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Economics and Characteristics of Alpine Skiing in Montana - 2018-2019 Ski Season

Jeremy L. Sage

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Economics and Characteristics of Alpine Skiing in MT

2018-2019 Ski Season

Jeremy L. Sage

8/19/2019

This study is a follow-up to a ski industry study conducted by ITRR during the 2009-2010 ski season. Skiers and snowboarders at 6 ski areas were surveyed throughout the season to collect information on skier characteristics and spending.

Economics and Characteristics of Alpine Skiing in MT

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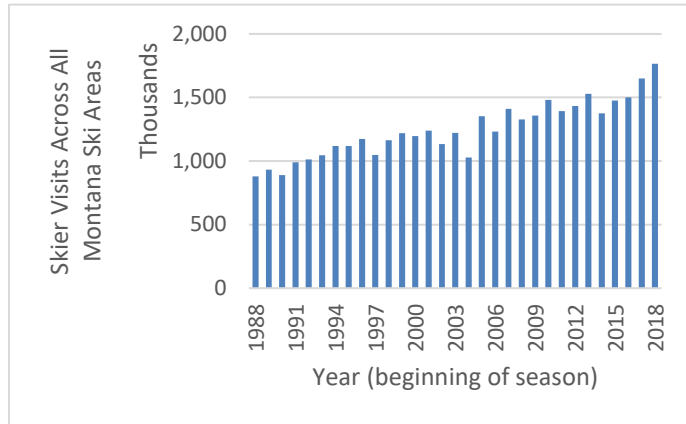
Abstract

Skier visits to Montana ski areas have seen year over year growth for the past four years and a generally positive trajectory for at least the past 30 years. This study surveyed skiers and snowboarders at 6 of Montana's ski areas to collect information on skier demographics, characteristics, and spending behaviors. Montana ski areas as a whole are seeing increasing proportions of nonresident skiers. These skiers generated nearly \$177 million in economic contribution and 1,970 jobs in the 2018/19 season.

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Executive Summary

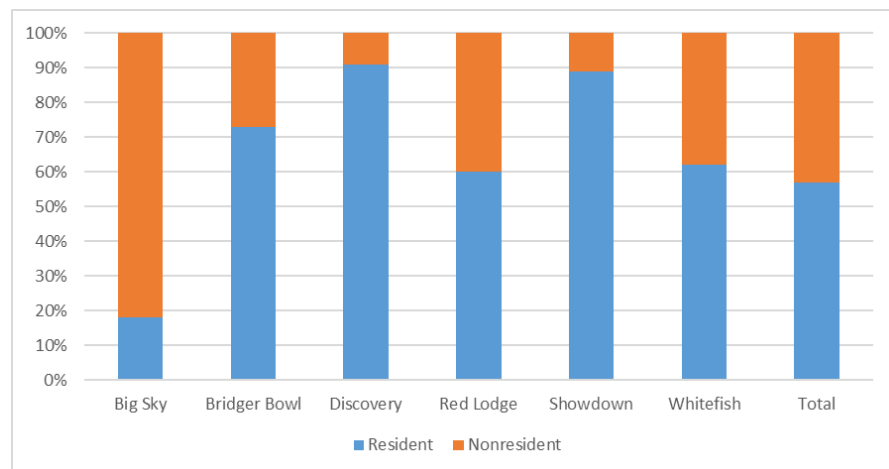
Skier visits to Montana ski areas have seen year over year growth for the last 4 straight years and a generally positive trajectory for at least the past 30 years. Nationwide, the 2018/19 season witnessed an 11% increase over the 2017/18 season, amassing 59 million skier visits. Though Montana’s change of 7% between the 2 years is smaller, Montana had a stronger 2017/18 season than did most other areas. As the ski



industry in the state continues to grow, it becomes increasingly important to be able to capture who these visitors are, as well as their travel behaviors and spending patterns such that the ski areas and their supporting communities can best support the industry and continue to sustainably grow.

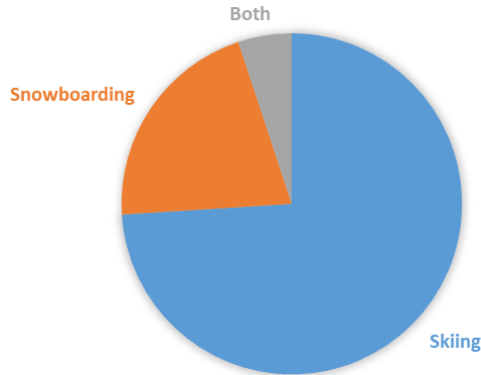
This study surveyed skiers and snowboarders throughout the 2018/19 season at six of Montana’s ski areas – across a range of ski resort sizes -- to collect information on skier demographics, characteristics, and spending behaviors.

43% of all Montana ski area visits were from nonresident skiers and snowboarders.



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What are you participating in today?



Nearly three quarters of those surveyed identified themselves as skiers. 1-in-5 were snowboarding. More than 80% of both skiers and snowboarders identified as at least intermediate ability.

Why did you decide to visit this resort?
(All reasons)

	Residents	Nonresidents
Terrain	46%	47%
Location	62%	47%
Reputation for good skiing	26%	46%
Good snow	40%	37%
Recommendation from a friend	4%	33%
Short lift lines	18%	19%
Family friendly	12%	16%
Price	4%	12%
Ease of access	8%	8%
Own condo/home here	14%	7%
Auxiliary activities	2%	2%

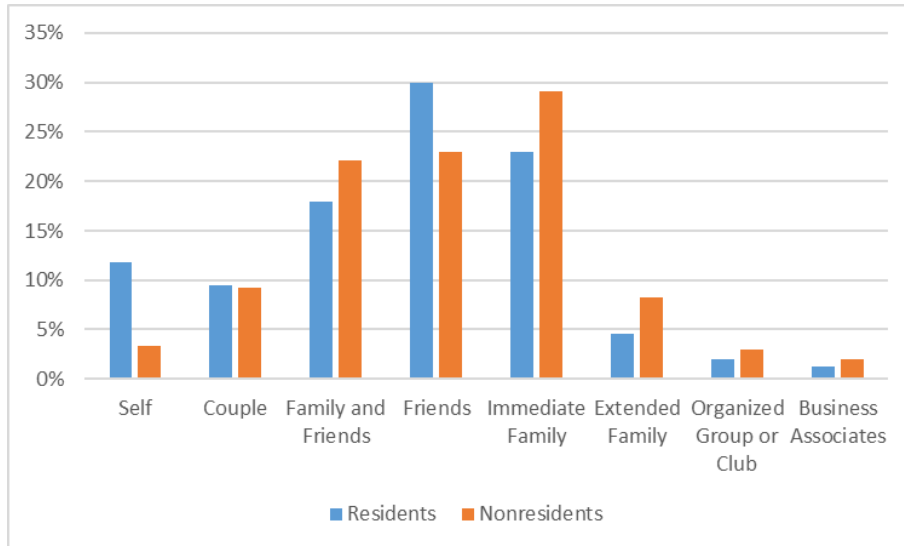
For both residents and nonresidents alike, location is a dominant consideration in ski area choice. The locations terrain, snow quality, and reputation are also major factors of consideration for all skiers/snowboarders.

Top 5 Information Sources

	Residents	Nonresidents
1	None - 40%	Ski Area's Website - 53%
2	Ski Area's Website - 38%	Word of Mouth - 53%
3	Word of Mouth - 27%	Search Engine - 21%
4	Ski Conditions Website - 12%	Ski Conditions Website - 16%
5	Social Media - 8%	None - 13%

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Friends or family groups are most prevalent among travel group types



Group spending per trip

Expenditure Type	Residents	Nonresidents
Accommodations	\$ 41.85	\$ 563.73
Gas	\$ 29.94	\$ 69.94
Restaurant, Bar	\$ 64.87	\$ 289.57
Groceries	\$ 24.55	\$ 131.18
Transportation Fares	\$ 0.35	\$ 4.26
Auto/RV Rental	\$ 2.92	\$ 31.62
Retail Sales	\$ 12.62	\$ 61.88
Lift Tickets	\$ 86.70	\$ 351.53
Permits, Entrance Fees	\$ 0.81	\$ 3.39
Equipment Rental	\$ 10.79	\$ 46.39
Snowmobile/Snowcoach	\$ 1.84	\$ 9.21
Guided Trip	\$ 1.00	\$ 11.12
Lessons	\$ 8.41	\$ 15.25
Other Services	\$ 1.44	\$ 6.94
Total	\$ 288.09	\$ 1,596.01

In the 2018/2019 ski season, ski areas hosted 1.77 million skier visits, with residents representing 57% of those visits and nonresidents the remaining 43%. Residents throughout the 18/19 season spent \$288.09 per group per trip, while nonresidents spent \$1,596.01 per group per trip. The interaction of increased total skier visits, increased proportion of nonresidents, and the increased average group spending yielded a total economic impact of \$175,848,000; an 81% increase over the 09/10 season.

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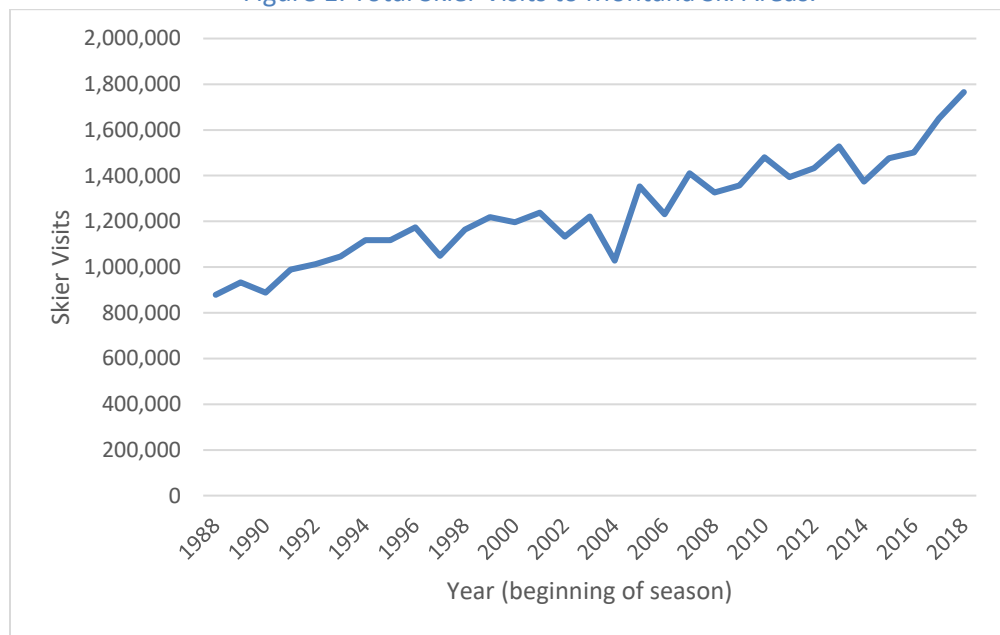
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Introduction

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 2018/19 ski season.

In the last 30 years, the number of skier visits to Montana ski areas has doubled. Though there have been dips and valleys, the general trajectory has been positive (Figure 1). Montana ski areas have seen four straight years of increasing skier numbers – the first such stretch since 1991-1996. Nationwide, the 2018/19 season witnessed an 11% increase over the 2017/18 season, amassing 59 million skier visits. Though Montana’s change of 7% between the two years is smaller, Montana had a stronger 2017/18 season than did most other areas. The continued growth of the ski industry in Montana offers an opportunity to expand Montana’s image as a broader destination than summertime access to National Parks.

Figure 1. Total Skier Visits to Montana Ski Areas.



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:

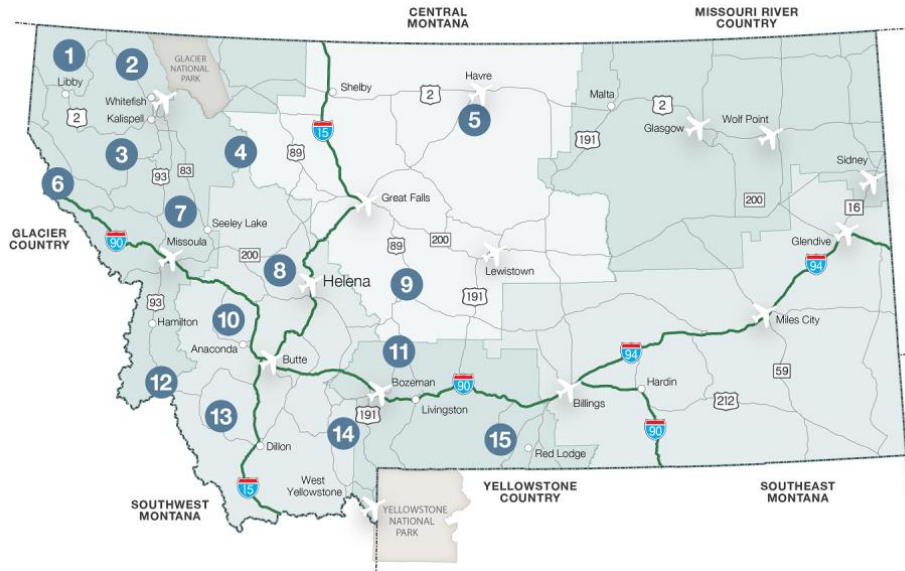
Objectives:

- 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.

Methods

Six of the 15 ski areas of Montana were selected for surveying efforts during the 2018-19 ski season (* in list below). The six areas were selected such that a cross section of ski area size was represented.

