine	2%	8%
Ski area homepage	56%	65%
Social networking	2%	1%
On-line consumer review	<1%	6%
Video/You Tube/Podcast	<1%	3%
Blogs, wiki	-	--
MT Planner/wtr guide	-	26%
Magazine ad/article	-	4%
Radio ad	2%	1%
TV ad	-	--

Bridger Expenditure Patterns

Resident: There were no residents who indicated they had purchased any sort of ski/travel package for Bridger Bowl.

Nonresident: Nineteen percent of Bridger Bowl nonresident skiers purchased some variety of a travel/ski package ranging from \$178 to \$3,500. Of those who purchased packages, 96 percent said it

included lift tickets; 93 percent had accommodations included, and; four percent included equipment rental.

Resident: Resident skiers at Bridger Bowl spent most of their money for their trip on lift tickets followed by gasoline. Their average trip expenditure was \$110.63 (Table 4.15). Resident skiers at Bridger spent \$7 million during the 09/10 season.

Nonresident: Nonresidents spent more of their trip expenditure on lift tickets followed by retail. Average group expenditures for nonresidents while in Montana were \$1,332.95 (Table 4.15). Nonresidents skiing at Bridger Bowl during the 09/10 ski season contributed \$5.4 million to the Montana economy.

Table 4.15: Average Expenditures/ski trip by residents and nonresidents

Expenditure Type	Resident	Nonresident
Accommodations	\$ 4.78	\$ 145.56
Gas	15.52	105.15
Restaurant, bar	27.06	251.03
Groceries	8.04	110.51
Transport fares	--	0.86
Auto/RV rental	--	70.00
Retail	8.74	261.20
Lift tickets	35.36	267.65
Permits, entrance fees	0.45	9.96
Equipment rental	3.00	30.92
Snowmobile/Snowcoach	--	18.87
Guided trip	--	5.37
Lessons	5.85	24.74
Other services	1.83	31.13
Avg. \$/group/trip	\$110.63	\$1,332.95

Table 4.16 shows an average expenditure within each category for those people who spent money in that category. This provides a more realistic look at actual costs to the consumer.

Table 4.16: Expenditures per group/ski trip by those who actually spent money in each category

Expenditure Type	Resident	Nonresident
Accommodations	\$93.10	\$397.87
Gas	17.56	122.30
Restaurant, bar	29.81	257.30
Groceries	11.91	122.46
Transport fares	--	14.07
Auto/RV rental	--	266.97
Retail	39.26	342.69
Lift tickets	80.67	365.79
Permits, entrance fees	9.42	24.75
Equipment rental	20.84	76.84
Snowmobile/Snowcoach	--	238.05
Guided trip	--	80.06
Lessons	41.65	135.22
Other services	--	100.10

5. Discovery Mountain

⚠ **CAUTION:** When interpreting the Discovery data, readers should be aware of the small sample size of 33 people for nonresidents. While percentages are still presented here, even a high percent such as 50% would only represent 16.5 people.

Discovery Demographics

Resident respondents were 52 percent male and 48 percent female while the nonresidents were 58 percent male and 42 percent female. The average age of respondents in this study was 41.8 for resident skiers and 40.1 for nonresident skiers.

The range of ages within the skier group varied somewhat between resident and nonresident skiers (Table 5.1). The age group represented the most by residents was 35-44, while nonresidents were most likely to fit in the 18-24 age group.

Table 5.1: Percent of Skier Groups with Various Ages

Age Groups	Resident (n=314)	Nonresident (n=33)
0-5 years old	12%	3%
6-10 years old	19%	6%
11-17 years old	19%	19%
18-24 years old	21%	28%
25-34 years old	19%	22%
35-44 years old	31%	19%
45-54 years old	29%	19%
55-64 years old	17%	25%
65-74 years old	6%	6%
75 and over	1%	--

Household income levels between resident and nonresident skiers did not vary as significantly as other ski area. This may be due in part to the small nonresident sample size (Table 5.2).

Table 5.2: Household Income

Household Income	Resident* (n=261)	Nonresident* (n=33)
<\$25,000	19%	19%
\$25,000-\$49,999	20%	12%
\$50,000-\$74,999	19%	8%
\$75,000-\$99,999	18%	23%
\$100,000-\$149,999	15%	19%
\$150,000-\$199,999	6%	12%
\$200,000+	4%	8%

*Numbers may not add to 100% due to rounding.

Discovery Trip Characteristics

Resident: Sixty-five percent of resident skiers did not spend a night away from home while 19 percent spent one night, and 11 percent spent two nights away from home (Table 5.3). Average nights spent was 0.74.

Nonresident: On average, nonresidents spent 4.46 nights in Montana on this ski trip but a seven night stay was the most common (Table 5.3).

Table 5.3: Nights from Home

Nights away from home	Resident* (n=179)	Nonresident* (n=28)
0	65%	7%
1	19%	7%
2	11%	14%
3	3%	11%
4	1%	18%
5	--	4%
6	--	4%
7	--	29%
8	<1%	4%
9	--	--
10 + nights	<1%	4%

*Numbers may not add to 100% due to rounding.

Resident: Staying at the home of a friend or relative was most common by those residents spending a night (43%). This was followed by those spending a night in a hotel (Table 5.4).

Nonresident: Nonresidents were also most likely to spend the night in the home of friend or relative followed by a hotel (Table 5.4).

Table 5.4: Types of Accommodations (if staying overnight)

Accommodation Type	Resident (n=49)	Nonresident (n=26)
Hotel/Motel	27%	50%
My condo	10%	--
My 2 nd home	10%	--
Rental home/cabin/condo	10%	8%
B&B	2%	4%
Home of friend/relative	43%	58%
Lodge	2%	4%

Resident: On average residents drove 76 miles from home but ranged from four to 500 miles (Table 5.5).

Table 5.5: Resident Miles from Home

Miles	% of skiers (n=288)
10 Miles or less	2%
11-25 miles	14%
26-50 miles	27%
51-75 miles	6%
76-100 miles	35%
101-150 miles	12%
Over 150 miles	4%

*Numbers may not add to 100% due to rounding.

Nonresident: The small sample size of nonresident skiers at Discovery only allows displaying the number from each state as opposed to the percent. Three groups came from Colorado which was the most represented state. Eighteen states and two foreign countries (England/UK and Argentina) were represented (Table 5.6).

Table 5.6: Nonresident Place of Residence

From:	# of skier groups (n=30)
Colorado	3
AK, CA, MA, MN, OR, VT, WA, WI	2 groups each
AR, FL, MI, NV, ND, OH, TX, VA, WY, England, Argentina	1 group each

Discovery Ski Characteristics

Fifty-seven percent of resident groups skiing at Discovery had at least one person with a season pass. Sixty-four percent of the nonresident skier groups at Discovery had at least one person in their group with a season pass.

Resident: Eighty-six percent of residents were only skiing for one day on this trip. The average days skiing/boarding in Montana on this trip was 1.2 (Table 5.7).

Nonresident: Most nonresidents were only skiing one day (46%) followed by 18 percent skiing for two days (Table 5.7). While the average number of nights in Montana was 4.46, the average number of days skiing/boarding was 3.61.

Table 5.7: Number of days Skiing/boarding on this trip

Days	Resident (n=298)	Nonresident (n=33)
1	86%	46%
2	10%	18%
3	<1%	15%
4	1%	3%
5	<1%	3%
6	-	6%
7 +	<1%	7%

*Numbers may not add to 100% due to rounding.

Nonresident: When asked about the purposes for their trip to Montana, 63 percent said visiting friends and relatives and 43 percent indicated skiing/boarding. The primary purpose showed that 46 percent were in Montana to visit friends and relatives

indicating that skiing was a secondary purpose for almost half of the nonresident skiers (Table 5.8).

Table 5.8: Nonresident purpose of Trip

	All purposes* (n=30)	Primary Purpose (n=27)
Ski/Snowboard	43%	23%
Vacation	20%	12%
VFR	63%	46%
Other	27%	12%
Business	7%	8%
Passing Through	--	--
Shopping	--	--

*Respondents could check all that apply

Nonresident: Fifty-nine percent of the nonresidents arrived in Montana via private auto while 41 percent entered the state by air (Table 5.9).

Table 5.9: Nonresident Transportation into MT

Type of Transportation used	% (n=29)
Air	41%
Auto/Truck/RV	59%
Train	--
Bus	--

Resident: Immediate family was the typical group type of resident skiers at Discovery (33%) followed by those skiing with friends (21%) (Table 5.10). The average group size for resident skiers was 2.68 people.

Nonresident: Nonresidents were more likely to be skiing with friends followed by immediate family (Table 5.10). Average group size for nonresident skiers was 1.63 people.

Table 5.10: Type of Travel Group

Group Type	Resident (n=313)	Nonresidents (n=31)
Self	14%	7%
Couple	11%	3%
Immediate family	33%	29%
Extended family	5%	10%
Family & friends	11%	13%
Friends	21%	32%
Business Associates	<1%	--
Organized Group/club	5%	7%

*Numbers may not add to 100% due to rounding.

