Oregon Skier Profile and Economic Impact Analysis

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Final Report

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A Program of the Community Service Center
at the University of Oregon

ECONorthwest

UNIVERSITY OF OREGON

EDA Economic Development Administration Center

CPW Community Planning Workshop

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About the UO EDC

The University of Oregon Economic Development Center is a partnership between the Community Service Center, the Center for Sustainable Business Practices, the Sustainable Cities Initiative, and UO faculty. The UO Center provides technical assistance to organizations throughout Oregon, with a focus on rural economic development. The UO Center seeks to align local strategies to community needs, specifically with regards to building understanding of the benefits of sustainable practices and providing technical training to capitalize on economic opportunities related to those practices. The EDC is partially funded through a grant from the U.S. Department of Commerce, Economic Development Administration.

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Summary

EXECUTIVE SUMMARY

This report presents an analysis of the economic impacts of the Oregon ski[1] industry for the 2010-11 season. The results are based on a survey of 874 skiers/snowboarders at Oregon ski areas during the 2011-12 ski season. The survey gathered a broad range of data, including participation patterns, shopping patterns, on- and off-mountain expenditures, and ski vacations. ECONorthwest completed the economic impact analysis using the IMPLAN model.

A report of this kind has not been completed since 1989. The Community Planning Workshop's *Oregon Skier Profile: 1988-89 Season* estimated the industry generated $152 million in direct economic impact with about 1.5 million skier visits. This amount would be the about $282 million in 2012 dollars.[2]With 2010-11 skier visits in Oregon reaching 1.9 million, CPW estimates the ski industry generates $311 million in direct economic impact and a total economic impact of $482 million.

Estimated Economic Impacts

Total economic impacts associated with the Oregon ski industry for the 2010-11 season topped $481.6 million, including direct expenditures, indirect spending (such as retail or equipment purchases), and induced economic impacts (including personal income). **The Oregon ski industry provides an estimated 6,772 jobs and over $194.4 million in personal income (Table 1).**

Table 1. Total economic impacts of the ski industry in Oregon, 2010-2011 season

Impact Measure	Total	Multiplier
Economic Output	$481,620,000	1.9
Personal Income	$194,383,000	1.8
Jobs	6,772	1.4

Sources: ECONorthwest using IMPLAN and skier expenditure data from the University of Oregon Skier Survey, 2010-2011 ski season.

Direct expenditures are directly tied to skier visits (e.g., visits to the mountain), with the average skier spending $88.86 on both on- and off-mountain purchases per visit. Indirect economic impacts include goods and services purchased by businesses that accommodate the direct spending of skiers commonly referred to as "supply-chain" impacts. Induced impacts, commonly referred to as "consumption-driven"

[1] The terms "ski," "ski/snowboard," and "snowsport" are used interchangeably to talk about the overall snowsport industry and people that participate in snowsports in this report.

[2] $152 million (1989 dollars) = $281.71 million (2012 dollars).

impacts, include those economic implications of individuals gaining purchasing power thus inducing more spending. Taken together, these economic impacts total $481.6 million.

Oregon ski areas serve both day and destination skiers; those who drive to the resort and ski for a day, returning home that same evening, and those who travel to a ski area to stay one or more consecutive nights away from home for the purpose of participating in snowsports over the course of those days.

Day visitors to Oregon ski areas represent approximately 78% of total skier visits annually while destination visits account for approximately 22% of total skier visits to Oregon ski areas. **Based on the number of total skier/snowboarder visits (1.9 million) during the 2010-11 season and the average visitation of the Oregon skiers, CPW estimates day visitors represented over 1.56 million skier/snowboarder visits. Destination visits represented just over 403,000 skier visits during the 2010-11 season**.