Figure 2. Ski Areas and Resorts of Montana.¹



- | | |
|--|--------------------------------|
| 1. Turner Mountain | 9. Showdown Montana* |
| 2. Whitefish Mountain Resort* | 10. Discovery Ski Area* |
| 3. Blacktail Mountain | 11. Bridger Bowl Ski Area* |
| 4. Teton Pass (Not open in 18/19 season) | 12. Lost Trail Powder Mountain |
| 5. Bear Paw Ski Bowl | 13. Maverick Mountain |
| 6. Lookout Pass Ski/Rec Area | 14. Big Ski Resort* |
| 7. Montana Snowbowl | 15. Red Lodge Mountain* |
| 8. Great Divide | |

Survey design

Researchers at the Institute for Tourism and Recreation Research (ITRR) along with members of the MSAA met during the summer of 2018 to determine the type and approximate number of questions for the survey. Initial questions were generated from the 2009-2010 Montana ski industry study, also conducted by ITRR. The collaborative discussions allowed for refinement of the questions into the final survey (Appendix A). The survey was designed to be delivered via off-line tablet on the iForm survey platform. At the end of each survey period, surveyors uploaded all surveys. This method eliminated the expense required to manually enter paper based surveys.

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. Each surveyor was initially assigned 16 days in which to survey, comprising of 4 days per month for 4 months (December-March). The days were varied to ensure coverage across weekdays and weekends, and effort was made to survey during holiday weekends. A typical survey day would last from a half hour before the first chair, to a half hour after the last chair.

¹ Map obtained from VisitMT: <https://www.visitmt.com/places-to-go/ski-areas-and-resorts.html>

Limitations

As with all outdoor recreation activities, downhill skiing and snowboarding is dependent upon weather conditions. Several extreme cold snaps, particularly in February, reduced visitation to several ski areas making it difficult to achieve a solid volume of surveys on such days. Similar observations occurred on days in which a lift was not properly functioning.

Response Rate, Sample Size, and Weighting

Surveyors were to record the number of refusals to participate each day. If an approached skier/snowboarder declined the invitation to participate, the surveyor asked if they could know whether the individual was a resident or not. Where the skier affirmed their residency status, this was considered a 'soft refusal' and residency was recorded and annotated in the survey as a refusal. A 'hard refusal' was noted where the skier/snowboarder would not indicate residency.

In total, 13% of invited participants refused to complete the survey, yielding a response rate of 87%. All refusals were soft refusals, allowing identification of residency status. Montana residents refused to participate at a rate of 12%, while nonresidents did so at a rate of 15%. Because of the high response rate, it is believed that the completed surveys represent all skiers in Montana.

Sample size varied across ski areas, with highs of nearly 500 surveys at each of Big Sky and Bridger Bowl, and a low of 63 at Discovery (Table 1). The low volume recorded at Discovery is due in part to two survey days in which skier volume was very low and those skiers that were present largely left by midday due to weather conditions. More significant in the low volume are three days of data being lost due to download malfunctions from the tablets; likely caused by operator error. Whitefish survey counts are also lower than anticipated due to missed survey days and closures unable to be rescheduled with the surveyor.

Table 1. Survey Sample Size.

Ski Area	Resident Sample	Nonresident Sample	Total Sample
Big Sky	101	393	494
Bridger Bowl	321	166	487
Discovery	53	10	63
Red Lodge	148	102	250
Showdown	374	29	403
Whitefish	147	113	260
Total	1,144	813	1,957

To enable the skier sample data to represent the full skier numbers, the sample was weighted. For example, ski numbers at Bridger Bowl represent 20% of all skiers at the 6 resorts, but represented 25% of the respondents in the sample. This required that a weight be applied to the sample size so it was effectively 'reduced' by 5%. 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. Surveyors were instructed to collect residency status of each skier getting on the lift over the course of 15 minutes. Fifteen

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minutes was selected so as to provide a long enough period to get a suitable sample, yet not too long as to begin counting skiers returning for a second run. Lifts with fast or short times from bottom to top were reduced to a ten minute count after surveyors noted skiers returning prior to count completion.

Results

Unless specifically noted separately, when “skier” is referenced, it represents both skiers and snowboarders.

Residency

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. Red Lodge and Whitefish were nearly identical in their proportions at approximately a 60:40 split, residents to nonresidents. Approximately 3/4 of Bridger skiers were identified as residents. Finally, skiers at both Showdown and Discovery were approximately 90% residents. Ski areas not included in the survey sampling (Shown in Figure 1) are assigned the average of Showdown and Discovery proportion counts for the purpose of estimating total economic impact of the ski industry in Montana (Table 2).

Table 2. Resident to Nonresident Proportions by Ski Area.

2018-19		
Ski Area	Resident Proportion	Nonresident Proportion
Big Sky	18%	82%
Bridger Bowl	73%	27%
Discovery	91%	9%
Red Lodge	60%	40%
Showdown	89%	11%
Whitefish	62%	38%
Total	57%	43%

Statewide Skier and Trip Characteristics

Demographics

Resident respondents were 62% male and 38% female while the nonresidents were 56% male and 44% female. The average age of respondents in this study was 39.2 for resident skiers and 41.1 for nonresident skiers, based on talking to only people 18 years and older.

The range of ages within the skier group varied slightly between resident and nonresident skiers (Table 3). The 25-34 age range had the highest representation for both residents and nonresidents. On par with the younger group, were the 35-44 year old residents.

Table 3. Age Groups Represented within Respondent's Ski Group.

Age Groups	Residents (n=636)	Nonresidents (n=779)
0-5 years old	10%	8%
6-10 years old	18%	14%
11-17 years old	17%	24%
18-24 years old	22%	30%
25-34 years old	37%	40%
35-44 years old	37%	31%
45-54 years old	26%	39%
55-64 years old	13%	29%
65-74 years old	7%	15%
75 and over	1%	3%

Household income levels between resident and nonresident skiers varied significantly. Not surprisingly, residents have a much lower household income than nonresidents (Table 4). While 49% of nonresidents had household incomes over \$150,000, only 17% of resident skiers fell into that income category. This nonresident observation is an 18% increase of this income bracket over the 2009-10 survey and is largely driven by nonresidents to Big Sky.

Table 4. Household Income.

Household Income	Resident (n=744)	Nonresident (n=864)
<\$25,000	12%	4%
\$25,000 to \$49,999	17%	6%
\$50,000 to \$74,999	20%	11%
\$75,000 to \$99,999	18%	12%
\$100,000 to \$149,000	17%	19%
\$150,000 to \$199,000	7%	15%
>\$200,000	10%	34%

Trip Characteristics

Eighty percent of resident skiers did not spend a night away from home while 4% spent 1 night, and 7% spent 2 nights away from home. The average number of nights away from home was 0.79. On average, nonresidents spent 6 nights in Montana on this ski trip. Four nights were the most common for nonresidents (Table 5).

Table 5. Distribution of Number of Nights Spent Away from Home.

Nights Away From Home	Resident	Nonresident
	(n=740)	(n=939)
0	80%	3%
1	4%	1%
2	7%	8%
3	5%	14%
4	1%	20%
5	2%	17%
6	0%	13%
7	0%	10%
8	0%	4%
9	0%	1%
>10	1%	10%

Note: Delimited to 30 nights

Residents who spent a night were most likely to spend a night in a motel (31%) followed by the home of a friend or relative (27%). Nonresident skiers were most likely to stay overnight in a rental home, condo, or cabin (34%) followed by 22% who stayed in a hotel/motel (Table 6).

Table 6. Accommodation Type.

Accommodation	Residents (n=137)	Nonresidents (n=867)
Hotel/Motel	31%	22%
Rented a room in a home/condo/cabin	6%	8%
My condo	12%	8%
Home of a friend or relative	27%	20%
Rental home/condo/cabin	21%	34%
My 2nd home	4%	4%
Ski resort lodge	7%	13%
Bed & Breakfast	2%	1%

Note: Columns do not add up to 100%. Respondents could select multiple accommodations.

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On average, residents drove 55 miles from home, and ranged from less than 10 miles to 600 miles from home (Table 7).

Table 7. Distance Traveled to Resort by Residents.

Miles	Proportion of Skiers (n=886)
10 miles or less	19%
11-25 miles	32%
26-50 miles	14%
51-75 miles	17%
76-100 miles	6%
More than 100 miles	12%

Residents from California (9.6%) arrived at Montana ski areas more often than any other state or province. Californians were followed respectively by residents of Minnesota (8.6%) and Washington (6.4%). Nonresidents represented nearly all U.S. states (plus D.C.), and provinces across Canada. Eight other countries were also represented in the survey sample, led by Australia at 1% of the total sample (Table 8).

Table 8. Nonresident State, Province, or Country of Residence.

State, Province, Country of Residency	Proportion of Skiers (n=907)
California	9.6%
Minnesota	8.6%
Washington	6.4%
North Dakota	5.4%
Alberta	4.8%
Colorado	4.7%
New York	4.5%
Florida	4.3%
Texas	4.2%
WY, ID, WI, MI, GA, OH, PA	2-3% each
MA, IL, UT, VA, AL, TN, BC, NC, SD, IN, NH, VT, SK, MD, NJ, OR, AZ, CT, SC, AK, HI, NV, DC, MO, NE, MS, ON, AR, LA, OK, DE, IA, KY, QB, MB, NM	<2% each
Other Countries: Australia, United Kingdom, South Africa, New Zealand, Germany, China, Chile, Netherlands	<1% each

When asked about the purposes for their trip to Montana, 85% of nonresidents said to ski or snowboard along with vacation (50%) and visiting friends and family (25%). The primary purpose, however, showed that 72% came mainly to ski and snowboard in Montana (Table 9).

Table 9. Purpose of Trip to Montana.

Purpose:	All Purposes (n=882)	Primary Purpose (n=1,064)
Ski/Snowboard	85%	72%
Vacation/Recreation/Pleasure	50%	13%
Visiting friends/family	25%	11%
Just passing through	1%	0%
Shopping	3%	0%
Business or convention	4%	2%
Other	3%	2%

Skier Characteristics

Nearly 3/4 of all respondents, whether resident or nonresident, indicated they were at the ski area to ski, while 1 in 5 were snowboarding, and a small proportion did both (Table 10).

Table 10. Respondents' Primary Activity.

Primary Activity of Respondent	Residents (n=889)	Nonresidents (n=1005)
Skiing	74%	73%
Snowboarding	21%	20%
Both	5%	6%

Whether skiing or snowboarding, residents were more likely to indicate advanced level skills compared to nonresidents (Table 11).

Table 11. Skier and Snowboarder Ability Levels.

	Residents (n=693)	Nonresidents (n=788)
Skiing		
Beginner	7%	10%
Intermediate	32%	42%
Advanced	61%	48%
Snowboarding	(n=233)	(n=253)
Beginner	8%	9%
Intermediate	30%	45%
Advanced	62%	46%

The average days skiing/boarding by residents on their current trip was 3.27; however, the median days was only 1. The difference in mean and median is largely driven by the 15% of residents indicating they spent more than 7 days skiing on this trip. The mean is likely skewed upward due to a sizable group of residents indicating a large number of days skiing on this trip. It appears that many of these individuals own a second home or condo in the area where they are skiing and indicated the length of time they will be spending at this home.

For nonresidents, the average number of nights in Montana was 6.00 (median = 2), while the average number of days skiing/boarding was 4.08. 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 12).

Table 12. Days Spent Skiing on This Trip.

Days	Resident (n=725)	Nonresident (n=937)
1	58%	15%
2	12%	23%
3	4%	16%
4	1%	9%
5	3%	3%
6	0%	1%
7+	15%	10%

Nonresidents were more likely to arrive in Montana via air than private auto while another 1% entered the state by train (Table 13).

Table 13. Mode of Entry into Montana.

Mode of Entry	Proportion of Nonresidents (n=1025)
Car or Truck	37%
Air	61%
Train	1%
Bus	0%

Average group size for resident skiers was 2.8 people. Resident skiers were most likely to be skiing with friends compared to any other group type followed by skiing with their immediate family (Table 14).

Average group size for nonresident skiers was 4.4 people. Nearly 1/3 (29%) of all nonresident skiers were traveling with their immediate family compared to the next group types of 'friends' and 'friends and family' at 23% and 22% respectively (Table 14).

Table 14. Group Type.

Group Type	Residents (n=815)	Nonresidents (n=936)
Self	12%	3%
Couple	9%	9%
Family and Friends	18%	22%
Friends	30%	23%
Immediate Family	23%	29%
Extended Family	5%	8%
Organized Group or Club	2%	3%
Business Associates	1%	2%

Resort Choice and Information Sources

Nearly 3/4 of residents (73%) listed location as one of the reasons for visiting the ski area in which they were intercepted (Table 15). More often than not (51%), residents identified location as their main reason. Though nonresidents are more

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diverse in their reasons, location still factored in substantially. Other prominent nonresident reasons for visiting the ski area were recommendations from friends, reputation, terrain, and snow quality.

Table 15. Reason for Ski Area Choice.