Resident/Nonresident: Respondents were asked if they were skiing or boarding today and to identify their ability level in skiing/boarding. Seventy-two percent of both groups were more likely to be skiing over snowboarding. Nonresidents were much more likely to claim advanced abilities than residents (Table 5.11).

Table 5.11: Activity Type and Ability Level

Type of Activity	Resident (n=299)	Nonresident (n=32)
Skiing	72%	72%
Snowboarding	17%	22%
Both	11%	6%

Table 5.11 Cont'd. Ability Level		
Beginner	7%	6%
Intermediate	45%	28%
Advanced	48%	66%

*Numbers may not add to 100% due to rounding.

Discovery Resort Choice and Information Sources

Resident: Resident skiers chose to ski at Discovery because of its location and its family friendly reputation (Table 5.12).

Nonresident: Location was the number one reason for nonresidents to ski at Discover (69%) followed by price (44%) (Table 5.12).

Table 5.12: Why visit Discovery?

	Resident (n=312)	Nonresident (n=32)
Price	47%	44%
Terrain	41%	41%
Location	62%	69%
Recommendation	19%	41%
Short lift lines	27%	38%
Reputation	32%	34%
Own condo/home here	4%	6%
Family friendly	52%	31%

Resident: Seventy-two percent of residents said they would ski at other Montana resorts with Big Sky (26%) and Lost Trail (24%) the most common response (Table 5.13).

Nonresident: Lost Trail was the most likely other Montana ski area that Discovery nonresidents said they would ski this season (Table 5.13).

Table 5.13: Other MT Ski Areas Visited this Ski Season

Other MT Ski Areas	% Resident Visiting Other Ski Resorts (n=317)	% Nonresident Visiting Other Ski Resorts (n=33)
Bear Paw Ski Bowl	<1%	--
Big Sky Resort	26%	21%
Blacktail Mountain	3%	6%
Bridger Bowl	22%	15%
Discovery Basin	--	--
Great Divide	12%	9%
Lookout	13%	12%
Lost Trail	24%	30%
Maverick Mountain	5%	--
Montana Snowbowl	16%	21%
Moonlight Basin	8%	6%
Red Lodge Mountain	7%	9%
Showdown Montana	10%	6%
Turner Mountain	1%	--
Whitefish Mountain	19%	21%
Will not visit other MT ski areas	28%	39%

Resident: Residents used the ski area home page as their information source (45%) over other sources, but many (38%) did use any information sources at all (Table 5.14).

Nonresidents: Similar to residents, nonresidents used the ski area homepage for their information gathering (46%) followed by word of mouth (30%) (Table 5.14).

Table 5.14: Sources of Information Used

	Resident (n=312)	Nonresident (n=33)
None	38%	24%
Word of mouth	23%	30%
Internet search engine	9%	27%
Ski area homepage	45%	46%
Social networking	1%	--
On-line consumer review	--	3%
Video/You Tube/Podcast	<1%	--
Blogs, wiki	--	--
MT Planner/wtr guide	--	--
Magazine ad/article	1%	3%
Radio ad	5%	3%
TV ad	--	--

Discovery Expenditure Patterns

Neither resident nor nonresident skiers at Discovery purchased ski/travel packages for this trip.

Resident: Resident skiers at Discovery spent over 1/3 of their expenditures on lift tickets followed by gas expenses (Table 5.15). Residents spent \$1.4 million while skiing at Discovery during the 09/10 ski season.

Nonresident: Nonresidents spent more of their trip expenditure on restaurant and bar followed by lift tickets than on any other expenditure (table 5.15). Average group expenditures for

nonresidents while in Montana were \$272.14. Nonresidents skiing at Discovery during the 09/10 ski season contributed \$164,000 to the Montana economy.

Table 5.15 Average Expenditures/ski trip by residents and nonresidents

Expenditure Type	Resident	Nonresident
Accommodations	\$2.43	\$45.51
Gas	23.71	62.21
Restaurant, bar	14.48	65.52
Groceries	5.09	10.79
Transport fares	--	--
Auto/RV rental	--	14.77
Retail	0.77	--
Lift tickets	30.66	60.86
Permits, entrance fees	--	--
Equipment rental	3.60	10.71
Snowmobile/Snowcoach	--	--
Guided trip	--	--
Lessons	4.11	1.77
Other services	--	--
Avg. \$/group/trip	\$84.85	272.14

Table 5.16 shows an average expenditure within each category for those people who spent money in that category. This provides a more realistic look at actual costs to the consumer.

Table 5.16: Expenditures per group/ski trip by those who actually spent money in each category

Expenditure Type	Resident	Nonresident
Accommodations	\$62.09	\$186.59
Gas	26.00	82.27
Restaurant, bar	18.68	86.66
Groceries	13.71	31.60
Transport fares	--	--
Auto/RV rental	--	151.37
Retail	16.97	--
Lift tickets	60.73	95.96
Permits, entrance fees	--	--
Equipment rental	22.52	54.87
Snowmobile/Snowcoach	--	--
Guided trip	--	--
Lessons	45.07	26.14
Other services	--	--

6. Moonlight Basin

Demographics

Resident respondents were 53 percent male and 47 percent female, and the nonresidents were 54 percent male and 46 percent female. The average ages of respondents in this study was 34.6 for resident skiers and 39.3 for nonresident skiers.

The range of ages of resident and nonresident had many similarities with a few striking differences. The 35-44 age group was the most represented for both groups, however the 18-24 age group was the next highest for residents while the 45-54 age group with the next highest for nonresident skiers (Table 6.1).

Table 6.1: Percent of Skier Groups with Various Ages

Age Groups	Resident (n=219)	Nonresident (n=235)
0-5 years old	6%	6%
6-10 years old	20%	18%
11-17 years old	14%	19%
18-24 years old	28%	27%
25-34 years old	25%	20%
35-44 years old	39%	34%
45-54 years old	15%	29%
55-64 years old	11%	12%
65-74 years old	3%	5%
75 and over	1%	1%

Household income levels between resident and nonresident skiers varied significantly. With the younger resident skier, the lower household income for residents is not surprising (Table 6.2).

Table 6.2: Household Income

Household Income	Resident* (n=215)	Nonresident* (n=234)
<\$25,000	27%	20%
\$25,000-\$49,999	15%	9%
\$50,000-\$74,999	26%	9%
\$75,000-\$99,999	24%	21%
\$100,000-\$149,999	7%	21%
\$150,000-\$199,999	1%	16%
\$200,000+	1%	6%

*Numbers may not add to 100% due to rounding.

Moonlight Trip Characteristics

Resident: Seventy-four percent of resident skiers did not spend a night away from home while 11 percent spent one night (Table 6.3). Average length of stay was 0.71 nights.

Nonresident: Most nonresidents spent between four and seven nights in Montana on this ski trip (Table 6.3). On average, nonresidents spent 6.69 nights in Montana.

Table 6.3: Nights from Home

Nights away from home	Resident* (n=184)	Nonresident* (n=220)
0	74%	7%
1	11%	2%
2	6%	2%
3	5%	4%
4	2%	13%
5	<1%	18%
6	1%	17%
7	-	16%
8	-	6%
9	-	2%
10 + nights	<1%	8%

*Numbers may not add to 100% due to rounding.

Resident: Residents were most likely to spend a night at the home of a friend or relative followed by a hotel room (Table 6.4).

Nonresident: Spending the night in a rental cabin/condo was reported by 36% of nonresidents followed by 34 percent who indicated nights in hotels (Table 6.4).

Table 6.4: Types of Accommodations (for those who spent a night)

Accommodation Type	Resident (n=51)	Nonresident (n=196)
Hotel/Motel	29%	34%
My condo	8%	11%
My 2 nd home	2%	4%
Rental home/cabin/condo	18%	36%
B&B	-	2%
Home of friend/relative	41%	25%
Lodge	2%	2%

Resident: On average, residents drove 86 miles from home but ranged from 0 to 400 miles (Table 6.5).

Table 6.5: Resident Miles from Home

Miles	% of skiers (n=220)
10 Miles or less	21%
11-25 miles	2%
26-50 miles	30%
51-75 miles	16%
76-100 miles	8%
101-150 miles	11%
Over 150 miles	14%

*Numbers may not add to 100% due to rounding.

Nonresident: Nonresident skiers were more likely to come from Minnesota than any other state/province (Table 6.6). Nonresidents represented 41 U.S. states (plus D.C.), two Canadian provinces (Alberta and Ontario) and two other foreign countries (Australia and England/UK).

Table 6.6: Nonresident Place of Residence

From:	% of skier groups (n=235)
Minnesota	11%
Pennsylvania	6%
CA, FL	5%
MI, ND,	4%
AZ, CO, CT, GA, ID, NY, NC, SC, SD, TN, WY	3%
AL, AR, HA, IL, IN, IA, KY, ME, MD, MA, MS, MO, NE, NH, NJ, NM, OH, OR, RI, TX, UT, VT, VA, WA, DC	2% or less
ALB, ONT, Australia, UK	<1% ea.