Of the $311.2 million in direct revenue generated by the ski industry, approximately $138.7 million is generated by day skier spending. While destination skiers account for only 22% of skier visits, they generated 40% of direct economic impact—nearly $123 million. **Destination skiers spend considerably more per person per day—about $300 compared to $89 for day skiers.**

Table 2. Estimated total direct ski spending, by expenditure category, 2010-2011 season

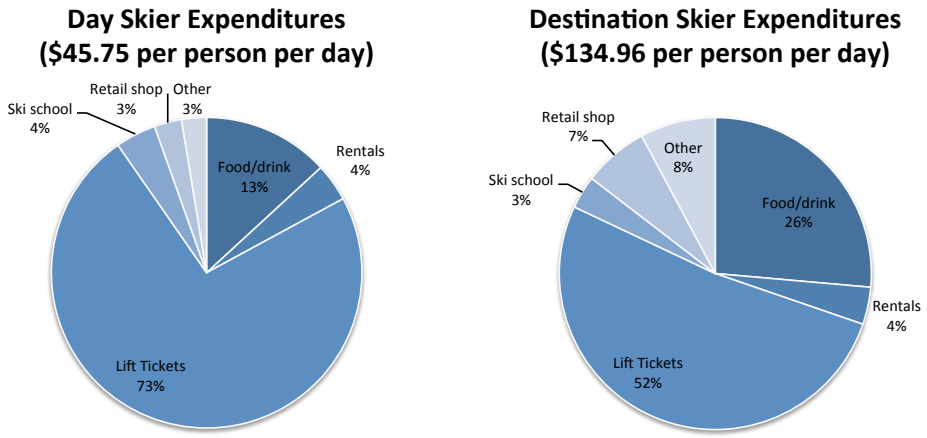
Expenditure Category	Total Spending	Percent of Total
Ski equipment	**$49,586,902**	**16%**
Day skiers		
Off mountain	$67,272,925	22%
On mountain	$71,435,384	23%
Total day skiers	**$138,708,310**	**45%**
Destination skiers		
Off mountain	$68,472,107	22%
On mountain	$54,477,061	18%
Total destination skiers	**$122,949,168**	**40%**
Total all categories	**$311,244,379**	**100%**

Source: University of Oregon Skier Survey, 2010-2011 ski season

Total fiscal impacts of the Oregon ski/snowboard industry in 2010-11 were just under $40 million. Fiscal impacts include business taxes incurred during production; personal income taxes; social insurance (employer and employee contributions) taxes; and various other taxes, fines, licenses, and fees paid by businesses and households.

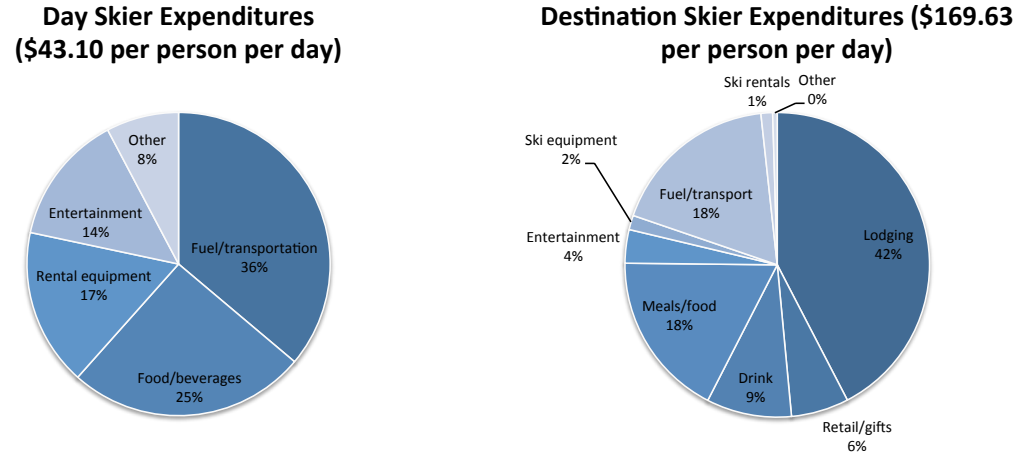
Approximately 52% of day skiers' spending occurs at on-mountain locations. Their largest expense is typically purchasing of lift tickets, as shown in **Figure 1**. Destination skiers tended to focus their on-mountain spending on food, retail, and other items.