Reason(s) for Visiting	Residents		Nonresidents	
	All Reasons (n=713)	Main Reason (n=860)	All Reasons (n=657)	Main Reason (n=796)
Location	73%	51%	52%	25%
Recommendation from a Friend	7%	3%	33%	19%
Reputation for Good Skiing	28%	5%	43%	17%
Terrain	36%	9%	40%	13%
Price	34%	8%	26%	7%
Good Snow	43%	8%	38%	7%
Family Friendly	25%	5%	21%	6%
Short Lift Lines	20%	1%	21%	4%
Ease of Access	28%	8%	13%	2%
Auxiliary Activities	2%	1%	2%	0%
Own a Condo/Home Here	17%	0%	9%	0%

If Montana residents utilize any resources at all in making their skiing plans, it was using the ski area’s website (38%). Forty percent of residents indicated no sources at all. Similar to influences on resort choice (recommendations and reputation), nonresidents were most likely to indicate word of mouth as an information source, followed closely by the ski area’s website (Table 16).

Table 16. Information Sources Used.

Information Source(s)	Resident (n=685)	Nonresident (n=821)
Word of Mouth	27%	53%
Ski Area's Website	38%	53%
Search Engine (e.g. Google)	5%	21%
Ski Conditions Website (e.g. On The Snow)	12%	16%
None	40%	13%
Social Media (e.g. Facebook, Instagram)	8%	7%
Visit MT Website	2%	4%
Other Web Pages	1%	5%
Magazine Ad or Article	1%	3%
Travel or Other Blogs	0%	3%
Online Consumer Reviews (e.g. TripAdvisor)	0%	2%
Video, YouTube, Podcasts	0%	1%
Radio Ad	0%	1%
TV Ad	0%	0%

Statewide Spending and Economic Impact

Three percent of resident skiers indicated they had purchased some form of ski package. These packages cost on average \$1,015. Of those who purchased packages, 71% said it included lift tickets; 13% had accommodations included; 31% included equipment rental; and 18% 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 accommodation purchases. The average resident group expenditure per trip was \$288.09 (Table 17).

Eleven percent of nonresident skiers purchased some variety of a travel/ski package at an average price of \$3,812². Of those who purchased packages, 43% included lift tickets; 37% had food/beverage included; 28% had accommodations included; 13% had equipment rentals; 7% included airline tickets; and 1% indicated that car rentals were included in their package.

Nonresidents spent more of their trip expenditures on accommodations than any other expenditure, followed by lift tickets and then restaurant/bar. Average group expenditures for nonresidents while in Montana were \$1,596.01 (Table 17).

Table 17. Average Group Expenditures per Trip.

Expenditure Type	Residents (n=726)	Nonresidents (n=893)
Accommodations	\$ 41.85	\$ 563.73
Gas	\$ 29.94	\$ 69.94
Restaurant, Bar	\$ 64.87	\$ 289.57
Groceries	\$ 24.55	\$ 131.18
Transportation Fares	\$ 0.35	\$ 4.26
Auto/RV Rental	\$ 2.92	\$ 31.62
Retail Sales	\$ 12.62	\$ 61.88
Lift Tickets	\$ 86.70	\$ 351.53
Permits, Entrance Fees	\$ 0.81	\$ 3.39
Equipment Rental	\$ 10.79	\$ 46.39
Snowmobile/Snowcoach	\$ 1.84	\$ 9.21
Guided Trip	\$ 1.00	\$ 11.12
Lessons	\$ 8.41	\$ 15.25
Other Services	\$ 1.44	\$ 6.94
Total	\$ 288.09	\$ 1,596.01

Averages become confusing when some people don't spend money in a category but are included in the total number; therefore, Table 18 shows an average expenditure within each category for those people who spent money in that category.

² The average is susceptible to outliers on the high end of spending. Reported averages are delimited to minimize this effect. Upper bounds were placed on values in excess of 3 standard deviations above the mean. The median price of purchased packages was \$1,500.

Table 18. Group Expenditures by those Who Spent in Each Category.

Expenditure Type	Residents	Nonresidents
Accommodations	\$ 398.12	\$ 837.32
Gas	\$ 39.81	\$ 110.33
Restaurant, Bar	\$ 86.87	\$ 336.13
Groceries	\$ 52.50	\$ 172.72
Transportation Fares	\$ 15.32	\$ 24.35
Auto/RV Rental	\$ 81.89	\$ 154.30
Retail Sales	\$ 98.38	\$ 131.81
Lift Tickets	\$ 209.33	\$ 502.22
Permits, Entrance Fees	\$ 36.03	\$ 61.16
Equipment Rental	\$ 75.80	\$ 145.56
Snowmobile/Snowcoach	\$ 75.21	\$ 187.77
Guided Trip	\$ 59.34	\$ 199.21
Lessons	\$ 87.01	\$ 101.60
Other Services	\$ 49.21	\$ 75.07

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 18/19 ski season at all Montana ski areas (Figure 1) and subtracting out the number of resident skiers (based on proportion counts (Table 2)), yielding 1 million skier visits. Total spending values have been calibrated using total lift ticket sales reported from 5 of the 6 surveyed ski areas. Finally, total spending is then applied to an input/output model using IMPLAN to generate economic impact numbers.³

The \$116.1 million in estimated nonresident visitor spending generated a direct economic impact of \$105.3 million, and a total impact of \$176.8 million and 1,970 jobs (Table 19).

³ 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.

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Table 19. Economic Impact of the Ski Industry in Montana.

	Direct Effect ⁴	Indirect Effect	Induced Effect	Total Effect
Industry Output	\$ 105,297,000	\$ 36,185,000	\$ 35,366,000	\$ 176,848,000
Employment (# of jobs)	1,410	270	290	1,970
Employee Compensation	\$ 32,249,000	\$ 8,564,000	\$ 9,435,000	\$ 50,248,000
Proprietor Income	\$ 2,948,000	\$ 1,802,000	\$ 1,535,000	\$ 6,285,000
Other Property Type Income	\$ 17,211,000	\$ 6,045,000	\$ 6,457,000	\$ 29,713,000
State & Local Taxes				\$ 8,025,000

It is important to note that the impact shown in Table 19 is not for an entire year. Ski areas open all year (e.g., for summer based activities) would provide an additional impact to the state not represented here.

⁴ **Direct Effects** result from nonresident skier purchases of goods and services; **Indirect Effects** result from purchases made by travel-related businesses; and **Induced Effects** result from purchases by those employed in travel-related occupations. **Industry Output** is the value of goods & services produced by an industry which nonresident skiers purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

Skier Characteristics by Ski Area

The following sections of this report provide skier information by participating ski resort in alphabetical order:

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

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.

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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 101, and the nonresident sample size was 393.

Demographics

Resident respondents were 64% male and 36% female while the nonresidents were 54% male and 46% female. The average age of respondents in this study was 40.2 years for resident skiers and 41.8 years for nonresident skiers.

The range of ages within the skier group varied slightly between resident and nonresident skiers. The 45-54 year old group dominated the resident skiers, while that same group and the younger 25-34 year olds were also equally prevalent among the nonresidents (Table 20).

Table 21. Household Income.

Household Income	Residents (n=88)	Nonresidents (n=326)
<\$25,000	13%	3%
\$25,000 to \$49,999	16%	4%
\$50,000 to \$74,999	19%	9%
\$75,000 to \$99,999	15%	9%
\$100,000 to \$149,000	17%	14%
\$150,000 to \$199,000	9%	16%
>\$200,000	11%	45%

Trip Characteristics

Sixty percent of resident ski groups did not spend a night away from home. Those who did were most likely to spend 3 or fewer nights away, for an average of 1.53 nights. Residents were most likely to say they spent one day skiing on this trip. Nonresidents spent an average of 5.87 nights away from home, with the most frequent length being 4-5 nights. They spent 4.5 days skiing while on this trip (Table 22).

Table 20. Percent of Skiers with Various Ages.

Age Groups	Residents (n=45)	Nonresidents (n=282)
0-5 years old	7%	7%
6-10 years old	13%	15%
11-17 years old	29%	25%
18-24 years old	33%	30%
25-34 years old	22%	41%
35-44 years old	33%	26%
45-54 years old	38%	41%
55-64 years old	18%	29%
65-74 years old	13%	13%
75 and over	2%	3%

Household incomes of respondents varied significantly between residents and nonresidents. Nonresident skiers tended towards the higher income brackets, while residents were more evenly distributed across ranges (Table 21).

Table 22. Nights Away from Home.

Nights Away From Home	Residents (n=70)	Nonresidents (n=348)
0	60%	1%
1	9%	0%
2	10%	7%
3	11%	16%
4	1%	20%
5	3%	18%
6	3%	15%
7	1%	9%
8	0%	3%
9	0%	2%
>10	1%	9%

Table 23. Skier Lodging.

Accommodation	Residents (n=26)	Nonresidents (n=324)
Rental home/condo/cabin	19%	40%
Ski resort lodge	23%	20%
Home of a friend or relative	23%	17%
Hotel/Motel	15%	15%
My condo	19%	9%
Rented a room in a home/condo/cabin	8%	7%
My 2nd home	0%	2%
Bed & Breakfast	0%	1%

Of those residents who spent nights away from home, nearly a quarter indicated they stayed at a home of family or a friend. Almost 1-in-5 stayed at their condo and a similarly sized group stayed in a rental home or condo. Nonresidents were most likely to stay in a rental home or condo, followed by the lodge (Table 23).

Sixty-two percent of resident skiers arrived at Big Sky from between 26-75 miles away (Table 24).

Table 24. Resident Miles from Home.

Miles	Proportion of Skiers (n=101)
10 miles or less	13%
11-25 miles	2%
26-50 miles	26%
51-75 miles	36%
76-100 miles	3%
More than 100 miles	21%

Table 25. Nonresident State, Province, or Country of Origin.

State, Province, or Country	Proportion of Skiers (n=338)
CA	9%
NY	8%
MN	7%
CO	6%
WA	6%
FL	4%
TX	4%
GA,WY,IL,OH	3%
ND,ID,MA,MI,PA,TN, UT,NH,VT,WI, Australia	2%
AL,MD,NC,NJ	1%
<1% not reported	

A large number of states are represented by nonresident visitors to Big Sky, led by California and New York (Table 25).

Ski Characteristics

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

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Table 26. Primary Purpose for being in Montana.

	All Purposes (n=418)	Primary Purpose
Skiing/Snowboarding	91%	79%
Vacation, Recreation, Pleasure	50%	11%
Visit Friends and Relatives	19%	7%
Just Passing Through	1%	0%
Shopping	1%	0%
Business	4%	2%
Other	2%	1%

Nonresidents were far and away most likely to indicate that skiing was their primary reason for being in Montana (Table 26).

Table 27. Skier Group Types.

Group Type	Residents (n=77)	Nonresidents (n=347)
Friends	36%	29%
Immediate Family	19%	28%
Family and Friends	13%	19%
Couple	13%	9%
Extended Family	5%	7%
Self	6%	3%
Organized Group or Club	5%	3%
Business Associates	1%	2%

Resident skiers at Big Sky were most likely to be skiing with friends, while nonresidents were equally likely to be with friends or immediate family (Table 27).

Three out of four nonresidents skiing at Big Sky arrived in Montana via air travel (Table 28).

Table 28. Mode of Travel to Montana.

Mode of Entry	Proportion of Nonresidents (n=385)
Air	74%
Car or Truck	26%
Train	0%
Bus	0%

Table 29. Primary Activity.

Primary Activity of Respondent	Residents (n=98)	Nonresidents (n=378)
Skiing	77%	75%
Snowboarding	20%	22%
Both	3%	3%

Three out of four nonresident and resident respondents at Big Sky indicated they were there skiing (Table 29).

Table 30. Skier and Snowboarder Ability Levels.

Ability Level	Residents	Nonresidents
Skiing	(n=75)	(n=293)
Beginner	7%	6%
Intermediate	27%	38%
Advanced	67%	56%
Snowboarding	(n=23)	(n=91)
Beginner	9%	5%
Intermediate	22%	45%
Advanced	70%	49%

Both skiers and snowboarders, whether resident or nonresident, were most likely to identify themselves as advanced in their sport (Table 30).

Resort Choice and Information Sources

Table 31. Reasons for Visiting Big Sky.

Reason(s) for Visiting	Residents		Nonresidents	
	All Reasons	Main Reason	All Reasons	Main Reason
	(n=50)	(n=45)	(n=303)	(n=277)
Reputation for good skiing	26%	9%	46%	25%
Location	62%	51%	47%	19%
Recommendation from a friend	4%	2%	33%	19%
Terrain	46%	27%	47%	17%
Good snow	40%	4%	37%	6%
Short lift lines	18%	4%	19%	5%
Family friendly	12%	0%	16%	5%
Price	4%	0%	12%	2%
Auxiliary activities	2%	0%	2%	1%
Ease of access	8%	2%	8%	1%
Own condo/home here	14%	0%	7%	0%

Location dominates residents' main reasons for skiing at Big Sky. Nonresident visitors, however, are more likely to identify reputation as the primary reason, followed closely by location and recommendations from a friend (Table 31).

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Table 32. Other Montana Ski Areas Visited this Season.

Other Ski Areas	Residents (n=50)	Nonresidents (n=240)
Bear Paw Ski Bowl	8%	0%
Blacktail Mountain	8%	0%
Bridger Bowl	78%	16%
Discovery Basin	0%	0%
Great Divide Snowsports	14%	0%
Lookout Pass	4%	0%
Lost Trail Powder Mountain	16%	0%
Maverick Mountain	2%	0%
Montana Snowbowl	0%	0%
Red Lodge	30%	2%
Showdown	12%	0%
Turner Mountain	2%	0%
Whitefish Mountain Resort	20%	3%

If Big Sky skiers, resident or nonresident, skied elsewhere in the 2018-19 season, it was most likely to be at Bridger Bowl. Large portions of residents also visited Red Lodge, Whitefish, Lost Trail, and Great Divide (Table 32).