Moonlight Ski Characteristics

Fifty-two percent of resident groups skiing at Moonlight Basin had at least one person with a season pass. Twenty-four percent of the nonresident skier groups at Moonlight had at least one person in their group with a season pass.

Resident: The average days skiing/boarding in Montana on this trip was 1.2, but the vast majority (84%) skied only one day (Table 6.7).

Nonresident: While the average number of nights in Montana was 6.69, the average number of days skiing/boarding was 3.95. This means nonresidents, while here to ski, either did other activities while on their ski vacation in Montana or spent the remaining days driving in Montana to and from the ski area (Table 6.7).

Table 6.7: Number of days Skiing/boarding on this trip

Days	Resident (n=217)	Nonresident (n=229)
1	84%	20%
2	12%	10%
3	3%	16%
4	<1%	20%
5	<1%	20%
6	<1%	7%
7 +	-	6%

*Numbers may not add to 100% due to rounding.

Nonresident: When asked about the purposes for their trip to Montana, 84 percent said to ski/board along with vacation (56%) and visiting friends and relatives (34%). The primary purpose, however, showed that 56 percent came just to ski/board in Montana followed by 20 percent primarily here to visit friends or relatives (Table 6.8)

Table 6.8: Nonresident purpose of Trip

	All purposes* (n=196)	Primary Purpose (n=179)
Ski/Snowboard	84%	56%
Vacation	56%	18%
VFR	34%	20%
Other	8%	3%
Business	3%	1%
Passing Through	2%	2%
Shopping	1%	--

*Respondents could check all that apply

Nonresident: Nonresidents were significantly more likely to arrive in Montana via air (77%) than private auto (22%) (Table 6.9).

Table 6.9: Nonresident Transportation into MT

Type of Transportation used	% (n=194)
Air	77%
Auto/Truck/RV	22%
Train	--
Bus	1%

Resident: Skiing with friends was the most common group type by residents (33%) (Table 6.10). Average group size for resident skiers was 2.18 people.

Nonresident: Nonresident skiers were slightly more likely to be with their immediate family (26%) than with friends (23%) (Table 6.10). Average group size for resident skiers was 2.34 people.

Table 6.10: Type of Travel Group

Group Type	Resident (n=219)	Nonresidents (n=236)
Self	13%	10%
Couple	15%	22%
Immediate family	23%	26%
Extended family	2%	7%
Family & friends	11%	10%
Friends	33%	23%
Business Associates	<1%	2%
Organized Group/club	2%	1%

*Numbers may not add to 100% due to rounding.

Resident/Nonresident: While both groups of respondents were more likely to be skiing over snowboarding (Table 6.11), many more residents were snowboarding compared to nonresidents. Additionally, residents were much more likely to claim advanced abilities than nonresidents (Table 6.11).

Table 6.11: Activity Type and Ability Level

	Resident (n=215)	Nonresident (n=233)
Type of Activity		
Skiing	61%	79%
Snowboarding	38%	20%
Both	1%	1%
Ability Level		
Beginner	3%	10%
Intermediate	21%	43%
Advanced	76%	48%

*Numbers may not add to 100% due to rounding.

Moonlight Resort Choice and Information Sources

Resident: Residents were more likely to choose Moonlight as a ski area because of the price (54%) followed by terrain of the area (40%) (Table 6.12).

Nonresident: Price (46% of respondents) and terrain (43%) were the top two reasons for nonresidents to ski at Moonlight (Table 6.12).

Table 6.12: Why visit Moonlight?

	Resident (n=214)	Nonresident (n=233)
Price	54%	46%
Terrain	40%	43%
Location	30%	36%
Recommendation	23%	35%
Short lift lines	23%	25%
Reputation	13%	14%
Own condo/home here	7%	14%
Family friendly	30%	28%

Resident: Only 17 percent of Moonlight resident skiers indicated they would not ski other Montana resorts this season. Moonlight skiers were most likely to ski Big Sky (50%) and Bridger Bowl (47%) (Table 6.13).

Nonresident: Sixty percent of nonresident Moonlight skiers skied at Big Sky followed by 15 percent at Bridger (Table 6.13).

Table 6.13: Other MT Ski Areas Visited this Ski Season

Other MT Ski Areas	% Resident Visiting Other Ski Resorts (n=111)	% Nonresident Visiting Other Ski Resorts (n=236)
Bear Paw Ski Bowl	1%	<1%
Big Sky Resort	50%	60%
Blacktail Mountain	0	<1%
Bridger Bowl	47%	15%
Discovery Basin	6%	<1%
Great Divide	10%	<1%
Lookout	<1%	<1%
Lost Trail	1%	<1%
Maverick Mountain	0	--
Montana Snowbowl	5%	<1%
Moonlight Basin	--	--
Red Lodge Mountain	8%	2%
Showdown Montana	5%	--
Turner Mountain	<1%	--
Whitefish Mountain	2%	1%
Will not visit other MT ski areas	17%	34%

Resident: Most residents did not use any information sources for their ski trip (42%), but when they did, 38 percent indicated word of mouth as their information source (Table 6.14).

Nonresidents: Nonresidents were most likely to use word of mouth (41%) and the ski area homepage (40%) for their information gathering (Table 6.14). Social networking, such as Facebook, was used by 21 percent of nonresidents, while nine percent used consumer reviews for information. Moonlight and Big Sky were the

only two resorts where social networking and reviews were used by a significant number of skiers.

Table 6.14: Sources of Information Used

	Resident (n=215)	Nonresident (n=236)
None	42%	19%
Word of mouth	38%	41%
Internet search engine	7%	40%
Ski area homepage	16%	31%
Social networking	12%	21%
On-line consumer review	<1%	9%
Video/You Tube/Podcast	2%	2%
Blogs, wiki	--	<1%
MT Planner/wtr guide	--	9%
Magazine ad/article	<1%	1%
Radio ad	1%	--
TV ad	--	--

Moonlight Expenditure Patterns

Resident: Five percent of Moonlight skiers purchased some form of a ski/travel package. Of those who purchased a package, 79 percent included lift tickets; 21 percent included accommodations; 7 percent had car rental included; 7 percent had an airline package; 14 percent included a spa; 14 percent included food/beverage; 21 percent had equipment rental; 71 percent had some other product/service included in their package.

Nonresident: Twelve percent of Moonlight nonresident visitors purchased some variety of a travel/ski package ranging from \$100 to \$6,200. Of those who purchased packages, 84 percent included lift tickets; 42 percent had accommodations included; seven percent

had car rental; seven percent included airline tickets; 10 percent included spa treatments; 13 percent had food/beverage included; 48 percent included equipment rental; and 84 percent indicated that other products/services were included in their package.

Resident: Resident skiers spent most of the money (42%) on lift tickets followed by expenditures on restaurant and bar. Residents skiing at Moonlight spent \$2.9 million during the 09/10 season.

Nonresident: Nonresidents spent more of their trip expenditure on accommodations than any other expenditure followed by expenditures on lift tickets (Table 6.15). Average group expenditures for nonresidents while in Montana were \$1,358.21. Nonresidents skiing at Moonlight during the 09/10 ski season contributed \$7 million to the Montana economy.

Table 6.15: Average Expenditures/ski trip by residents and nonresidents

Expenditure Type	Resident	Nonresident
Accommodations	\$17.33	395.83
Gas	15.71	41.50
Restaurant, bar	24.33	185.23
Groceries	14.97	119.29
Transport fares	--	5.20
Auto/RV rental	--	90.38
Retail	0.97	35.41
Lift tickets	59.39	342.84
Permits, entrance fees	--	0.29
Equipment rental	1.49	50.27
Snowmobile/Snowcoach	--	5.78
Guided trip	--	10.64
Lessons	4.54	36.67

Table 6.15 continued		
Other services	1.88	38.88
Avg. \$/group/trip	\$140.61	\$1,358.21

Table 6.16 shows an average expenditure within each category for those people who spent money in that category. This provides a more realistic look at actual costs to the consumer.

Table 6.16: Expenditures per group/ski trip by those who actually spent money in each category

Expenditure Type	Resident	Nonresident
Accommodations	\$173.28	\$878.81
Gas	37.97	75.50
Restaurant, bar	39.61	212.44
Groceries	25.56	142.21
Transport fares	--	62.91
Auto/RV rental	--	291.64
Retail	25.45	119.03
Lift tickets	105.69	432.12
Permits, entrance fees	--	10.12
Equipment rental	39.12	190.09
Snowmobile/Snowcoach	--	139.85
Guided trip	--	183.96
Lessons	105.97	286.24
Other services	28.17	184.51

7. Red Lodge Mountain

Red Lodge Demographics

Resident respondents were 61 percent male and 39 percent female while the nonresidents were 54 percent male and 46 percent female. The average age of respondents in this study was 43.4 for resident skiers and 44.3 for nonresident skiers.

The range of ages within the skier group did not vary much between resident and nonresident skiers. The 11-17 age group and the 45-54 age group were the two highest for both resident and nonresident skiers (Table 7.1).