Figure 1. On-Mountain Expenditures of Day and Destination Skiers, 2010-11 Season



Without significant base area development in Oregon, visitation tends to spur economic corridors along travel routes from population centers. **Day skiers reported spending nearly 36% of their off-mountain expenditures on transportation as the average Oregon skier or snowboarder travels roughly 68 miles to the ski area by car. Destination skiers generate more total expenditures off the mountain on services that support the ski industry. Their largest expense is typically lodging (42%) with both transportation costs (18%) and meals (18%) accounting for the majority of their off-mountain spending.** CPW estimates that destination skiers spend nearly three times as much as day skiers, per person.

Figure 2. Off-Mountain Expenditures of Day and Destination Skiers, 2010-11 Season



CPW compared the demographic and socio-economic characteristics of survey respondents with national studies conducted by the National Ski Areas Association (NSAA) and concluded the sample data is representative of the characteristics of Oregon skiers.

Ski Equipment Shopping Trends

Respondents prefer to purchase lift tickets and season passes on the Internet. The preferred place for respondents to purchase lift ticket/season passes is the Internet (53%) followed by on the mountain (37%). Almost half of the survey respondents said they had a season pass.

Snowsport equipment purchases were influenced mostly by performance, followed by price and brand. Peer reviews were by far the most influential on respondents' equipment purchases, with magazines, vendor websites, online publications, and retailer notifications reported as second-tier influences.

Digital media, such as mobile applications, prove most influential to respondents when making purchases and checking snow or weather conditions. Ski area websites are the most commonly visited source (77%) for weather information, followed by the weather forecast (64%), and then the Department of Transportation (37%). More respondents said they were signed up for alerts from REI than any other digital retailer or skiing/snowboarding alert service.

Ski equipment and accessories contribute significantly to direct economic impacts of the snowsports industry. **Each respondent reported spending an average of $277 dollars on ski equipment and accessories, totaling over $49 million in direct revenue**. As shown by Table 3, the majority of each person's spending was the purchase of a ski or snowboard (41%), however clothing accounted for nearly $80 per person (28%).

Table 3. Spending on ski equipment and accessories, 2010-2011 season

	Total Expenditures	
Category	Dollars	Percent
Skis/Snowboard	$ 20,129,338	41%
Boots	$ 8,641,605	17%
Clothing	$ 13,962,716	28%
Accessories	$ 5,110,408	10%
Rentals	$ 1,742,835	4%
Total	**$ 49,586,902**	**100%**

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Manufacture of snowsports equipment makes significant economic contributions, but estimating the economic impacts is difficult. The Oregon Business Plan identifies the Athletic and Outdoor Industry as a robust and promising business cluster in the state of Oregon. Athletic &Outdoor Gear and Apparel encapsulates equipment needed for participation in a variety of outdoor sports, including skiing and snowboarding. Twenty-seven member companies of Snowsports Industries of America are based or have locations in Oregon, in addition to high-profile brands such as Nike, Adidas, and Columbia who each contribute enormously to the snowsports market. Oregon's Athletic & Outdoor Gear and Apparel cluster is comprised of over 300 firms, employing over 14,000 Oregonians. Additionally, the cluster captures about 3,200 self-employed individuals with sales totaling approximately $100 million annually.[3] Data cannot be disaggregated, however, to derive conclusive information regarding economic impact of the companies represented by this cluster specifically for snowsports-related manufacturing. For this reason, the economic values captured by this study are based on direct, indirect, and induced economic activity as reported by respondents and the modeled implications of their activity. **Additional study of Oregon-based snowsport product manufacturers is necessary to accurately ascertain the true impact of manufacturing on the economy of Oregon.**