Table 33. Information Sources Used.

Information Source(s)	Resident (n=50)	Nonresident (n=283)
Ski Area's Website	34%	60%
Word of Mouth	30%	52%
Search Engine (e.g., Google)	8%	25%
Ski Conditions Website (e.g., OnTheSnow)	8%	16%
None	40%	10%
Social Media (e.g., Facebook, Instagram)	6%	7%
Other Webpage	4%	7%
Visit Montana Website	4%	5%
Magazine Ad or Article	2%	5%
Travel or Other Blogs	0%	4%
Online Consumer Review (e.g., TripAdvisor)	0%	3%
Video, YouTube, Podcasts	0%	2%
Radio Ad	0%	0%
TV Ad	0%	0%

Nonresidents are most likely to rely on Big Sky's website compared to any other information source, followed closely by word of mouth. If residents used an information source, they too used Big Sky's site (Table 33).

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Expenditure Patterns

Table 34. Resident and Nonresident Expenditures per Group per Trip.

Expenditure Type	All Groups		Groups who Spent in Category	
	Residents (n=74)	Nonresidents (n=332)	Residents	Nonresidents
Accommodations	\$76.94	\$675.83	\$561.66	\$924.51
Gas	\$32.61	\$62.52	\$49.59	\$111.62
Restaurant, Bar	\$62.49	\$291.25	\$91.24	\$348.62
Groceries	\$26.55	\$139.05	\$58.73	\$183.84
Transportation Fares	\$0.49	\$ 4.51	\$18.06	\$25.92
Auto/RV Rental	\$3.03	\$38.66	\$110.52	\$165.08
Retail Sales	\$14.03	\$55.57	\$113.77	\$139.36
Lift Tickets	\$130.10	\$401.21	\$279.34	\$598.04
Permits, Entrance Fees	\$1.97	\$2.41	\$71.87	\$69.31
Equipment Rental	\$7.77	\$44.32	\$94.59	\$164.78
Snowmobile/Snowcoach	\$9.12	\$10.47	\$221.93	\$220.47
Guided Trip	\$2.05	\$13.01	\$150.00	\$216.43
Lessons	\$6.06	\$15.60	\$110.64	\$112.01
Other Services	\$1.21	\$6.36	\$88.37	\$74.47
Total	\$374.44	\$1,760.78		

Four percent of resident skiers at Big Sky purchased some form of a ski package at an average price of \$2,125. These ski packages included lodging and accommodations.⁵

Across all resident groups skiing at Big Sky, more money was spent on lift tickets (\$130.10 per group per trip) than in any other category. This was followed by accommodations (\$76.94) and restaurant and bar expenditures (\$62.49) (Table 34). Residents skiing at Big Sky during the 18/19 ski season spent \$5.9 million in aggregate for their ski trip experience.

Thirteen percent of Big Sky nonresident visitors purchased some variety of a travel/ski package at an average value of \$4,281 (N=41). Of those who purchased packages, all indicated some food or beverage was included; 63% included lift tickets; 51% included accommodations; 17% included flights; and 10% included equipment rentals.

Nonresidents spent more of their trip expenditure on accommodations than any other expenditure (\$675.83 per group per trip), followed by lift tickets (\$401.21), and restaurant/bar (\$291.25) (Table 34). Average group expenditures for nonresidents while in Montana was \$1,760.78. Nonresidents skiing at Big Sky during the 18/19 ski season contributed \$43.7 million to the Montana economy.

⁵ Caution: Only 3 of 85 resident respondents to this question indicated a package purchase.

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Bridger Bowl

The following data for Bridger Bowl is presented for resident and nonresident skiers. The resident sample size for this study at Bridger Bowl was 321, and the nonresident sample size was 166.

Demographics

Resident respondents were 53% male and 47% female while the nonresidents were 54% male and 46% female. The average age of respondents in this study was 38.5 years for resident skiers and 40.6 years for nonresident skiers.

The range of ages within the skier group varied slightly between resident and nonresident skiers. The 25-34, and 35-44 year old groups dominated the resident skiers, while the nonresidents were most often represented by the 45-54 age group (Table 35).

Table 36. Household Income.

Household Income	Resident (n=247)	Nonresident (n=128)
<\$25,000	13%	7%
\$25,000 to \$49,999	14%	4%
\$50,000 to \$74,999	16%	13%
\$75,000 to \$99,999	19%	13%
\$100,000 to \$149,000	19%	24%
\$150,000 to \$199,000	11%	21%
>\$200,000	9%	18%

Trip Characteristics

Ninety percent of resident ski groups did not spend a night away from home. Those who did were most likely to spend three or fewer nights away, for an average of 0.47 nights. Residents were most likely to say they spent one day skiing on this trip. Nonresidents spent an average of 6.47 nights away from home, with the most frequent length being four to five nights. They spent 4.1 days skiing while on this trip (Table 37).

Table 35. Percent of Groups with Various Ages.

Age Groups	Residents (n=239)	Nonresidents (n=131)
0-5 years old	12%	9%
6-10 years old	22%	19%
11-17 years old	23%	32%
18-24 years old	25%	35%
25-34 years old	33%	31%
35-44 years old	33%	33%
45-54 years old	23%	40%
55-64 years old	13%	28%
65-74 years old	8%	18%
75 and over	0%	3%

Household incomes of respondents varied significantly between residents and nonresidents. Nonresident skiers tended towards the higher income brackets, while residents were more evenly distributed across ranges (Table 36).

Table 37. Nights Away from Home.

Nights Away From Home	Resident (n=266)	Nonresident (n=153)
0	90%	5%
1	1%	1%
2	3%	4%
3	3%	10%
4	0%	20%
5	2%	18%
6	0%	12%
7	0%	10%
8	0%	8%
9	0%	1%
>10	1%	10%

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Table 38. Skier Lodging.

Accommodation	Residents	Nonresidents
	(n=25)	(n=137)
Hotel/Motel	32%	39%
Rented a room in a home/condo/cabin	8%	4%
My condo	0%	4%
Home of a friend or relative	40%	26%
Rental home/condo/cabin	28%	26%
My 2nd home	4%	3%
Ski resort lodge	0%	0%
Bed & Breakfast	4%	2%

Of those residents who spent nights away from home, 40% indicated they stayed at a home of family or a friend. Thirty-two percent stayed at a hotel or motel, and 28% at their condo. Nonresidents were most likely to stay in a hotel or motel, followed by 26% each at friends or relatives and a rental home (Table 38).

Three out of four resident skiers arrived at Bridger Bowl from 25 or fewer miles away (Table 39).

Table 39. Resident Miles from Home.

Miles	Proportion of Skiers (n=314)
10 miles or less	7%
11-25 miles	69%
26-50 miles	13%
51-75 miles	2%
76-100 miles	2%
More than 100 miles	7%

Table 40. Nonresident State, Province, or Country of Origin.

State, Province, or Country	Proportion of Skiers (n=151)
MN	19%
ND	11%
CA	11%
CO	5%
TX	4%
FL,SD,WA,VA,WI	3%
WY,MI,MO,UT, Germany	2%
AL,AZ,SK,OH,HI,IN,NE,NC,NJ,OK,PA	1%
<1% not reported.	

A large number of states are represented by nonresident visitors to Bridger Bowl, led by Minnesota, North Dakota, and California (Table 40).

Ski Characteristics

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

Table 41. Primary Purpose for being in Montana.

	All Purposes	Primary Purpose (n=154)
Skiing/Snowboarding	78%	54%
Vacation, Recreation, Pleasure	50%	17%
Visit Friends and Relatives	37%	19%
Just Passing Through	1%	0%
Shopping	5%	1%
Business	3%	3%
Other	2%	6%

Nonresidents were far and away most likely to indicate that skiing was their primary reason for being in Montana (Table 41).

Table 42. Skier Group Types.

Group Type	Residents (n=302)	Nonresidents (n=154)
Self	10%	2%
Couple	9%	8%
Family and Friends	18%	23%
Friends	24%	17%
Immediate Family	33%	37%
Extended Family	2%	12%
Organized Group or Club	2%	2%
Business Associates	1%	0%

Both resident and nonresident skiers at Bridger Bowl were most likely to be skiing with family (Table 42).

Over half of nonresidents skiing at Bridger Bowl arrived in Montana via car or truck (Table 43).

Table 43. Mode of Travel to Montana.

Mode of Entry	Proportion of Nonresidents (n=165)
Car or Truck	55%
Air	44%
Train	1%
Bus	0%

Eighty percent of residents and 73% of nonresidents at Bridger Bowl indicated they were there skiing (Table 44).

Table 44. Primary Activity.

Primary Activity of Respondent	Residents (n=312)	Nonresidents (n=157)
Skiing	80%	73%
Snowboarding	16%	17%
Both	4%	10%

Table 45. Skier and Snowboarder Ability Levels.

Ability Level	Residents	Nonresidents
Skiing	(n=260)	(n=127)
Beginner	12%	6%
Intermediate	33%	38%
Advanced	55%	56%
Snowboarding	(n=64)	(n=43)
Beginner	9%	12%
Intermediate	33%	56%
Advanced	58%	33%

Both skiers and snowboarders, whether resident or nonresident, were most likely to identify themselves as advanced or intermediate in their sport (Table 45).

Resort Choice and Information Sources

Table 46. Reasons for Visiting Bridger Bowl.

Reason(s) for Visiting	Residents		Nonresidents	
	All Reasons	Main Reason	All Reasons	Main Reason
	(n=280)	(n=274)	(n=148)	(n=149)
Price	53%	12%	66%	20%
Terrain	46%	9%	38%	5%
Location	84%	53%	74%	43%
Recommendation from a friend	8%	2%	31%	13%
Short lift lines	24%	0%	28%	2%
Family friendly	33%	4%	35%	3%
Reputation for good skiing	35%	4%	39%	7%
Own condo/home here	16%	0%	8%	0%
Auxiliary activities	2%	0%	3%	1%
Good snow	47%	7%	38%	5%
Ease of access	38%	8%	24%	0%

Location dominates both resident and nonresident visitors' main reasons for skiing at Bridger Bowl. Price comes in a distant second for both at 12% and 20% respectively (Table 46).

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Table 47. Other Montana Ski Areas Visited this Season.

Other Ski Areas	Residents (n=268)	Nonresidents (n=128)
Bear Paw Ski Bowl	0%	1%
Big Sky Resort	56%	54%
Blacktail Mountain	2%	1%
Discovery Basin	0%	0%
Great Divide Snowsports	6%	2%
Lookout Pass	1%	2%
Lost Trail Powder Mountain	14%	2%
Maverick Mountain	6%	0%
Montana Snowbowl	0%	0%
Red Lodge	11%	7%
Showdown	14%	2%
Turner Mountain	0%	0%
Whitefish Mountain Resort	11%	4%

More than half of Bridger Bowl skiers, resident or nonresident, skied Big Sky in the 2018-19 season. Resident skiers also got out to numerous other areas, led by Lost Trail and Showdown. Seven percent of nonresident skiers also skied Red Lodge during the season (Table 47).

Table 48. Information Sources Used.

Information Source(s)	Resident (n=268)	Nonresident (n=148)
Word of Mouth	25%	50%
Ski Area's Website	33%	46%
None	44%	18%
Search Engine (e.g., Google)	2%	18%
Ski Conditions Website (e.g., OnTheSnow)	11%	13%
Social Media (e.g., Facebook, Instagram)	2%	5%
Visit Montana Website	1%	5%
Other Webpage	0%	3%
Online Consumer Review (e.g., TripAdvisor)	0%	2%
Magazine Ad or Article	1%	1%
Radio Ad	0%	1%
Travel or Other Blogs	0%	1%
Video, YouTube, Podcasts	0%	1%
TV Ad	0%	0%

Nonresidents are most likely to rely on word of mouth, closely followed by Bridger Bowl's website compared to any other information source. When residents actually use an information source, they too use Bridger Bowl's site and word of mouth (Table 48).

Expenditure Patterns

Table 49. Resident and Nonresident Expenditures per Group per Trip.

Expenditure Type	All Groups		Groups who Spent in Category	
	Residents (n=256)	Nonresidents (n=139)	Residents	Nonresidents
Accommodations	\$19.98	\$446.45	\$341.00	\$721.59
Gas	\$19.23	\$87.36	\$27.35	\$114.56
Restaurant, Bar	\$36.59	\$278.39	\$54.46	\$319.81
Groceries	\$15.85	\$107.55	\$38.65	\$149.49
Transportation Fares	\$0.26	\$2.77	\$13.23	\$25.64
Auto/RV Rental	\$1.31	\$33.71	\$67.00	\$151.15
Retail Sales	\$9.66	\$70.25	\$107.51	\$126.81
Lift Tickets	\$86.98	\$355.33	\$191.96	\$433.26
Permits, Entrance Fees	\$0.16	\$4.66	\$40.00	\$58.91
Equipment Rental	\$15.81	\$54.90	\$77.83	\$121.13
Snowmobile/Snowcoach	\$0.90	\$3.87	\$114.96	\$134.46
Guided Trip	--	\$8.43	--	\$234.31
Lessons	\$12.82	\$19.69	\$84.16	\$97.72
Other Services	\$1.50	\$6.73	\$54.73	\$66.83
Total	\$221.05	\$1,480.09		

Three percent of resident skiers at Bridger Bowl purchased some form of a ski package at an average price of \$450.00. These ski packages were most likely to include lift tickets (70%) and equipment (30%).