Table 7.1: Percent of Skier Groups with Various Ages

Age Groups	Resident (n=154)	Nonresident (n=135)
0-5 years old	8%	6%
6-10 years old	21%	15%
11-17 years old	33%	35%
18-24 years old	17%	30%
25-34 years old	23%	23%
35-44 years old	31%	29%
45-54 years old	32%	38%
55-64 years old	18%	25%
65-74 years old	6%	9%
75 and over	2%	2%

Household income levels between resident and nonresident skiers had differences; however, Red Lodge skiers had the least disparity between the two groups in income level compared to other ski areas in the study (Table 7.2).

Table 7.2: Household Income

Household Income	Resident* (n=136)	Nonresident* (n=117)
<\$25,000	13%	11%
\$25,000-\$49,999	12%	10%
\$50,000-\$74,999	21%	14%
\$75,000-\$99,999	21%	21%
\$100,000-\$149,999	16%	21%
\$150,000-\$199,999	11%	13%
\$200,000+	5%	11%

*Numbers may not add to 100% due to rounding.

Red Lodge Trip Characteristics

Resident: Fifty-three percent of resident skiers did not spend a night away from home while 24 percent spent one night away from home (Table 7.3). Average length of stay by residents was 0.81 nights.

Nonresident: Nonresident skiers were more likely to spend three nights away from home followed by four nights (Table 7.3). On average, nonresidents spent 4.95 nights in Montana on this ski trip.

Table 7.3: Nights from Home

Nights away from home	Resident* (n=155)	Nonresident* (n=119)
0	53%	6%
1	24%	3%
2	12%	12%
3	11%	25%
4	--	22%
5	--	10%
6	--	9%
7	--	3%
8	--	<1%
9	--	--
10 + nights	--	7%

*Numbers may not add to 100% due to rounding.

Resident: Hotels were used by 59 percent of residents followed by 20 percent who stayed at the home of a friend or relative (Table 7.4).

Nonresident: Nonresidents were most likely to stay at hotels (42%) followed by a rental cabin or condo (26%) (Table 7.4).

Table 7.4: Types of Accommodations (of those who spent a night)

Accommodation Type	Resident (n=41)	Nonresident (n=111)
Hotel/Motel	59%	42%
My condo	7%	1%
My 2 nd home	12%	11%
Rental home/cabin/condo	7%	26%
B&B	2%	1%
Home of friend/relative	20%	22%
Lodge	2%	1%

Resident: On average residents drove 75 miles from home but ranged from 3 to 350 miles (Table 7.5).

Table 7.5: Resident Miles from Home

Miles	% of skiers (n=153)
10 Miles or less	21%
11-25 miles	3%
26-50 miles	19%
51-75 miles	41%
76-100 miles	3%
101-150 miles	3%
Over 150 miles	9%

*Numbers may not add to 100% due to rounding.

Nonresident: Nonresident skiers at Red Lodge were predominantly from Wyoming, North Dakota, and Minnesota (Table 7.6). Nonresidents represented 24 U.S. states, two Canadian provinces (Saskatchewan and Manitoba), and two foreign countries (Australia and Chile).

Table 7.6: Nonresident Place of Residence

From:	% of skier groups (n=133)
Wyoming	24%
Minnesota, North Dakota	23% ea.
Wisconsin	5%
California	3%
AK, AZ, CO, CT, FL, GA, IL, IA, ME, MI, MS, NV, NY, OH, OK, PA, TN, VA, WA, Manitoba, Saskatchewan, Australia, Chile	2% or less

Red Lodge Ski Characteristics

Eighty-two percent of resident groups skiing at Red Lodge had at least one person in their group with a season pass. Twenty-eight percent of the nonresident skier groups at Red Lodge had at least one person in their group with a season pass.

Resident: Most residents (86%) skied only one day on their trip to Red Lodge (Table 7.7). The average number of days skiing/boarding in Montana on this trip was 1.14 days.

Nonresident: Nonresidents were most likely to ski two days on their trip. However, the average number of days skiing/boarding was 3.73 (Table 7.7).

Table 7.7: Number of days Skiing/boarding on this trip

Days	Resident (n=154)	Nonresident (n=131)
1	86%	21%
2	12%	41%
3	1%	21%
4	--	8%
5	--	2%
6	--	-
7 +	--	5%

Nonresident: When asked about the purposes for their trip to Montana, 94 percent said to ski/board along with vacation (61%) and visiting friends and relatives (39%). The primary purpose, however, showed that 78 percent came just to ski/board in Montana (Table 7.8).

Table 7.8: Nonresident purpose of Trip

(n=127)	All purposes*	Primary Purpose
Ski/Snowboard	94%	78%
Vacation	61%	14%
VFR	30%	7%
Other	2%	--
Business	3%	<1%
Passing Through	<1%	--
Shopping	15%	--

* Respondents could check all that apply

Nonresident: Nonresidents were most likely to arrive in Montana via private auto (81%), and 17 percent came by private auto. (Table 7.9).

Table 7.9: Nonresident Transportation into MT

Type of Transportation used	% (n=132)
Air	17%
Auto/Truck/RV	81%
Train	--
Bus	2%

Resident: Resident skiers were most likely to be with their immediate family (27%), but 19 percent came with friends, and 17 percent were with family and friends (table 7.10). Average group size for resident skiers was 2.23 people.

Nonresident: Twenty-eight percent of skiers were with their immediate family followed by 23 percent skiing with family and friends (Table 7.10). Average group size for nonresident skiers was 3.14 people.

Table 7.10: Type of Travel Group

Group Type	Resident (n=155)	Nonresidents (n=134)
Self	12%	4%
Couple	13%	11%
Immediate family	27%	28%
Extended family	6%	7%
Family & friends	17%	23%
Friends	19%	18%
Business Associates	2%	2%
Organized Group/club	5%	8%

*Numbers may not add to 100% due to rounding.

Resident/Nonresident: Respondents were asked if they were skiing or boarding today and to identify their ability level in skiing/boarding. Residents were much more likely to claim advanced abilities than nonresidents and both groups were more likely to be skiing rather than snowboarding (Table 7.11).

Table 7.11: Activity Type and Ability Level

	Resident (n=154)	Nonresident (n=134)
Type of Activity		
Skiing	75%	77%
Snowboarding	18%	16%
Both	7%	8%
Ability Level		
Beginner	7%	11%
Intermediate	51%	62%
Advanced	43%	28%

*Numbers may not add to 100% due to rounding.

Red Lodge Resort Choice and Information Sources

Resident: Not surprisingly, residents chose Red Lodge to ski based on location over any other reason (94%), followed by price (57%) and family friendly area (53%)(Table 7.12).

Nonresident: Location was the number one reason for nonresidents to ski at Red Lodge (88%) followed by price (52%) and family friendly area (46%) (Table 7.12).

Table 7.12: Why visit Red Lodge?

	Resident (n=154)	Nonresident (n=134)
Price	57%	52%
Terrain	32%	33%
Location	94%	88%
Recommendation	14%	34%
Short lift lines	38%	32%
Reputation	36%	35%
Own condo/home here	7%	13%
Family friendly	53%	46%

Resident: One half of the skiers at Red Lodge were also skiing at Big Sky this ski season while 45 percent said they would also ski at Moonlight. Thirty-one percent were not planning to ski at any other Montana resort this season (Table 7.13).

Nonresident: Seventy-two percent of nonresidents did not ski at any other Montana resort this season. The highest number (19%) said they would ski Big Sky while 17 percent said they would ski at Bridger Bowl (Table 7.13).

Table 7.13: Other MT Ski Areas Visited this Ski Season

Other MT Ski Areas	% Resident Visiting Other Ski Resorts (n=142)	% Nonresident Visiting Other Ski Resorts (n=134)
Bear Paw Ski Bowl	--	--
Big Sky Resort	50%	19%
Blacktail Mountain	3%	<1%
Bridger Bowl	45%	17%
Discovery Basin	12%	<1%
Great Divide	5%	--
Lookout	1%	<1%
Lost Trail	5%	--
Maverick Mountain	--	--
Montana Snowbowl	6%	2%
Moonlight Basin	13%	4%
Red Lodge Mountain	--	--
Showdown Montana	11%	<1%
Turner Mountain	<1%	--
Whitefish Mountain	9%	5%
Will not visit other areas	31%	72%

Resident: Fifty percent of residents used the Red Lodge home page for ski information. Other information sources were used very little (Table 7.14).

Nonresidents: Nonresidents were most likely to use the ski area homepage for their information gathering (68%) followed by the Internet search engine (27%) and word of mouth (24%) (Table 7.14).

Table 7.14: Sources of Information Used

	Resident (n=149)	Nonresident (n=128)
None	31%	11%
Word of mouth	15%	24%
Internet search engine	8%	27%
Ski area homepage	50%	68%
Social networking	4%	2%
On-line consumer review	2%	2%
Video/You Tube/Podcast	2%	2%
Blogs, wiki	2%	--
MT Planner/wtr guide	1%	<1%
Magazine ad/article	1%	--
Radio ad	9%	2%
TV ad	3%	5%

Red Lodge Expenditure Patterns

Resident: Thirteen percent of residents indicated they had purchased some form of a ski/travel package. Of those who purchased a package, all of them indicated it included lift tickets; 59 percent said it included equipment rental; five percent had food/beverage included; one person indicated it included spa treatment; and 36 percent indicated it included other products/services.