Across all resident groups skiing at Bridger Bowl, more money was spent on lift tickets (\$86.98 per group per trip) than in any other category. This was followed by restaurant and bar expenditures (\$36.59) (Table 49). Residents skiing at Bridger during the 18/19 ski season spent \$14.3 million in aggregate for their ski trip experience.

Ten percent of nonresident Bridger Bowl visitors purchased some variety of a travel/ski package at an average value of \$1,313.80 (N=14). Of those who purchased packages, 22% included lift tickets; 15% included accommodations; and 12% included equipment rentals.

Nonresidents spent more of their trip expenditure on accommodations than any other expenditure (\$446.45 per group per trip), followed by lift tickets (\$355.33), and restaurant/bar (\$278.39) (Table 49). Average group expenditures for nonresidents while in Montana was \$1,480.09. Nonresidents skiing at Bridger Bowl during the 18/19 ski season contributed \$6.9 million to the Montana economy.

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Discovery Ski Area

The following data for Discovery is presented for resident and nonresident skiers. The resident sample size for this study at Discovery was 53, and the nonresident sample size was 10.⁶

Demographics

Resident respondents were 61% male and 39% female while the nonresidents were 44% male and 56% female. The average age of respondents in this study was 35.8 years for resident skiers and 41.6 years for nonresident skiers.

The range of ages within the skier group varied slightly between resident and nonresident skiers. The 25-34 year old group dominated the resident skiers, while that same group and the older 35-44 year olds were most prevalent among the nonresidents (Table 50).

Table 51. Household Income.

Household Income	Resident (n=51)	Nonresident (n=8)
<\$25,000	18%	0%
\$25,000 to \$49,999	33%	38%
\$50,000 to \$74,999	24%	25%
\$75,000 to \$99,999	16%	0%
\$100,000 to \$149,000	8%	38%
\$150,000 to \$199,000	0%	0%
>\$200,000	2%	0%

Household incomes of residents centered on the \$25,000 to \$74,999 ranges, while nonresidents also had representation in the \$100,000 to \$149,000 range (Table 51).

Trip Characteristics

Eighty-six percent of resident ski groups did not spend a night away from home (Table 52). Those who did were most likely to spend three or fewer nights away, for an average of 0.27 nights. Residents were most likely to say they spent one day skiing on this trip. Nonresidents spent an average of 3.0 nights away from home, with the most frequent length being two to three nights. They spent 1.89 days skiing while on this trip.

Table 50. Percent of Skiers with Various Ages.

Age Groups	Residents (n=50)	Nonresidents (n=9)
0-5 years old	10%	0%
6-10 years old	12%	11%
11-17 years old	10%	11%
18-24 years old	26%	22%
25-34 years old	60%	67%
35-44 years old	36%	89%
45-54 years old	28%	22%
55-64 years old	10%	33%
65-74 years old	2%	0%
75 and over	0%	0%

Table 52. Nights Away from Home.

Nights Away From Home	Resident (n=51)	Nonresident (n=9)
0	86%	11%
1	6%	0%
2	4%	44%
3	2%	33%
4	2%	0%
5	0%	0%
6	0%	0%
7	0%	0%
8	0%	0%
9	0%	0%
>10	13%	11%

⁶ CAUTION: When interpreting the Discovery data, readers should be aware of the small sample size and use resulting percentages cautiously. Despite the small sample size, results appear on target with other ski areas.

Table 53. Skier Lodging.

Accommodation	Residents	Nonresidents
	(n=7)	(n=8)
Hotel/Motel	14%	13%
Rented a room in a home/condo/cabin	0%	0%
My condo	0%	0%
Home of a friend or relative	57%	63%
Rental home/condo/cabin	29%	25%
My 2nd home	14%	0%
Ski resort lodge	0%	0%
Bed & Breakfast	0%	0%

Of those residents who stayed nights away from home (n=7), more than half indicated they stayed at a home of family or a friend. Nonresidents were similarly most likely to stay with friends or relatives (Table 53).

Sixty-five percent of resident skiers arrived at Discovery from between 51-100 miles away (Table 54).

Table 54. Resident Miles from Home.

Miles	Proportion of Skiers (n=52)
10 miles or less	0%
11-25 miles	13%
26-50 miles	19%
51-75 miles	27%
76-100 miles	38%
More than 100 miles	2%

Table 55. Nonresident State, Province, or Country of Origin.

State, Province, or Country	Proportion of Skiers (n=9)
BC	44%
ID	22%
SD	22%
WA	11%

The small nonresident sample limits the insights from skier origins to Discovery (Table 55).

Ski Characteristics

Seventy-five percent of resident groups skiing at Discovery had at least one person with a season pass. A third of the nine nonresident skier groups had at least one person in their group with a season pass.

Table 56. Primary Purpose for being in Montana.

	All Purposes	Primary Purpose (n=10)
Skiing/Snowboarding	73%	33%
Vacation, Recreation, Pleasure	64%	25%
Visit Friends and Relatives	91%	42%
Just Passing Through	0%	0%
Shopping	18%	0%
Business	0%	0%
Other	9%	0%

Consistent with where nonresidents indicated they spent their overnights, visiting family and friends was the most frequently cited primary purpose for skiing at Discovery (Table 56).

Table 57. Skier Group Types.

Group Type	Residents (n=52)	Nonresidents (n=8)
Self	10%	0%
Couple	2%	13%
Family and Friends	17%	50%
Friends	48%	0%
Immediate Family	8%	38%
Extended Family	12%	0%
Organized Group or Club	0%	0%
Business Associates	4%	0%

Resident skiers at Discovery were most likely to be skiing with friends, while nonresidents were most likely to be with friends and family (Table 57).

Nine of 10 nonresidents skiing at Discovery arrived in Montana via car or truck (Table 58).

Table 58. Mode of Travel to Montana.

Mode of Entry	Proportion of Nonresidents (n=10)
Car or Truck	90%
Air	10%
Train	0%
Bus	0%

Nonresidents and residents alike were most likely to indicate they were at Discovery to ski (Table 59).

Table 59. Primary Activity.

Primary Activity of Respondent	Residents (n=51)	Nonresidents (n=10)
Skiing	55%	60%
Snowboarding	39%	30%
Both	6%	10%

Table 60. Skier and Snowboarder Ability Levels.

Ability Level	Residents	Nonresidents
Skiing	(n=29)	(n=7)
Beginner	7%	14%
Intermediate	41%	57%
Advanced	52%	29%
Snowboarding	(n=21)	(n=2)
Beginner	10%	0%
Intermediate	29%	50%
Advanced	62%	50%

Resident skiers and snowboarders were most likely to identify as beginners, while nonresident skiers were more likely to be intermediate and snowboarders split evenly between advanced and intermediate (Table 60).

Resort Choice and Information Sources

Table 61. Reasons for Visiting Discovery.

Reason(s) for Visiting	Residents		Nonresidents	
	All Reasons	Main Reason	All Reasons	Main Reason
	(n=50)	(n=50)	(n=8)	(n=8)
Price	70%	24%	25%	0%
Terrain	62%	12%	13%	13%
Location	82%	30%	50%	13%
Recommendation from a friend	12%	4%	75%	50%
Short lift lines	16%	0%	0%	0%
Family friendly	26%	14%	13%	13%
Reputation for good skiing	42%	8%	50%	13%
Own condo/home here	0%	0%	0%	0%
Auxiliary activities	0%	0%	0%	0%
Good snow	52%	8%	13%	0%
Ease of access	8%	0%	0%	0%

Location dominates residents' main reasons for skiing at Discovery, followed by price. Nonresidents, however, are more likely to identify recommendation from a friend (Table 61).

Table 62. Other Montana Ski Areas Visited this Season.

Other Ski Areas	Residents (n=48)	Nonresidents (n=5)
Bear Paw Ski Bowl	0%	0%
Big Sky Resort	19%	0%
Blacktail Mountain	4%	0%
Bridger Bowl	13%	20%
Great Divide Snowsports	2%	0%
Lookout Pass	4%	40%
Lost Trail Powder Mountain	27%	40%
Maverick Mountain	0%	0%
Montana Snowbowl	0%	0%
Red Lodge	2%	0%
Showdown	2%	0%
Turner Mountain	0%	0%
Whitefish Mountain Resort	6%	0%

Resident skiers were most likely to also say they have skied at Lost Trail this season. Nonresidents who skied elsewhere in the 2018-19 season indicated Lookout Pass and Lost Trail most often (Table 62).

Table 63. Information Sources Used.

Information Source(s)	Resident (n=48)	Nonresident (n=9)
None	46%	0%
Word of Mouth	46%	78%
Ski Area's Website	44%	22%
Visit Montana Website	8%	0%
Ski Conditions Website (e.g., OnTheSnow)	10%	11%
Search Engine (e.g., Google)	8%	22%
Social Media (e.g., Facebook, Instagram)	13%	22%
Magazine Ad or Article	2%	0%
Radio Ad	0%	0%
TV Ad	0%	0%
Travel or Other Blogs	0%	0%
Video, YouTube, Podcasts	0%	0%
Other Webpage	0%	0%
Online Consumer Review (e.g., TripAdvisor)	0%	0%

Nonresidents are most likely to rely on word of mouth compared to any other information source. Where residents actually use an information source, they too rely on word of mouth as well as Discovery's website (Table 63).

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Expenditure Patterns⁷

Table 64. Resident and Nonresident Expenditure per Group per Trip.

Expenditure Type	All Groups		Groups who Spent in Category	
	Residents (n=51)	Nonresidents (n=131)	Residents	Nonresidents
Accommodations	\$11.76	\$253.30	\$300.00	\$596.59
Gas	\$43.04	\$89.11	\$44.80	\$103.14
Restaurant, Bar	\$61.76	\$191.84	\$85.14	\$288.02
Groceries	\$24.71	\$83.82	\$34.05	\$146.13
Transportation Fares	--	\$0.74	--	\$15.95
Auto/RV Rental	--	\$8.80	--	\$102.12
Retail Sales	\$2.94	\$43.75	\$50.00	\$121.81
Lift Tickets	\$85.10	\$177.70	\$155.00	\$324.41
Permits, Entrance Fees	--	\$6.52	--	\$33.84
Equipment Rental	\$3.63	\$35.61	\$46.25	\$115.61
Snowmobile/Snowcoach	\$0.78	\$2.46	\$40.00	\$114.83
Guided Trip	--	\$4.20	--	\$190.28
Lessons	\$2.94	\$10.79	\$75.00	\$101.03
Other Services	--	\$1.35	--	\$53.51
Total	\$236.67	\$909.97		

No residents or nonresidents indicated they purchased a ski package of any type at Discovery.

Across all resident groups skiing at Discovery, more money was spent on lift tickets (\$85.10 per group per trip) than in any other category. This was followed by restaurant and bar expenditures (\$61.76) (Table 64). Residents skiing at Discovery during the 18/19 ski season spent \$3.9 million in aggregate for their ski trip experiences.

Nonresidents at Discovery spent more of their trip expenditure on accommodations than any other expenditure (\$253.30 per group per trip), followed by restaurant/bar (\$191.84) and lift tickets (\$177.7) (Table 64). Average group expenditures for nonresidents while in Montana was \$909.97. Nonresidents skiing at Discovery during the 18/19 ski season contributed \$738,200 to the Montana economy.

⁷ To provide a suitable nonresident spending pattern for Discovery, spending from Discovery, Showdown, and Red Lodge were weighted and averaged. This does not apply to resident spending. Total contribution is specifically that attributable to Discovery.

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Red Lodge Mountain

The following data for Red Lodge Mountain is presented for resident and nonresident skiers. The resident sample size for this study at Red Lodge was 148, and the nonresident sample size was 102.

Demographics

Resident respondents were 67% male and 33% female while the nonresidents were 63% male and 37% female. The average age of respondents in this study was 38.4 years for resident skiers and 35.2 years for nonresident skiers.

The range of ages within the skier groups were similar between resident and nonresident skiers. The 25-34 year old group dominated both groups. (Table 65).

Table 66. Household Income.

Household Income	Resident (n=122)	Nonresident (n=87)
<\$25,000	6%	2%
\$25,000 to \$49,999	16%	11%
\$50,000 to \$74,999	20%	15%
\$75,000 to \$99,999	16%	18%
\$100,000 to \$149,999	25%	32%
\$150,000 to \$199,000	10%	9%
>\$200,000	9%	11%

Household incomes of both resident and nonresident respondents were quite dispersed throughout the income categories. Both peaked in the \$100,000 to \$149,999 bracket (Table 66).

Trip Characteristics

Sixty-four percent of resident ski groups did not spend a night away from home. Those who did were most likely to spend three or fewer nights away, for an average of 1.14 nights (Table 67). Residents were most likely to say they spent one day skiing on this trip. Nonresidents spent an average of 4.86 nights away from home, with the most frequent length being three to four nights. They spent 3.01 days skiing while on this trip.

Table 65. Percent of Groups with Various Ages.

Age Groups	Residents (n=123)	Nonresidents (n=85)
0-5 years old	3%	6%
6-10 years old	11%	11%
11-17 years old	21%	26%
18-24 years old	18%	38%
25-34 years old	46%	47%
35-44 years old	37%	36%
45-54 years old	18%	25%
55-64 years old	13%	15%
65-74 years old	6%	5%
75 and over	2%	1%

Table 67. Nights Away from Home.

Nights Away From Home	Resident (n=132)	Nonresident (n=96)
0	64%	13%
1	5%	2%
2	15%	10%
3	10%	18%
4	2%	23%
5	2%	15%
6	0%	3%
7	1%	4%
8	0%	1%
9	0%	1%
>10	1%	10%

Table 68. Skier Lodging.