Nonresident: Sixteen percent of Red Lodge nonresident visitors purchased some variety of a travel/ski package ranging from \$47 to \$2,200. Of those who purchased packages, 93 percent included lift tickets; 52 percent had accommodations included; seven percent had car rental; 11 percent included airline tickets; seven percent included spa treatments; 15 percent had food/beverage included;

41 percent included equipment rental; and 26 percent indicated that other products/services were included in their package.

Resident: Residents skiing at Red Lodge spent the biggest share of the dollar on lift tickets followed closely by expenditures on restaurant and bar (table 7.15). Residents spent \$136.98 per trip to Red Lodge totaling \$3.7 million in the 09/10 season.

Nonresident: Nonresidents spent more of their trip expenditure on restaurant and bar followed closely by accommodation expenses. Average group expenditures for nonresidents while in Montana were \$734.73 (Table 7.15). Nonresidents contributed \$2.6 million to the Montana economy during the 09/10 season.

Table 7.15 Average Expenditures/ski trip by residents and nonresidents

Expenditure Type	Resident	Nonresident
Accommodations	\$17.46	160.70
Gas	18.70	89.02
Restaurant, bar	31.33	176.82
Groceries	6.45	56.28
Transport fares	0.12	0.08
Auto/RV rental	--	13.78
Retail	6.17	74.94
Lift tickets	38.95	134.50
Permits, entrance fees	--	0.07
Equipment rental	13.52	25.62
Snowmobile/Snowcoach	--	--
Guided trip	--	--
Lessons	4.27	2.62
Other services	--	0.30
Avg. \$/group/trip	\$136.98	\$734.73

Table 7.16 shows an average expenditure within each category for those people who spent money in that category. This provides a more realistic look at actual costs to the consumer.

Table 7.16 Expenditures per group/ski trip by those who actually spent money in each category

Expenditure Type	Resident	Nonresident
Accommodations	\$117.70	\$316.68
Gas	19.99	110.44
Restaurant, bar	36.52	194.21
Groceries	14.09	88.72
Transport fares	9.08	5.17
Auto/RV rental	--	153.88
Retail	41.56	116.76
Lift tickets	83.85	204.88
Permits, entrance fees	--	3.26
Equipment rental	59.90	92.78
Snowmobile/Snowcoach	--	--
Guided trip	--	--
Lessons	66.18	35.17
Other services	--	20.38

8. Showdown Montana

Showdown Demographics

Resident respondents were 45 percent male and 55 percent female while the nonresidents were 59 percent male and 41 percent female. The average age of respondents in this study was 40.8 for resident skiers and 36.1 for nonresident skiers.

The range of ages within the skier group varied slightly between resident and nonresident skiers. Interestingly, nonresident skiers were more likely to be younger with the greatest percent in the 18-24 age group (Table 8.1).

Table 8.1: Percent of Skier Groups with Various Ages

Age Groups	Resident (n=333)	Nonresident (n=59)
0-5 years old	9%	7%
6-10 years old	20%	10%
11-17 years old	32%	25%
18-24 years old	21%	37%
25-34 years old	24%	31%
35-44 years old	34%	19%
45-54 years old	28%	22%
55-64 years old	15%	19%
65-74 years old	7%	12%
75 and over	2%	7%

Household income levels between resident and nonresident skiers had some differences. Most notably, nonresidents had the highest percent in the \$25,000 to \$49,999 income range while resident income was spread out more evenly between the most income ranges (Table 8.2).

Table 8.2: Household Income

Household Income	Resident* (n=332)	Nonresident* (n=60)
<\$25,000	13%	13%
\$25,000-\$49,999	19%	27%
\$50,000-\$74,999	21%	17%
\$75,000-\$99,999	20%	20%
\$100,000-\$149,999	14%	8%
\$150,000-\$199,999	7%	3%
\$200,000+	7%	12%

*Numbers may not add to 100% due to rounding.

Showdown Trip Characteristics

Resident: Fifty-nine percent of resident skiers did not spend a night away from home while 14 percent spent one night and 13 percent spent two nights away from home (Table 8.3). The average length of stay was 1.3 nights.

Nonresident: Fifteen percent of the nonresidents indicated that they had not spent a night away from home. Further analysis indicates that these people are either Air Force employees or nonresident students. Most nonresidents indicated spending four nights away from home. However, on average, nonresidents spent 7.08 nights in Montana on this ski trip (Table 8.3).

Table 8.3: Nights from Home

Nights away from home	Resident* (n=207)	Nonresident* (n=53)
0	59%	15%
1	14%	2%
2	13%	6%
3	6%	9%
4	4%	19%
5	1%	6%
6	--	6%
7	<1%	11%
8	--	4%
9	--	2%
10 + nights	1%	15%

*Numbers may not add to 100% due to rounding.

Resident: Skiers were most likely to spend a night in a hotel followed by at the home of a friend or relative (Table 8.4).

Nonresident: The home of a friend or relative was the most likely place for overnight stays by nonresidents (68%) followed by a night in a hotel (Table 8.4).

Table 8.4: Types of Accommodations (for those who spent a night)

Accommodation Type	Resident (n=78)	Nonresident (n=44)
Hotel/Motel	49%	43%
My condo	--	--
My 2 nd home	14%	5%
Rental home/cabin/condo	8%	5%
B&B	--	--
Home of friend/relative	30%	68%
Lodge	--	--

Resident: On average residents drove 100 miles from home, but ranged from five to 350 miles (Table 8.5).

Table 8.5: Resident Miles from Home

Miles	% of skiers (n=331)
10 Miles or less	<1%
11-25 miles	1%
26-50 miles	5%
51-75 miles	40%
76-100 miles	25%
101-150 miles	15%
Over 150 miles	14%

*Numbers may not add to 100% due to rounding.

Nonresident: More nonresident skiers came from Washington and North Dakota than any other state or province (Table 8.6). Nonresidents represented 21 U.S. states, three Canadian provinces and two foreign countries (Japan and Norway).

Table 8.6: Nonresident Place of Residence

From:	% of skier groups (n=60)
Washington	12%
North Dakota	8%
Sask., AZ, CA, MN	7%
OH, WY, Alb	5%
CO, FL, GA, ID, IL, IN, MA, MI, NY, RI, SD, TN, TX, UT,	3% or less
Manitoba, Japan, Norway	1 group each

Showdown Ski Characteristics

Fifty-one percent of resident groups skiing at Showdown had at least one person with a season pass. Thirteen percent of the nonresident skier groups at Showdown had at least one person in their group with a season pass.

Resident: Most residents (83%) skied one day on their ski trip. The average number of days skiing/boarding in Montana on this trip was 1.4 days (Table 8.7).

Nonresident: The average number of days skiing/boarding by nonresidents was 3.24. Most nonresidents, however, skied for only one day (48%) (Table 8.7).

Table 8.7: Number of days Skiing/boarding on this trip

Days	Resident (n=322)	Nonresident (n=62)
1	83%	48%
2	10%	11%
3	3%	13%
4	3%	16%
5	<1%	2%
6	--	3%
7 +	1%	5%

*Numbers may not add to 100% due to rounding.

Nonresident: When asked about the purposes for their trip to Montana, 80 percent said to ski/board along with visiting friends and relatives (58%) and vacation (52%). The primary purpose, however, showed that 40 percent came mainly to visit friends and relatives followed by 38 percent for skiing/boarding (Table 8.8).

Table 8.8: Nonresident purpose of Trip

(n=50)	All purposes*	Primary Purpose
Ski/Snowboard	80%	38%
Vacation	52%	8%
VFR	58%	40%
Other	20%	10%
Business	8%	4%
Passing Through	--	--
Shopping	14%	--

*Respondents could check all that apply

Nonresident: Nonresidents were most likely to arrive in Montana via private auto (65%) while 31 percent entered the state by plane (Table 8.9).

Table 8.9: Nonresident Transportation into MT

Type of Transportation used	% (n=48)
Air	31%
Auto/Truck/RV	65%
Train	2%
Bus	2%

Resident: Resident skiers at Showdown were most likely to be skiing with their immediate family (26%), however 19 percent were skiing with family and friends ,and another 19 percent were skiing with friends (table 8.10). Average group size for resident skiers was 2.83 people.

Nonresident: Skiing with friends was the most common group type for nonresidents (29%) followed by skiing with their immediate family (27%) (Table 8.10). Average group size for resident skiers was 2.2 people.

Table 8.10: Type of Travel Group

Group Type	Resident (n=339)	Nonresidents (n=62)
Self	8%	3%
Couple	12%	5%
Immediate family	26%	27%
Extended family	5%	16%
Family & friends	19%	8%
Friends	19%	29%
Business Associates	--	--
Organized Group/club	12%	11%

*Numbers may not add to 100% due to rounding.