Accommodation	Residents	Nonresidents
	(n=46)	(n=83)
Hotel/Motel	39%	22%
Rented a room in a home/condo/cabin	15%	13%
My condo	11%	8%
Home of a friend or relative	11%	30%
Rental home/condo/cabin	20%	29%
My 2nd home	7%	4%
Ski resort lodge	0%	0%
Bed & Breakfast	4%	0%

Of those residents who spent nights away from home, 39% stayed at a hotel or motel, while another 20% rented a home, condo, or cabin. Nonresidents were most likely to stay at the home of a family member or friend, followed closely by rental home or condo (Table 68).

Residents were most likely to have arrived from 51-75 miles from Red Lodge. Another 23% traveled more than 100 miles (Table 69).

Table 69. Resident Miles from Home.

Miles	Proportion of Skiers (n=140)
10 miles or less	18%
11-25 miles	4%
26-50 miles	18%
51-75 miles	35%
76-100 miles	3%
More than 100 miles	23%

Table 70. Nonresident State, Province, or Country of Origin.

State, Province, or Country	Proportion of Skiers (n=94)
ND	30%
WY	19%
MN	14%
TX	4%
WI	4%
CO,SK	3%
FL,ID,IN,MI,SC,WA	2%
AL,AB,NE,LA,NJ,NY,PA,SD,TN	1%
<1% not reported	

A large number of states are represented by nonresident visitors to Red Lodge, led by North Dakota, then Wyoming and Minnesota (Table 70).

Ski Characteristics

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

Table 71. Primary Purpose for being in Montana.

	All Purposes	Primary Purpose (n=108)
Skiing/Snowboarding	78%	66%
Vacation, Recreation, Pleasure	34%	8%
Visit Friends and Relatives	28%	23%
Just Passing Through	1%	1%
Shopping	1%	0%
Business	2%	2%
Other	1%	0%

Both residents and nonresidents were far and away most likely to indicate that skiing was their primary reason for being in Montana (Table 71).

Table 72. Skier Group Types.

Group Type	Residents (n=136)	Nonresidents (n=98)
Self	8%	7%
Couple	10%	10%
Family and Friends	25%	21%
Friends	32%	27%
Immediate Family	15%	27%
Extended Family	4%	8%
Organized Group or Club	3%	0%
Business Associates	3%	0%

Resident skiers at Red Lodge were most likely to be skiing with friends, while nonresidents were equally likely to be with friends or immediate family (Table 72).

More than three out of four nonresidents skiing at Red Lodge arrived in Montana via car or truck (Table 73).

Table 73. Mode of Travel to Montana.

Mode of Entry	Proportion of Nonresidents (n=101)
Car or Truck	78%
Air	21%
Train	1%
Bus	0%

Majorities of both nonresident and resident respondents at Red Lodge indicated they were there skiing as compared to snowboarding or both (Table 74).

Table 74. Primary Activity.

Primary Activity of Respondent	Residents (n=143)	Nonresidents (n=100)
Skiing	62%	55%
Snowboarding	31%	42%
Both	7%	3%

Table 75. Skier and Snowboarder Ability Levels.

Ability Level	Residents	Nonresidents
Skiing	(n=95)	(n=58)
Beginner	7%	21%
Intermediate	26%	43%
Advanced	66%	36%
Snowboarding	(n=53)	(n=42)
Beginner	15%	24%
Intermediate	23%	38%
Advanced	62%	38%

Resident skiers and snowboarders were most likely to identify as advanced, while nonresidents were fairly split across ability levels (Table 75).

Resort Choice and Information Sources

Table 76. Reasons for Visiting Red Lodge.

Reason(s) for Visiting	Residents			
	All Reasons	Main Reason	All Reasons	Main Reason
	(n=124)	(n=112)	(n=97)	(n=90)
Price	27%	8%	37%	11%
Terrain	19%	6%	12%	1%
Location	72%	59%	64%	44%
Recommendation from a friend	7%	2%	29%	21%
Short lift lines	22%	1%	19%	2%
Family friendly	29%	4%	23%	8%
Reputation for good skiing	19%	4%	15%	2%
Own condo/home here	15%	0%	8%	0%
Auxiliary activities	2%	1%	0%	0%
Good snow	34%	8%	21%	7%
Ease of access	34%	6%	18%	3%

Location dominates both resident and nonresident visitors' main reasons for skiing at Red Lodge. Nonresidents are also likely (21%) to identify recommendations from a friend as a main reason for visiting (Table 76 76).

Table 77. Other Montana Ski Areas Visited this Season.

Other Ski Areas	Residents (n=124)	Nonresidents (n=80)
Bear Paw Ski Bowl	2%	0%
Big Sky Resort	50%	30%
Blacktail Mountain	3%	0%
Bridger Bowl	48%	23%
Discovery Basin	0%	0%
Great Divide Snowsports	11%	1%
Lookout Pass	10%	3%
Lost Trail Powder Mountain	8%	3%
Maverick Mountain	5%	0%
Montana Snowbowl	0%	0%
Showdown	17%	1%
Turner Mountain	1%	0%
Whitefish Resort	26%	19%

Both resident and nonresident skiers who skied at Red Lodge and indicated other locations were most likely to also ski at Big Sky and Bridger Bowl. Whitefish Mountain also garnered a significant share of skiers who also skied at Red Lodge (Table 77).

Table 78. Information Sources Used.

Information Source(s)	Resident (n=124)	Nonresident (n=95)
None	39%	26%
Word of Mouth	26%	46%
Ski Area's Website	37%	31%
Visit Montana Website	1%	3%
Ski Conditions Website (e.g., OnTheSnow)	16%	11%
Search Engine (e.g., Google)	4%	8%
Social Media (e.g., Facebook, Instagram)	10%	8%
Magazine Ad or Article	1%	0%
Radio Ad	0%	1%
TV Ad	1%	0%
Travel or Other Blogs	0%	0%
Video, YouTube, Podcasts	2%	1%
Other Webpage	1%	1%
Online Consumer Review (e.g., TripAdvisor)	0%	0%

Nonresidents are most likely to rely on word of mouth, followed by Red Lodge's website. When residents actually used an information source, they too used Red Lodge's website (Table 78).

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Expenditure Patterns⁸

Table 79. Resident and Nonresident Expenditure per Group per Trip.

Expenditure Type	All Groups		Groups who Spent in Category	
	Residents (n=131)	Nonresidents (n=131)	Residents	Nonresidents
Accommodations	\$86.34	\$253.30	\$355.07	\$596.59
Gas	\$49.08	\$89.11	\$37.77	\$103.14
Restaurant, Bar	\$91.84	\$191.84	\$67.61	\$288.02
Groceries	\$35.07	\$83.82	\$44.63	\$146.13
Transportation Fares	\$0.63	\$0.74	\$16.77	\$15.95
Auto/RV Rental	\$0.98	\$8.80	\$94.54	\$102.12
Retail Sales	\$14.52	\$43.75	\$94.37	\$121.81
Lift Tickets	\$89.52	\$177.70	\$147.36	\$324.41
Permits, Entrance Fees	\$3.20	\$6.52	\$46.78	\$33.84
Equipment Rental	\$16.76	\$35.61	\$74.95	\$115.61
Snowmobile/Snowcoach	\$0.54	\$2.46	\$125.71	\$114.83
Guided Trip	--	\$4.20	\$133.46	\$190.28
Lessons	\$4.64	\$10.79	\$79.32	\$101.03
Other Services	\$0.92	\$1.35	\$51.45	\$53.51
Total	\$394.05	\$909.97		

Five percent of resident skiers at Red Lodge purchased some form of a ski package at an average price of \$1,433.33. These ski packages most often included lift tickets and accommodations.

Across all resident groups skiing at Red Lodge, more money was spent on restaurant and bar purchases (\$91.84) than any other category, followed closely by lift tickets (\$89.52 per group per trip). These were also closely followed by accommodations (\$86.34) (Table 79). Residents skiing at Red Lodge during the 18/19 ski season spent \$2.3 million in aggregate for their ski trip experiences.

Six percent of Red Lodge nonresident visitors purchased some variety of a travel/ski package at an average value of \$339.75. These consisted primarily of lift tickets and equipment rentals.

Nonresidents spent more of their trip expenditure on accommodations than any other expenditure (\$253.30 per group per trip), followed by restaurant/bar (\$191.84) and lift tickets (\$177.70) (Table 79). Average group expenditures for nonresidents while in Montana was \$909.97. Nonresidents skiing at Red Lodge during the 18/19 ski season contributed \$2.99 million to the Montana economy.

⁸ To provide a suitable nonresident spending pattern for Red Lodge, spending from Discovery, Showdown, and Red Lodge were weighted and averaged. This does not apply to resident spending. Total contribution is specifically that attributable to Red Lodge.

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Showdown Montana

The following data for Showdown Montana is presented for resident and nonresident skiers. The resident sample size for this study at Showdown was 374, and the nonresident sample size was 29.⁹

Demographics

Resident respondents were 68% male and 32% female while the nonresidents were 74% male and 26% female. The average age of respondents in this study was 38.8 years for resident skiers and 32.4 years for nonresident skiers.

The range of ages within the skier groups varied slightly between resident and nonresident skiers. The 25-34 year old group dominated the resident skiers, while the 18-24 year old group was most represented in nonresident groups (Table 80).

Table 81. Household Income.

Household Income	Resident (n=306)	Nonresident (n=22)
<\$25,000	8%	9%
\$25,000 to \$49,999	28%	14%
\$50,000 to \$74,999	26%	32%
\$75,000 to \$99,999	16%	5%
\$100,000 to \$149,999	14%	5%
\$150,000 to \$199,999	5%	18%
>\$200,000	1%	18%

Trip Characteristics

Eighty-nine percent of Showdown resident ski groups did not spend a night away from home. Those who did were most likely to spend three or fewer nights away, for an average of 0.21 nights. Residents were most likely to say they spent one day skiing on this trip. Showdown nonresidents spent an average of 4.04 nights away from home, with the most frequent length being three to four nights. They spent 2.18 days skiing while on this trip (Table 82).

Table 80. Percent of Groups with Various Ages.

Age Groups	Residents (n=209)	Nonresidents (n=23)
0-5 years old	5%	4%
6-10 years old	17%	22%
11-17 years old	21%	22%
18-24 years old	30%	61%
25-34 years old	49%	43%
35-44 years old	30%	30%
45-54 years old	15%	17%
55-64 years old	11%	9%
65-74 years old	8%	4%
75 and over	1%	0%

Household incomes of respondents varied by residency. Nonresident skiers tended towards higher income brackets (>\$150,000) and another third between \$50,000 - \$74,999. Residents were more concentrated in the \$25,000-\$74,999 ranges (Table 81).

Table 82. Nights Away from Home.

Nights Away From Home	Resident (n=281)	Nonresident (n=27)
0	89%	4%
1	6%	11%
2	1%	4%
3	3%	30%
4	1%	19%
5	0%	11%
6	0%	0%
7	0%	15%
8	0%	4%
9	0%	4%
>10	0%	0%

⁹ CAUTION: When interpreting the nonresident Showdown data, readers should be aware of the small sample size and use resulting percentages cautiously. Despite the small sample size, results appear on target with other ski areas.

Table 83. Skier Lodging.

Accommodation	Residents	Nonresidents
	(n=32)	(n=24)
Hotel/Motel	38%	29%
Rented a room in a home/condo/cabin	0%	13%
My condo	13%	0%
Home of a friend or relative	47%	50%
Rental home/condo/cabin	3%	0%
My 2nd home	0%	8%
Ski resort lodge	0%	0%
Bed & Breakfast	6%	0%

Of those residents who stayed nights away from home, nearly half indicated they stayed at the home of family or a friend. Thirty-eight percent stayed in a hotel or motel. Nonresidents were similarly most likely to stay with family or a friend (50%) (Table 83).

Sixty-five percent of resident skiers arrived at Showdown Montana from between 51-75 miles away (Table 84).

Table 84. Resident Miles from Home.

Miles	Proportion of Skiers (n=377)
10 miles or less	0%
11-25 miles	0%
26-50 miles	5%
51-75 miles	65%
76-100 miles	7%
More than 100 miles	23%

Table 85. Nonresident State, Province, or Country of Origin.

State, Province, or Country	Proportion of Skiers (n=24)
AB,SK,ID,MA,WA	13% ea.
AZ,WY	8% ea.
DC,GA,NE,OK, Germany	4% ea.

The small nonresident sample limits the insights from skier origins to Showdown. Even the large percent origins represent three respondents each (Table 85).

Ski Characteristics

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

Table 86. Primary Purpose for being in Montana.

	All Purposes	Primary Purpose (n=37)
Skiing/Snowboarding	66%	41%
Vacation, Recreation, Pleasure	53%	8%
Visit Friends and Relatives	53%	41%
Just Passing Through	6%	3%
Shopping	6%	0%
Business	0%	0%
Other	6%	8%

Nonresidents were equally likely (41%) to indicate they were either primarily in Montana to ski/snowboard or to visit friends and relatives (Table 86).

Table 87. Skier Group Types.

Group Type	Residents (n=322)	Nonresidents (n=26)
Self	7%	0%
Couple	11%	19%
Family and Friends	17%	38%
Friends	43%	23%
Immediate Family	12%	12%
Extended Family	2%	4%
Organized Group or Club	6%	4%
Business Associates	2%	0%

Resident skiers at Showdown were most likely to be skiing with friends, while nonresidents were most likely to be with family and friends (Table 87).