Resident/Nonresident: Respondents were asked if they were skiing or boarding today and to identify their ability level in skiing/boarding. Residents were much more likely to be skiing (70% vs. 48%) while nonresident were more likely than residents to be snowboarding (34% vs. 18%). Residents were a bit more likely to claim advanced abilities (44% vs. 36%) (Table 8.11).

Table 8.11: Activity Type and Ability Level

	Resident (n=326)	Nonresident (n=62)
Type of Activity		
Skiing	70%	48%
Snowboarding	18%	34%
Both	12%	18%
Ability Level		
Beginner	9%	16%
Intermediate	47%	48%
Advanced	44%	36%

*Numbers may not add to 100% due to rounding.

Showdown Resort Choice and Information Sources

Resident/nonresident: skiers were skiing at Showdown for almost every reason provided to them. Apparently, everything except owning a condo or vacation home in the area drew both residents and nonresidents to Showdown. While location was at the top of their list, reputation, price, terrain, and family friendly all rated highly. Recommendation from family or friends was very high for the nonresident skier (61%) (Table 8.12).

Table 8.12: Why visit Showdown?

	Resident (n=330)	Nonresident (n=62)
Price	75%	65%
Terrain	71%	53%
Location	94%	89%
Recommendation	37%	61%
Short lift lines	68%	53%
Reputation	79%	60%
Own condo/home here	6%	7%
Family friendly	71%	58%

Resident: Forty-four percent of residents did not ski at any other Montana ski area, however 26 percent and 22 percent skied at Big Sky and Bridger Bowl, respectively (Table 8.13).

Nonresident: Sixty percent of nonresident skiers did not ski at any other Montana resort. Of those who did, 24 percent skied at Big Sky followed by 18 percent at Bridger Bowl.

Table 8.13: Other MT Ski Areas Visited this Ski Season

Other MT Ski Areas	% Resident Visiting Other Ski Resorts (n=333)	% Nonresident Visiting Other Ski Resorts (n=62)
Bear Paw Ski Bowl	1%	--
Big Sky Resort	26%	24%
Blacktail Mountain	5%	--
Bridger Bowl	22%	18%
Discovery Basin	16%	8%
Great Divide	6%	10%
Lookout	4%	3%
Lost Trail	6%	--
Maverick Mountain	<1%	1%
Montana Snowbowl	9%	7%
Moonlight Basin	8%	8%
Red Lodge Mountain	10%	7%
Showdown Montana	--	--
Turner Mountain	<1%	--
Whitefish Mountain	17%	10%
Will not visit other areas	44%	60%

Resident: Fifty-four percent used the ski area home page as their information source (Table 8.14) followed by 46 percent indicating word of mouth as their information source.

Nonresidents: Word of mouth was the predominate form of information source for nonresidents (72%) followed by 49 percent who used the ski area homepage and 41 percent who used the Internet search engine (Table 8.14).

Table 8.14: Sources of Information Used

	Resident (n=341)	Nonresident (n=61)
None	19%	12%
Word of mouth	46%	72%
Internet search engine	34%	41%
Ski area homepage	54%	49%
Social networking	<1%	5%
On-line consumer review	<1%	--
Video/You Tube/Podcast	1%	--
Blogs, wiki	<1%	2%
MT Planner/wtr guide	<1%	2%
Magazine ad/article	5%	2%
Radio ad	14%	5%
TV ad	12%	2%

Showdown Expenditure Patterns

Resident: Thirty-four percent of residents indicated they had purchased some form of a ski/travel package. Of those who purchased a package, 94 percent indicated it included lift tickets; three percent said in included accommodations; one person indicated it included food/beverage; 41 percent said it included equipment rental; and 45 percent indicated that other products/services were included in their package.

Nonresident: Eight nonresident skiers at Showdown purchased some variety of a travel/ski package ranging from \$40 to \$450. Of the eight who purchased packages, all of them said it included lift tickets; five groups indicated it included equipment rental, and five said that other products/services were included in their package.

Resident: Resident skiers spent nearly the same amount of money on lift tickets as they did on restaurant and bar and gasoline purchases totaling 66 percent of their purchases (Table 8.15). Residents who skied at Showdown during the 09/10 spent \$1.6 million.

Nonresident: Nonresidents spent most of their trip expenditures on accommodations and restaurant/bar followed by lift tickets. Average group expenditures for nonresidents while in Montana were \$619.56 (table 8.15). Nonresidents skiing at Showdown during the 09/10 ski season contributed nearly \$300,000 to the Montana economy.

Table 8.15: Average Expenditures/ski trip by residents and nonresidents

Expenditure Type	Resident	Nonresident
Accommodations	\$16.14	\$136.53
Gas	30.85	90.78
Restaurant, bar	32.19	135.26
Groceries	15.75	42.50
Transport fares	--	--
Auto/RV rental	--	19.05
Retail	12.20	67.01
Lift tickets	33.37	105.13
Permits, entrance fees	--	0.36
Equipment rental	2.56	18.65
Snowmobile/Snowcoach	0.03	--
Guided trip	--	--
Lessons	2.10	2.70
Other services	0.84	1.59
Avg. \$/group/trip	\$146.03	\$619.56

Table 8.16 shows an average expenditure within each category for those people who spent money in that category. This provides a more realistic look at actual costs to the consumer.

Table 8.16: Expenditures per group/ski trip by those who actually spent money in each category

Expenditure Type	Resident	Nonresident
Accommodations	\$123.98	\$438.35
Gas	33.96	106.79
Restaurant, bar	38.17	147.39
Groceries	22.37	64.82
Transport fares	--	--
Auto/RV rental	--	232.44
Retail	80.82	136.26
Lift tickets	68.36	133.61
Permits, entrance fees	--	21.80
Equipment rental	12.00	47.39
Snowmobile/Snowcoach	4.71	--
Guided trip	--	--
Lessons	35.47	41.18
Other services	16.67	24.32

9. Whitefish Mountain

Whitefish Demographics

Resident respondents were 61 percent male and 39 percent female while the nonresidents were 64 percent male and 36 percent female. The average ages of respondents in this study were 40.6 for resident skiers and 43.9 for nonresident skiers.

The range of ages within the skier group varied only slightly between resident and nonresident skiers. The most represented age group for residents was the 25-34 age group while for nonresidents it was the 35-44 age group (Table 9.12).

Table 9.1: Percent of Skier Groups with Various Ages

Age Groups	Resident (n=119)	Nonresident (n=834)
0-5 years old	8%	13%
6-10 years old	20%	18%
11-17 years old	24%	23%
18-24 years old	12%	17%
25-34 years old	29%	27%
35-44 years old	25%	32%
45-54 years old	20%	35%
55-64 years old	11%	16%
65-74 years old	10%	9%
75 and over	2%	2%

Household income levels between resident and nonresident skiers varied significantly. Sixty-two percent of nonresidents indicated household income over \$100,000 while only 25 percent of residents indicated that same high income ranges (Table 9.2).

Table 9.2: Household Income

Household Income	Resident* (n=114)	Nonresident* (n=820)
<\$25,000	9%	2%
\$25,000-\$49,999	10%	6%
\$50,000-\$74,999	25%	11%
\$75,000-\$99,999	31%	19%
\$100,000-\$149,999	19%	24%
\$150,000-\$199,999	2%	23%
\$200,000+	4%	15%

*Numbers may not add to 100% due to rounding.

Whitefish Trip Characteristics

Resident: Forty-two percent of resident skiers spent at least one night away from home during their ski trip to Whitefish. Eleven percent spent one night while 12 percent spent two nights (Table 9.3). The average length of stay for residents at Whitefish was 1.39 nights.

Nonresident: Twenty percent of nonresidents spent seven nights away from home (Table 9.3). However, on average, nonresidents spent 6.21 nights in Montana on this ski trip.

Table 9.3: Nights from Home

Nights away from home	Resident* (n=92)	Nonresident* (n=830)
0	58%	<1%
1	11%	<1%
2	12%	9%
3	7%	12%
4	3%	17%
5	2%	14%
6	--	10%
7	3%	20%
8	2%	3%
9	1%	2%
10 + nights	1%	8%

*Numbers may not add to 100% due to rounding.

Resident: Thirty-nine percent of residents spending a night away from home stayed with a friend or relative while 32 percent stayed overnight in a hotel (Table 9.4).

Nonresident: Nonresidents were equally as likely (25% each) to stay in a rental home/condo or at the home of a friend or relative. This was followed by 19 percent who stayed in a hotel (Table 9.4).

Table 9.4: Types of Accommodations (for those who spent a night)

Accommodation Type	Resident (n=41)	Nonresident (n=819)
Hotel/Motel	32%	19%
My condo	5%	10%
My 2 nd home	10%	8%
Rental home/cabin/condo	5%	25%
B&B	--	1%
Home of friend/relative	39%	25%
Lodge	10%	14%

Resident: On average residents drove 117 miles from home but ranged from 7 to 500 miles (Table 9.5).