Fifty-six percent of nonresident skiers traveled to Montana by car, while another 44% arrived by air (Table 88).

Table 88. Mode of Travel to Montana.

Mode of Entry	Proportion of Nonresidents (n=32)
Car or Truck	56%
Air	44%
Train	0%
Bus	0%

Seventy percent or more of both residents and nonresident respondents at Showdown indicated they were there skiing (Table 89).

Table 89. Primary Activity.

Primary Activity of Respondent	Residents (n=358)	Nonresidents (n=29)
Skiing	70%	76%
Snowboarding	29%	24%
Both	1%	0%

Table 90. Skier and Snowboarder Ability Levels.

Ability Level	Residents	Nonresidents
Skiing	(n=271)	(n=21)
Beginner	12%	18%
Intermediate	33%	48%
Advanced	55%	34%
Snowboarding	(n=124)	(n=7)
Beginner	8%	0%
Intermediate	26%	43%
Advanced	66%	57%

Both resident skiers and snowboarders, as well as nonresident snowboarders, were most likely to identify themselves as advanced in their sport, while nonresident skiers were more likely to consider themselves intermediate (Table 90).

Resort Choice and Information Sources

Table 91. Reasons for Visiting Showdown.

Reason(s) for Visiting	Residents		Nonresidents	
	All Reasons	Main Reason	All Reasons	Main Reason
	(n=217)	(n=202)	(n=23)	(n=20)
Price	29%	6%	17%	10%
Terrain	10%	0%	13%	0%
Location	86%	78%	57%	45%
Recommendation from a friend	5%	0%	39%	25%
Short lift lines	9%	1%	4%	0%
Family friendly	10%	1%	17%	5%
Reputation for good skiing	8%	2%	13%	10%
Own condo/home here	4%	0%	4%	0%
Auxiliary activities	0%	0%	0%	0%
Good snow	21%	10%	17%	5%
Ease of access	6%	0%	4%	0%

Location dominates both resident (78%) and nonresident (45%) visitors' main reasons for skiing at Showdown. Another 25% of nonresidents identify recommendation from a friend as primary reason (Table 91).

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Table 92. Other Montana Ski Areas Visited this Season.

Other Ski Areas	Residents (n=193)	Nonresidents (n=24)
Bear Paw Ski Bowl	7%	4%
Big Sky Resort	34%	8%
Blacktail Mountain	9%	4%
Bridger Bowl	33%	13%
Discovery Basin	0%	0%
Great Divide Snowsports	17%	0%
Lookout Pass	0%	0%
Lost Trail Powder Mountain	8%	0%
Maverick Mountain	3%	0%
Montana Snowbowl	0%	0%
Red Lodge	12%	0%
Turner Mountain	0%	0%
Whitefish Mountain Resort	21%	0%

If Showdown skiers, resident or nonresident, skied elsewhere in the 2018-19 season, it was most likely at Bridger Bowl or Big Sky (Table 92).

Table 93. Information Sources Used.

Information Source(s)	Resident (n=193)	Nonresident (n=24)
None	21%	8%
Word of Mouth	13%	50%
Ski Area's Website	69%	46%
Visit Montana Website	0%	0%
Ski Conditions Website (e.g., OnTheSnow)	5%	4%
Search Engine (e.g., Google)	4%	4%
Social Media (e.g., Facebook, Instagram)	4%	0%
Magazine Ad or Article	0%	0%
Radio Ad	1%	0%
TV Ad	0%	0%
Travel or Other Blogs	0%	0%
Video, YouTube, Podcasts	0%	0%
Other Webpage	1%	0%
Online Consumer Review (e.g., TripAdvisor)	0%	4%

Nonresidents are most likely to rely on word of mouth (50%) or Showdown's website (46%) compared to any other information source. When residents actually used an information source, they too relied on Showdown's site (Table 93).

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Expenditure Patterns¹⁰

Table 94. Resident and Nonresident Expenditures per Group per Trip.

Expenditure Type	All Groups		Groups who Spent in Category	
	Residents (n=347)	Nonresidents (n=131)	Residents	Nonresidents
Accommodations	\$5.62	\$253.30	\$162.50	\$596.59
Gas	\$20.05	\$89.11	\$31.06	\$103.14
Restaurant, Bar	\$29.71	\$191.84	\$37.36	\$288.02
Groceries	\$7.04	\$83.82	\$23.48	\$146.13
Transportation Fares	--	\$0.74	--	\$15.95
Auto/RV Rental	--	\$8.80	--	\$102.12
Retail Sales	\$3.17	\$43.75	\$64.65	\$121.81
Lift Tickets	\$43.85	\$177.70	\$79.67	\$324.41
Permits, Entrance Fees	\$0.43	\$6.52	\$73.87	\$33.84
Equipment Rental	\$4.49	\$35.61	\$55.65	\$115.61
Snowmobile/Snowcoach	--	\$2.46	--	\$114.83
Guided Trip	--	\$4.20	--	\$190.28
Lessons	\$2.26	\$10.79	\$71.22	\$101.03
Other Services	\$0.02	\$1.35	\$7.00	\$53.51
Total	\$116.63	\$909.97		

One percent of resident skiers (n=4) at Showdown purchased some form of a ski package at an average price of \$445.25. These ski packages most often included lift tickets and equipment rentals.

Across all resident groups skiing at Showdown, more money was spent on lift tickets (\$43.85 per group per trip), followed by restaurant and bar purchases (\$29.71) than any other category (Table 94). Residents skiing at Showdown during the 18/19 ski season spent \$2.3 million in aggregate for their ski trip experiences.

No nonresident respondents indicated purchasing any travel packages.

Nonresidents spent more of their trip expenditure on accommodations than any other expenditure (\$253.30 per group per trip), followed by restaurant/bar (\$191.84) and lift tickets (\$177.70) (Table 94). Average group expenditures for nonresidents while in Montana was \$909.97. Nonresidents skiing at Showdown during the 18/19 ski season contributed \$729,200 to the Montana economy.

¹⁰ To provide a suitable nonresident spending pattern for Showdown, spending from Discovery, Showdown, and Red Lodge were weighted and averaged. This does not apply to resident spending. Total contribution is specifically that attributable to Showdown.

Whitefish Mountain Resort

The following data for Whitefish Mountain Resort is presented for resident and nonresident skiers. The resident sample size for this study was 113, and the nonresident sample size was 147.

Demographics

Resident respondents were 59% male and 41% female while the nonresidents were 55% male and 45% female. The average age of respondents in this study was 40.9 years for resident skiers and 41.2 years for nonresident skiers.

The range of ages within the skier groups varied slightly between resident and nonresident skiers. The 35-44 year old group dominated the resident skiers (42%), while that same group, and those one age group younger and older were also equally prevalent among the nonresidents (Table 95).

Table 96. Household Income.

Household Income	Resident (n=112)	Nonresident (n=99)
<\$25,000	12%	3%
\$25,000 to \$49,999	12%	6%
\$50,000 to \$74,999	20%	16%
\$75,000 to \$99,999	20%	17%
\$100,000 to \$149,000	16%	23%
\$150,000 to \$199,000	5%	11%
>\$200,000	16%	23%

Trip Characteristics

Eighty-one percent of resident ski groups did not spend a night away from home. Those who did were most likely to spend two or fewer nights away, for an average of 0.99 nights. Residents were most likely to say they spent one day skiing on this trip. Nonresidents spent an average of 6.53 nights away from home, with the most frequent length being four to five nights. They spent 4.3 days skiing while on this trip (Table 97).

Table 95. Percent of Groups with Various Ages.

Age Groups	Residents (n=102)	Nonresidents (n=89)
0-5 years old	13%	12%
6-10 years old	22%	7%
11-17 years old	7%	19%
18-24 years old	14%	27%
25-34 years old	30%	38%
35-44 years old	42%	36%
45-54 years old	27%	36%
55-64 years old	13%	31%
65-74 years old	7%	22%
75 and over	0%	4%

Household incomes of respondents varied slightly between residents and nonresidents. Nonresident skiers tended towards the higher income brackets, with 23% reporting household incomes in excess of \$200,000. Residents were more evenly distributed across income ranges (Table 96).

Table 97. Nights Away from Home.

Nights Away From Home	Resident (n=116)	Nonresident (n=106)
0	81%	2%
1	3%	2%
2	9%	8%
3	3%	10%
4	0%	19%
5	3%	18%
6	0%	9%
7	0%	14%
8	1%	5%
9	0%	0%
>10	2%	13%

Table 98. Skier Lodging.

Accommodation	Residents (n=19)	Nonresidents (n=99)
Hotel/Motel	47%	29%
Rented a room in a home/condo/cabin	0%	9%
My condo	16%	10%
Home of a friend or relative	21%	19%
Rental home/condo/cabin	21%	22%
My 2nd home	5%	10%
Ski resort lodge	0%	4%
Bed & Breakfast	0%	0%

Of those residents who spent nights away from home, 47% indicated they stayed at a hotel or motel. Homes of friends and relatives, and rental homes also each garnered 21% of residents who stayed overnight. Nonresidents were most likely to stay in hotel or motel, followed by a rental home or condo (Table 98).

Eighty percent of resident skiers arrived at Whitefish Mountain from less than 25 miles away (Table 99).

Table 99. Resident Miles from Home.

Miles	Proportion of Skiers (n=136)
10 miles or less	45%
11-25 miles	35%
26-50 miles	7%
51-75 miles	3%
76-100 miles	1%
More than 100 miles	10%

Table 100. Nonresident State, Province, or Country of Origin.

State, Province, or Country	Proportion of Skiers (n=99)
AB	18%
CA	12%
WA	10%
FL	6%
MN	5%
TX	5%
ND	4%
VA	3%
AK,BC,CO,SK,CT,OH,ID,IN,MA,MI,OR,PA,WI	2%
AL,AZ,AR,GA,HI,NC, China, South Africa, United Kingdom	1%

A large number of states and provinces are represented by nonresident visitors, led by Alberta, California, and Washington (Table 100).

Ski Characteristics

Eighty-five percent of resident groups skiing at Whitefish had at least one person with a season pass. Thirty-one percent of the nonresident skier groups had at least one person in their group with a season pass.

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Table 101. Primary Purpose for being in Montana.

	All Purposes	Primary Purpose (n=107)
Skiing/Snowboarding	78%	65%
Vacation, Recreation, Pleasure	51%	15%
Visit Friends and Relatives	29%	14%
Just Passing Through	1%	1%
Shopping	4%	0%
Business	4%	3%
Other	2%	2%

Nonresidents were far and away most likely to indicate that skiing was their primary reason for being in Montana (Table 101).

Table 102. Skier Group Types.

Group Type	Residents (n=129)	Nonresidents (n=105)
Self	19%	6%
Couple	10%	10%
Family and Friends	19%	29%
Friends	23%	10%
Immediate Family	25%	29%
Extended Family	5%	9%
Organized Group or Club	0%	5%
Business Associates	0%	3%

Resident skiers at Whitefish were most likely to be skiing with immediate family (25%) or friends (23%), while nonresidents were equally likely to be with friends and family (29%) or immediate family (29%) (Table 102).

Half of nonresidents skiing at Whitefish Mountain arrived in Montana via air travel (Table 103).

Table 103. Mode of Travel to Montana.

Mode of Entry	Proportion of Nonresidents (n=113)
Car or Truck	43%
Air	50%
Train	6%
Bus	0%

Three out of four nonresident and resident respondents at Whitefish indicated they were there skiing (Table 104).

Table 104. Primary Activity.

Primary Activity of Respondent	Residents (n=142)	Nonresidents (n=112)
Skiing	77%	75%
Snowboarding	16%	13%
Both	7%	12%

Table 105. Skier and Snowboarder Ability Levels.

Ability Level	Residents	Nonresidents
Skiing	(n=119)	(n=95)
Beginner	3%	11%
Intermediate	35%	51%
Advanced	62%	39%
Snowboarding	(n=34)	(n=26)
Beginner	3%	12%
Intermediate	38%	42%
Advanced	59%	46%

Resident skiers and snowboarders were most likely to indicate they are advanced in their sport. Nonresident skiers tended to rate their level at intermediate, while snowboarders were close to evenly split between advanced and intermediate (Table 105).

Resort Choice and Information Sources

Table 106. Reasons for Visiting Whitefish.

Reason(s) for Visiting	Residents		Nonresidents	
	All Reasons	Main Reason	All Reasons	Main Reason
	(n=120)	(n=102)	(n=104)	(n=94)
Price	16%	2%	34%	5%
Terrain	23%	4%	35%	5%
Location	62%	51%	46%	43%
Recommendation from a friend	6%	4%	33%	13%
Short lift lines	20%	2%	25%	2%
Family friendly	23%	6%	26%	3%
Reputation for good skiing	23%	6%	44%	7%
Own condo/home here	28%	0%	14%	0%
Auxiliary activities	3%	2%	2%	1%
Good snow	44%	11%	44%	5%
Ease of access	33%	13%	18%	0%

Location dominates both resident (51%) and nonresident (43%) skiers' main reasons for skiing at Whitefish Mountain. Both were also likely (44%) to indicate good snow as one of their reasons for choosing Whitefish (Table 106).

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Table 107. Other Montana Ski Areas Visited this Season.