Table 9.5: Resident Miles from Home

Miles	% of skiers (n=110)
10 Miles or less	5%
11-25 miles	15%
26-50 miles	21%
51-75 miles	16%
76-100 miles	2%
101-150 miles	8%
Over 150 miles	28%

*Numbers may not add to 100% due to rounding.

Nonresident: More nonresident skiers came from Alberta and Washington than any other state or province (Table 9.6). Nonresidents represented 44 U.S. states (plus D.C.), seven Canadian provinces and nine foreign countries (Australia, UK, Germany, Netherlands, Brazil, China, Denmark, Ireland, and Ukraine).

Table 9.6: Nonresident Place of Residence

From:	% of skier groups (n=840)
Alberta	25%
Washington	14%
Minnesota	6%
Saskatchewan	5%
CA, FL, OR, TX	4%
ND, WI	3%
AL, AK, AZ, AR, CO, CT, DE, GA, HA, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MS, NE, NV, NH, NJ, NY, NC, OH, OK, PA, SC, SD, TN, UT, VA, DC, WY	2% or less
BC, Manitoba, Ont., Quebec, New Foundland	<1% ea.
Australia, UK, Germany, Netherlands, Brazil, China, Denmark, Ireland, Ukraine	<1% ea.

Whitefish Ski Characteristics

Fifty-three percent of resident groups skiing at Whitefish Mountain had at least one person with a season pass. Thirteen percent of the nonresident skier groups at Whitefish had at least one person in their group with a season pass.

Resident: Sixty-nine percent of residents only skied one day on their ski trip (Table 9.7). However, the average number of days skiing/boarding in Montana on this trip was 1.8 days.

Nonresident: While the average number of nights in Montana was 6.21, the average number of days skiing/boarding was 4.11. These extra two days were either for travel or to partake in other activities while in Montana (Table 9.7).

Table 9.7: Number of days Skiing/boarding on this trip

Days	Resident (n=119)	Nonresident (n= 840)
1	69%	8%
2	21%	24%
3	6%	26%
4	<1%	14%
5	2%	13%
6	--	7%
7 +	1%	6%

*Numbers may not add to 100% due to rounding.

Nonresident: Ninety-eight percent were in Montana to ski/board along with vacation (93%) and visiting friends and relatives (35%). The primary purpose, however, showed that 71 percent came mainly to ski/board in Montana (Table 9.8).

Table 9.8: Nonresident purpose of Trip

(n=838)	All purposes*	Primary Purpose
Ski/Snowboard	98%	71%
Vacation	93%	14%
VFR	35%	13%
Other	<1%	<1%
Business	1%	<1%
Passing Through	1%	<1%
Shopping	8%	--

*Respondents could check all that apply

Nonresident: Nonresidents at Whitefish had the most variety in their entry into Montana. Not surprisingly, coming to Montana by train only showed up for skiers to Whitefish (17%). The majority, however, came by auto (49%) followed by air (32%) (Table 9.9).

Table 9.9: Nonresident Transportation into MT

Type of Transportation used	% (n=828)
Air	32%
Auto/Truck/RV	49%
Train	17%
Bus	2%

Resident: Resident skiers were most likely to be skiing with their immediate family (36%) followed by skiing with friends (22%) (Table 9.10). Average group size for resident skiers was 2.05 people.

Nonresident: Thirty-five percent of nonresidents skied at Whitefish with their immediate family, but other group types were almost evenly represented: 16 percent couples; 16 percent friends; and 15 percent family and friends. Average group size for nonresident skiers was 2.58 people.

Table 9.10: Type of Travel Group

Group Type	Resident (n=119)	Nonresidents (n=825)
Self	13%	9%
Couple	12%	16%
Immediate family	36%	35%
Extended family	3%	6%
Family & friends	9%	15%
Friends	22%	16%
Business Associates	--	<1%
Organized Group/club	6%	4%

*Numbers may not add to 100% due to rounding.

Resident/Nonresident: Respondents were asked if they were skiing or boarding today and to identify their ability level in skiing/boarding. Residents were slightly more likely to claim advanced abilities than nonresidents and both groups were more likely to be skiing over snowboarding (Table 9.11).

Table 9.11: Activity Type and Ability Level

	Resident (n=117)	Nonresident (n=827)
Type of Activity		
Skiing	67%	67%
Snowboarding	23%	17%
Both	10%	16%
Ability Level		
Beginner	7%	11%
Intermediate	56%	61%
Advanced	38%	29%

*Numbers may not add to 100% due to rounding.

Whitefish Resort Choice and Information Sources

Resident: Residents chose to ski at Whitefish because of location (85%) followed by reputation (59%) (Table 9.12).

Nonresident: Location was the number one reason for nonresidents to ski at Whitefish (71%) followed by reputation and recommendations from others (44% each). Thirty-two percent indicated price was a reason for skiing at Whitefish (Table 9.12).

Table 9.12: Why visit Whitefish?

	Resident (n=117)	Nonresident (n=801)
Price	17%	32%
Terrain	16%	19%
Location	85%	71%
Recommendation	21%	44%
Short lift lines	9%	9%
Reputation	50%	44%
Own condo/home here	15%	16%
Family friendly	21%	21%

Resident: Twenty-six percent of resident skiers skied at Blacktail in the 09/10 season followed by 13 percent at Big Sky, 12 percent at Discovery, and 10 percent at Lookout (Table 9.13)

Nonresident: Only nine percent of nonresident skiers indicated they skied at other Montana resorts this ski season. Four percent of nonresidents said they skied at Big Sky and Blacktail resorts (Table 9.13).

Table 9.13: Other MT Ski Areas Visited this Ski Season

Other MT Ski Areas	% Resident Visiting Other Ski Resorts (n=117)	% Nonresident Visiting Other Ski Resorts (n=827)
Bear Paw Ski Bowl	--	--
Big Sky Resort	13%	4%
Blacktail Mountain	26%	4%
Bridger Bowl	9%	2%
Discovery Basin	12%	<1%
Great Divide	5%	--
Lookout	10%	2%
Lost Trail	7%	<1%
Maverick Mountain	<1%	--
Montana Snowbowl	5%	<1%
Moonlight Basin	4%	1%
Red Lodge Mountain	9%	1%
Showdown Montana	9%	<1%
Turner Mountain	<1%	1%
Whitefish Mountain	--	--
Will not visit other areas	31%	91%

Resident: Residents were most likely to look at the Whitefish ski resort home page or use the internet search engine to find out information about Whitefish skiing (41% each) (Table 9.14).

Nonresidents: Similarly, nonresidents used the ski area homepage for their information gathering and the Internet search engine (68% each) followed by word of mouth (30%)(Table 9.14).

Table 9.14: Sources of Information Used

	Resident (n=114)	Nonresident (n=826)
None	27%	13%
Word of mouth	33%	30%
Internet search engine	41%	68%
Ski area homepage	41%	68%
Social networking	2%	4%
On-line consumer review	--	2%
Video/You Tube/Podcast	4%	9%
Blogs, wiki	4%	3%
MT Planner/wtr guide	--	2%
Magazine ad/article	1%	3%
Radio ad	2%	--
TV ad	--	<1%

Whitefish Expenditure Patterns

Resident: Five percent of resident visitors to Whitefish Mountain purchased some form of a ski/travel package. Of those who purchased packages, 67 percent said it included lift tickets; 50 percent indicated it included accommodations; 67 percent said it included car rental; 33 percent indicated it included equipment rental; 67 percent indicated that other products/services were included; and one person said it included food/beverage and spa treatments.

Nonresident: Nine percent of Whitefish Mountain skiers purchased some variety of a travel/ski package. Of those who purchased packages, 82 percent included lift tickets; 81 percent had accommodations included; 31 percent had car rental; 19 percent included airline tickets; four percent included spa treatments; 30 percent had food/beverage included; 15 percent included

equipment rental; and 41 percent indicated that other products/services were included in their package.

Resident: Residents skiing at Whitefish spent the most money on lift tickets followed by restaurant/bar and gasoline (Table 9.15). On average resident skiers spent \$188.07 during their ski trip and overall spent \$7.7 million during the 09/10 ski season.

Nonresident: Nonresidents spent more of their trip expenditure on accommodations than any other expenditure followed by lift tickets. Average group expenditures for nonresidents while in Montana were \$1,267.13 (Table 9.15). Nonresidents skiing at Whitefish during the 09/10 ski season directly contributed \$15.4 million to the Montana economy.

Table 9.15: Average Expenditures/ski trip by residents and nonresidents

Expenditure Type	Resident	Nonresident
Accommodations	\$13.34	\$321.57
Gas	36.26	58.39
Restaurant, bar	41.11	238.17
Groceries	18.64	128.80
Transport fares	--	1.23
Auto/RV rental	--	44.49
Retail	7.84	106.39
Lift tickets	58.55	275.61
Permits, entrance fees	0.17	2.19
Equipment rental	4.70	22.43
Snowmobile/Snowcoach	--	4.28
Guided trip	--	5.66
Lessons	4.47	28.91
Other services	2.99	7.01
Avg. \$/group/trip	\$188.07	\$1,267.13

Table 9.16 shows an average expenditure within each category for those people who spent money in that category. This provides a more realistic look at actual costs to the consumer.

Table 9.16: Expenditures per group/ski trip by those who actually spent money in each category

Expenditure Type	Resident	Nonresident
Accommodations	\$99.22	\$ 560.88
Gas	38.18	85.26
Restaurant, bar	50.44	252.56
Groceries	34.13	150.51
Transport fares	--	32.84
Auto/RV rental	--	282.32
Retail	32.17	144.48
Lift tickets	96.77	316.69
Permits, entrance fees	6.58	16.86
Equipment rental	27.99	112.44
Snowmobile/Snowcoach	--	113.84
Guided trip	--	133.39
Lessons	44.36	137.09
Other services	50.75	52.08

SUMMARY AND DISCUSSION

Skier Numbers and Spending

The 2009/2010 Montana ski season ended with its second highest number of skier visits ever at slightly over 1.3 million visits. Of those visits nonresidents represented 35 percent or 475,000 visits. With a nonresident group size of 2.58 this indicates there were 184,123 nonresident groups skiing in Montana this season. Skier visits by residents were slightly over 882,000 representing nearly 367,600 resident ski groups during the 09/10 ski season.

The nonresident ski industry injected \$49,464,000 into the Montana economy. The indirect and induced contributions combined to make an \$83 million economic impact to the state based on approximately four months of skiing. Nonresident skiers support just over 1,000 annual jobs in the state and over \$43 million in employee, proprietor, and other property income.

When looking at the entire ski industry in Montana, residents spent the majority of their money on lift tickets during their ski trip followed by restaurant/bar and gas purchase. The average resident group expenditure per trip was \$140.96. Nonresidents, on the other hand, spent more of their trip expenditure on accommodations than any other expenditure followed closely by lift tickets. Average group expenditures for nonresidents while in Montana were \$1,272.72.

Average spending by skiers differed substantially by resort. Both residents and nonresidents spent the most at Big Sky at \$192/group/trip for residents and \$1,496/group/trip for nonresidents while in Montana. Similarly, the least amount of money spent was at Discovery by both resident and nonresidents.

Residents spent \$84/group/trip while nonresidents spent \$272/group/trip in Montana.

Skier characteristics

While the majority of residents skied only one day on their ski trip, nonresidents skied nearly 5 days on average. Those who drove into Montana spent 78 percent of their time skiing and presumably most of the remaining time was spent traveling. For those flying, there was an extra two and a half days to do other activities while in Montana as they only spent 68 percent of their time skiing. People who took the train spent 69 percent of their time in Montana skiing but they were here the shortest amount of time and therefore had about a day and a half extra in Montana. This suggests that skiers who fly into Montana have more time to spend money beyond the ski resort, resulting in nearby communities receiving economic benefit from the ski areas.

More than half of the nonresident skiers (53%) earn over \$100,000 annually while only twenty percent of resident skiers earn that much each year. This disparity is not new in Montana or in tourism destinations around the world. What is important here is that people of all earnings level are spending their time participating in an activity they both love. The concern comes when residents are priced out of an activity. Skiing is not an inexpensive sport and Montana is lucky to have ski areas with reasonable prices. Interestingly, only at Moonlight was price mentioned as the number one reason to ski by both residents and nonresidents.

Ski area websites are by the far the most used and useful form of information gathering by both residents and nonresidents. While this is not surprising, it does show the importance of having up-to-date websites as well as easy to navigate websites. In addition, Montana ski areas should always strive to have top billing when it

comes to search terms on the web. Both residents and nonresidents would presumably use an internet search engine to find the ski area's homepage. It is imperative to make this easy for the potential customer.

While it differed slightly by resort, it is interesting to note that both residents and nonresidents stated location as the number one reason for visiting a Montana ski area when all resorts are combined in the analysis. For residents, location makes sense. For nonresidents, it also makes sense when the majority of the visitors come from nearby states/provinces (Alberta, Minnesota, Washington and North Dakota). These folks are used to driving in winter conditions and we are close! If they choose to fly from Minnesota or Washington there are usually direct flights. This makes location a logical #1 reason for skiing in Montana.

Skier characteristics and the proportion of nonresident to resident skiers differ by resort. This report weighted the data to be able to represent the statewide skier and numbers. However, to understand what is happening at each resort, it is wise to only look at that resort. Montana has three levels of ski areas:

- **Destination resorts** (Big Sky, Whitefish, and Moonlight)
- **Medium size resorts** (Bridger and Red Lodge)
- **Small local resorts** (Bear Paw Ski Bowl, Blacktail Mountain, Discovery Basin, Great Divide, Lookout, Lost Trail, Maverick Mountain, Montana Snowbowl, Showdown Montana, and Turner Mountain).

When looking at skier characteristics and numbers, comparing the equivalent type of ski area is a must. Therefore, if data was not collected at a particular ski, simply look at the type of resort it represents, then study the skier characteristics from the similar type of resort to get a better understanding of skier characteristics.

Future Research

This study provides an excellent baseline of skier spending and characteristics for Montana. It is not necessary to repeat this study each year since skier characteristics will likely not change much. However, proportions and spending might change, therefore it is recommended that each resort gather proportion counts to determine if the ratio of resident to nonresident skiers changes. In addition, periodic sampling of skier expenditures will allow each resort to trend spending patterns over the years.

2009-10 Montana Skier/Boarder Survey

1. Are you a resident of Montana? No Yes
 No, out of state student
- If MT Resident or out-of-state student,
 1a. How many miles from home did you travel to get here?
- If nonresident,
 1b. What are the purposes of your trip to Montana? (Check all that apply)
 (1) Ski/snowboard (4) Just passing through (7) Other (medical, school)
 (2) Vacation/recreation/pleasure (5) Shopping
 (3) Visit friends/relatives (6) Business/convention
- 1c. Of the above, what is your main purpose for being in Montana?
- 1d. Did you enter Montana by: Auto/Truck/RV Air Train Bus
2. Today, are you... Skiing Snowboarding Both
3. What is your ability level? Beginner Intermediate Advanced
4. Why did you decide to visit this resort? (please check all that apply)
 Price Recommendation from friend Own condo/home here
 Terrain Short lift lines Family friendly
 Location Reputation for good skiing
5. What source(s) of information did you use for this ski trip? (please check all that apply)
 None Social networking (Facebook, etc.) MT Travel Planner
 Word of mouth On-line consumer reviews (i.e. Trip Advisor) Magazine ad/article
 Internet search engine Video, YouTube, podcasts Radio ad
 Ski area homepage blogs, wikis TV ad
6. What other ski areas will/did you visit in Montana this ski season?
 Big Sky Redlodge Lost Trail Maverick
 Moonlight Discovery Blacktail Turner
 Bridger Showdown Great Divide Snowbowl
 Whitefish Lookout Bear Paw Ski Bowl None
7. Which category best describes your ski travel group? (please check only one)
 Self Immediate family Family and friends Business associates
 Couple Extended family Friends Organized group/club
8. How many total nights are you staying away from home but in Montana on this trip?
- 8a. If overnight, what types of accommodations will you be staying at in Montana?
 Hotel/motel My 2nd home B&B Lodge
 My condo Rental home/cabin/condo Home of friend/relative
9. How many days will you be skiing/boarding in Montana on this trip?
10. We are assessing the economic contribution of skiing to Montana's economy so when I ask you about expenditures, how many people will these expenditures represent?
11. How many of this group are season pass holders?

12. Did you purchase a travel package? (if yes, put \$ amount)

12a. Package included:

- Lift tickets
 Car rental
 Spa
 Equipment rental
 Accommodations
 Flight
 Food/beverage
 Other

Think about all your group travel expenses while in Montana for this trip. How much will you spend:

- Overnight accommodations \$
- Gasoline, oil \$
- Restaurant, bar (including tips) \$
- Groceries, snacks \$
- MT Transportation fares (e.g. shuttles, taxis) \$
- Auto/RV rental, repair \$
- Retail goods (e.g. souvenirs, gifts, etc.) \$
- Lift tickets \$
- Permits, entrance fees \$
- Equipment rental \$
- Snowmobile/snowcoach rental \$
- Guided trip (e.g. dog sled, snowmobile)inc. tips \$
- Lessons (including tips) \$
- Other services (spa, daycare, etc.) \$

13. What age groups are represented in your travel group? (please check all that apply)

- 0-5
 11-17
 25-34
 45-54
 65-74
 6-10
 18-24
 35-44
 55-64
 75 and over

14. In what US state, Canadian province or foreign country do you permanently reside?

14a. What is your zip or postal code?

15. What is your age?

16. What is your gender?
 Male Female

17. What best describes your annual household income in US dollars? (please check only one)

- Less than \$25,000
 \$50,000 to less than \$75,000
 \$100,000 to less than \$150,000
 \$200,000 or greater
 \$25,000 to less than \$50,000
 \$75,000 to less than \$100,000
 \$150,000 to less than \$200,000

Date

Ski resort