Other Ski Areas	Residents (n=114)	Nonresidents (n=83)
Bear Paw Ski Bowl	1%	0%
Big Sky Resort	24%	10%
Blacktail Mountain	25%	2%
Bridger Bowl	18%	5%
Discovery Basin	0%	0%
Great Divide Snowsports	4%	1%
Lookout Pass	11%	4%
Lost Trail Powder Mountain	15%	2%
Maverick Mountain	5%	1%
Montana Snowbowl	0%	0%
Red Lodge	7%	0%
Showdown	4%	2%
Turner Mountain	5%	2%

Resident Whitefish skiers who also skied elsewhere in Montana did so at a variety of locations, led by Blacktail Mountain (25%) and Big Sky (24%). Most nonresidents did not ski elsewhere, but those who did were most likely to have skied Big Sky (10%) (Table 107).

Table 108. Information Sources Used.

Information Source(s)	Resident (n=114)	Nonresident (n=100)
None	38%	14%
Word of Mouth	24%	59%
Ski Area's Website	39%	48%
Visit Montana Website	1%	2%
Ski Conditions Website (e.g., OnTheSnow)	16%	19%
Search Engine (e.g., Google)	6%	17%
Social Media (e.g., Facebook, Instagram)	11%	4%
Magazine Ad or Article	1%	3%
Radio Ad	0%	1%
TV Ad	0%	0%
Travel or Other Blogs	0%	2%
Video, YouTube, Podcasts	0%	1%
Other Webpage	3%	2%
Online Consumer Review (e.g., TripAdvisor)	0%	2%

Nonresidents were most likely to rely on word of mouth (59%), followed by Whitefish Ski Resort's website (48%). A large portion of resident skiers used no sources. When residents actually used an information source, they too used Whitefish Ski Resort's website (39%) (Table 108).

Expenditure Patterns

Table 109. Resident and Nonresident Expenditures per Group per Trip.

Expenditure Type	All Groups		Groups who Spent in Category	
	Residents (n=105)	Nonresidents (n=101)	Residents	Nonresidents
Accommodations	\$50.67	\$440.29	\$483.64	\$799.04
Gas	\$30.02	\$71.45	\$40.94	\$104.51
Restaurant, Bar	\$95.47	\$323.17	\$123.75	\$351.89
Groceries	\$32.95	\$138.63	\$73.60	\$176.44
Transportation Fares	\$0.49	\$5.64	\$25.56	\$23.01
Auto/RV Rental	\$6.99	\$19.76	\$146.82	\$148.95
Retail Sales	\$20.41	\$78.73	\$112.80	\$122.46
Lift Tickets	\$72.62	\$276.57	\$262.94	\$381.74
Permits, Entrance Fees	\$0.46	\$3.46	\$12.00	\$42.34
Equipment Rental	\$10.06	\$52.47	\$75.44	\$128.56
Snowmobile/Snowcoach	--	\$11.18	--	\$156.53
Guided Trip	\$2.38	\$10.37	\$125.19	\$169.36
Lessons	\$10.32	\$13.59	\$98.50	\$88.80
Other Services	\$2.64	\$10.43	\$55.35	\$85.17
Total	\$335.47	\$1,455.73		

Two percent of resident skiers (n=3) at Whitefish purchased some form of a ski package at an average price of \$700. Respondents did not indicate the items included.

Across all resident groups skiing at Whitefish more money was spent on restaurant and bars (\$95.47 per group per trip) than in any other category. This was followed by lift tickets (\$72.62 per group per trip) and accommodations (\$50.67) (Table 109). Residents skiing at Whitefish during the 18/19 ski season spent \$13 million in aggregate for their ski trip experiences.

Twenty percent of Whitefish Ski Resort nonresident visitors purchased some variety of a travel/ski package at an average value of \$4,228 (N=18). Of those who purchased packages, 27% included lift tickets; 12% included accommodations; and 12% included equipment rentals.

Nonresidents spent more of their trip expenditure on accommodations than any other expenditure (\$440.29 per group per trip), followed by restaurant and bar (\$323.17), and lift tickets (\$276.57) (Table 109). Average group expenditures for nonresidents while in Montana was \$1,455.73. Nonresidents skiing at Whitefish during the 18/19 ski season contributed \$12.1 million to the Montana economy.

Conclusions & Recommendations

During the 2009-2010 ski season, a comparable study was conducted as the one laid out here. At that time, Montana ski areas welcomed 1.36 million skier visits, 65% of whom were residents spending an average of \$165.55 per group per trip.¹¹ Meanwhile, the 35% who were nonresidents spent \$1,494.72 per group per trip on average, generating \$97,872,000 in economic impact to the state.¹²

In the 2018-2019 ski season, ski areas hosted 1.77 million skier visits, with residents representing 57% of those visits and nonresidents the remaining 43%. Residents throughout the 18/19 season spent \$288.09 per group per trip, while nonresidents spent \$1,596.01 per group per trip. The interaction of increased total skier visits, increased proportion of nonresidents, and the increased average group spending yielded a total economic impact of \$175,848,000; an 81% increase over the 09/10 season.

Much of the change in nonresident proportions is derived from changes at Big Sky. Since the 09/10 season, nonresident proportions at Big Sky have dramatically changed from 42% to 82% (Table 110). It is important to note that during the 09/10 season, Moonlight had not yet been incorporated into Big Sky. Bridger Bowl, Discovery, Red Lodge, and Showdown have remained relatively close to the same between survey years. Whitefish has ticked up by 8% in resident proportion.

Table 110. Resident to Nonresident Proportions by Ski Area.

Ski Area	2009-10		2018-19	
	Resident Proportion	Resident Proportion	Resident Proportion	Nonresident Proportion
Big Sky ¹³	42%	18%	82%	
Bridger Bowl	72%	73%	27%	
Discovery	94%	91%	9%	
Red Lodge	62%	60%	40%	
Showdown	93%	89%	11%	
Whitefish	54%	62%	38%	
Total	65%	57%	43%	

Similar to the 09/10 season, nonresident visitors spent large portions of their group spending on accommodations and lift tickets. In the 09/10 season, these two groups combined for a total of 48% of all spending. In the 18/19 season they combined for even more at 57%. This change is in part driven by the prominence of nonresidents at Big Sky, whose visitors spent 61% of their total group spending on lodging and lift tickets. Among the five other ski areas, Bridger Bowl was comprised of 54% on these two spending categories and the others ranged from 46-49%. In the smaller ski areas, expenditures on restaurants and bars rivaled that of lift tickets.

Lodging changes since the 09/10 season are also evident. In 09/10, 40% of resident and 28% of nonresidents who spent nights in Montana stayed at a hotel or motel. In the 18/19 season, both dropped to 31% and 22% respectively. Meanwhile, rental homes/condos/cabins increased from 9% and 28% for residents and nonresidents to 21% and 34% respectively. Though not asked on the 09/10 survey, 6% of residents and 8% of nonresidents indicated they rented a

¹¹ All 2010 expenditures are displayed in 2019 dollars.

¹² Impact value only accounts for nonresident spending.

¹³ Big Sky acquired Moonlight between the 09/10 season and the 18/19 season.

room in a home/condo/cabin. The 18/19 survey did not directly ask the booking method for homes/condos/cabins, though the prevalence of online booking platforms would suggest that many are booked through AirBnB, VRBO, or similar firms.

Consistent with the 09/10 season, location topped the list of reasons to ski at Montana ski areas for both residents and nonresidents. Over half (51%) of residents listed location as their main reason for skiing where they were, while 25% of nonresidents did so. Reputation for good skiing and recommendations from friends were also high on nonresidents' reasons for visiting, recognized by 19% and 17% respectively. Each ski area's website also showed consistency since 09/10 in ranking at the top of information sources used, if any. Fifty-three percent of nonresidents and 38% of residents identified using those sites. Word of mouth was also routinely noted by residents (27%) and nonresidents (53%).

As evidenced from shifting proportions of residents compared to nonresidents, the importance of the winter season to the larger Montana tourism and recreation economy is increasingly evident. These skiing and snowboarding nonresident visitors support nearly 2,000 jobs that often provide opportunities to round out a calendar for seasonal workers and allow businesses to maintain winter operations where they may otherwise be unable. Though not included here in economic impact estimates, resident skiers and snowboarders support additional jobs in and around the ski areas. The ski areas themselves employ from a low of 65 employees at the smaller areas to in excess of 600 at the larger areas. These jobs cover the gamut from lift operations to accommodations to executives.

Moving forward, periodic proportion counts of residents and nonresidents will allow updating the information contained here and an input to the evaluation of the performance of the state and area partners in attracting continued visitors to Montana.

Appendix A: Survey Instrument

Weather conditions _____ Ski resort _____ Date _____

2018-19 Montana Skier/Boarder Survey

- 1. Are you a resident of Montana? Y / N / Out of State Student (OSS)
If YES, or OSS
a. How many miles away from home (or school) did you travel to get here?
If NO,
b. What are the purposes of your trip to MT? (Check all that apply)
(1)Ski/snowboard (4)Just passing through (7)Other (e.g. medical)
(2)Vacation/recreation/pleasure (5)shopping
(3)Visit friends/relatives (6) Business/convention
c. Of the above, what is your main purpose for being in MT? (enter #)
d. How did you enter MT? auto/truck/RV air train bus
2. Which are you participating in today? skiing snowboarding both
3. What is your skiing ability level? (Display if Q2=skiing or both)
Beginner Intermediate Advanced
4. What is your snowboarding ability level? (Display if Q2=Snowboarding or Both)
Beginner Intermediate Advanced
5. How many members of your group (including yourself) fall within each skiing ability level?
of Beginners # of Intermediate # of Advanced # of non-skiers
6. How many members of your group (including yourself) fall within each snowboarding ability level?
of Beginners # of Intermediate # of Advanced # of non-boarders
7. Why did you decide to visit this resort? (mark all that apply)
(1) Price (7) Reputation for good skiing
(2) Terrain (8) Own condo/home here
(3) Location (9) Auxiliary activities (e.g. zipline,
sledging, snowcoach)
(4) Recommendation from friend
(5) Short lift lines (10) Good Snow
(6) Family friendly (11) Ease of Access
8. Of the above, what is the one main factor for choosing this resort?

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9. What source(s) did you use to find information about this resort? (please check all that apply)
- | | |
|---|---|
| None | Magazine ad/article |
| Word of mouth | Radio ad |
| Ski Area's Website | TV ad |
| Visit Montana Website | Travel or Other Blogs |
| Ski Conditions Website (e.g. onthesnow.com) | Video, YouTube, Podcast |
| Search Engine (e.g. Google) | Other web page |
| Social Media (e.g. Facebook, Instagram) | On-Line Consumer Reviews (e.g. TripAdvisor) |
10. What other ski areas will/did you ski in MT this ski season?
- | | |
|----------------------------|-------------------|
| Bear Paw Ski Bowl | Maverick Mountain |
| Big Sky Resort | Montana Snowbowl |
| Blacktail Mountain | Red Lodge |
| Bridger Bowl | Showdown |
| Discovery Basin | Turner Mountain |
| Great Divide Snowsports | Whitefish Resort |
| Lookout Pass | None |
| Lost Trail Powder Mountain | |
11. Which category best describes your ski travel group? (Please check only one)
- | | |
|------------------|-------------------------|
| Self | Family and Friends |
| Couple | Friends |
| Immediate Family | Business Associates |
| Extended Family | Organized Group or Club |
12. How many total nights are you staying **away from home** but in Montana on this trip? _____
- If overnight (#>0)**
- a. What types of accommodations will you be staying at in MT (please check all that apply):
- Hotel/motel
 - My condo/cabin
 - My 2nd home
 - Rented entire home/cabin/condo
 - Rented a room in a home/cabin/condo
 - Bed & Breakfast
 - Home/condo/cabin of friend/relative
 - This resort's lodge

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13. How many days **on this trip** will you be skiing/boarding in Montana? _____

Next, to help us assess the economic contribution of skiing to Montana's economy, we would like to find out more about your spending in Montana.

14. How many people are in your spending group? (This is the group whose spending is directly connected to yours) _____

15. How many of this group are season pass holders at this resort/ski area? _____

16. Do any members of you group hold season passes at other resorts/ski areas? Y/N
If Yes

a. Please list the other resorts or ski areas where you or a group member hold a season pass _____

17. Did you purchase a ski or travel package **for this trip, at this resort?** Y/N

a. **If YES**, how much was your entire package? \$ _____

b. Package Included:

Lift tickets Car Rental Spa Equipment Rental
 Accommodations Flight Food/Beverage Other (please describe) _____

18. Please estimate all your travel group expenses that will occur while in Montana for this trip. Please do not record expenses if they were already included in your travel package already recorded.

Category

a. Overnight Accommodations	\$ _____	h. Lift tickets	\$ _____
b. Gasoline, oil	\$ _____	i. Permits, fees, admissions	\$ _____
c. Restaurant, bar (incl. tips)	\$ _____	j. Equipment rental	\$ _____
d. Groceries, snacks	\$ _____	k. Snowmobile/snowcoach	
e. MT Transportation fares rental (e.g. shuttles, taxi, Uber)	\$ _____	l. Guided trip (e.g. Snowmobile)	\$ _____
f. Auto/RV rental, repair	\$ _____	Incl. Tips	
g. Retail goods (e.g. souvenirs (gifts, new gear)	\$ _____	m. Lessons (Incl. Tips)	\$ _____
		n. Other service (spa, daycare, etc.)	\$ _____
		o. Other	\$ _____
		(specify _____)	

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

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

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

a. Zipcode if US? _____

21. What is your age?
22. What is your gender? Male, Female
23. What best describes your annual household income in US dollars? (Please check only one)

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