Snowsports Industry Trends

Snowsports have developed into a strong recreational industry in the United States over the past seventy-five years, and have gained particular notoriety in the Pacific Northwest. Reporting 60.5 million skier visits nationally in 2010-11, the National Ski Area Association noted 2010-11 as a record season. **Snowsports participation in the Pacific Northwest accounted for an estimated 7% of national visits**. Snowsports Industries of America (SIA) reports 11.5 million skiers and snowboarders participated during the 2010-11 season, while an additional 10 million individuals consider themselves skiers but did not participate during that season. A higher rate of growth was experienced in the Pacific Northwest region as compared to other regions of the country, posting a nearly 4% increase in skier visits from the 2009-10 season.

Despite a rosy outlook when reviewing current skier visit and economic trends, the ski and snowboard population is aging without a substantial base of new skiers and snowboarders to fill their boots. NSAA reports that beginner skiers and snowboarders are in short supply, while the National Sporting Goods Association notes significant decline of youth participation in snowsports. **Respondents captured in this study exhibited similar characteristics as national studies; more than half of skiers reporting having over 20 years of snowsport experience**. Seventy-

[3] Cortright, Joseph. Impresa Economics, "Athletic and Outdoor Industry Cluster: A White Paper" 2010.

five percent of respondents indicated that they were intermediate, advanced, or expert skiers.

Though the Pacific Northwest sees a higher percentage of snowboard visits than other regions of the country, NSAA reports the snowboarding boom has ended with snowboard participation growth leveling off. Snowboarding, however, remains a "gateway" for new participants to snowsports, encouraging newcomers to enjoy the snow on a variety of different planks. **In Oregon, skiing remains the most common snowsport respondents participated in during the 2010-11 season (61%), with snowboarding (38%), and snowshoeing (18%) remaining popular as well.** Twenty-two percent of respondents indicated being beginner snowboarders, while 28% of respondents were beginner cross-country skiers.

SIA reports that during the 2010-11 season nearly 24% of skiers also rode a snowboard. Of skiers surveyed by SIA, 11% also telemark, 18% of skiers also cross country ski, and 16% also snowshoe. **Oregon respondents, on average, participated in two different disciplines of snowsports, with some participating in up to seven different snowsports.** The crossover of snowsports has begun to blossom with the proliferation of twin-tip, reverse cambered skis and snowboards and interest in alternative backcountry experiences such as snowshoeing and cross-country skiing. To add, skiers are exploring the backcountry, accessible from 75% of the Pacific Northwest's ski areas. Touring equipment for skis, particularly boots and bindings, saw a 126% and 95% increase, respectively, from the previous year's sales. **Nearly 29% of respondents spent at least one day backcountry skiing or snowboarding during the 2010-11 season, 8% skiing more than 10 days on non-lift served terrain.**

February is the most popular month to ski or snowboard in Oregon. The average skier/snowboarder spends 5.2 hours on snowsports per snow activity day. More than half (52%) of respondents' ski visits occurred on weekends, and nearly half of respondents noted skiing and snowboarding with friends.

Larger resorts in Oregon still draw crowds. Mt. Hood Meadows was the most commonly visited ski area by respondents (62%), followed closely by Mt. Bachelor (59%), though Mt. Bachelor garnered the most (38%) of votes for favorite destination in Oregon.

Table 4. Fast Facts about Oregon Skiers

Fast facts about Oregon Skiers	
Average Distance Traveled (one way)	68 miles
Average Days Skied by Season Pass Holders	20
Average Days skied by Non-Season Pass holders	6
Median Age of Respondent	40
Percent who Own Equipment	91%
Average Household Income	$ 91,228
Marital Status	
Married	62%
Single	38%
Professional	28%
Typical Occupations	
Self-employed	11%
Student	10%
Earned a college degree or higher	67%
Percent holding more than 1 season pass in Oregon	9%

Note: the age of survey respondents ranged from 9 to 82 years

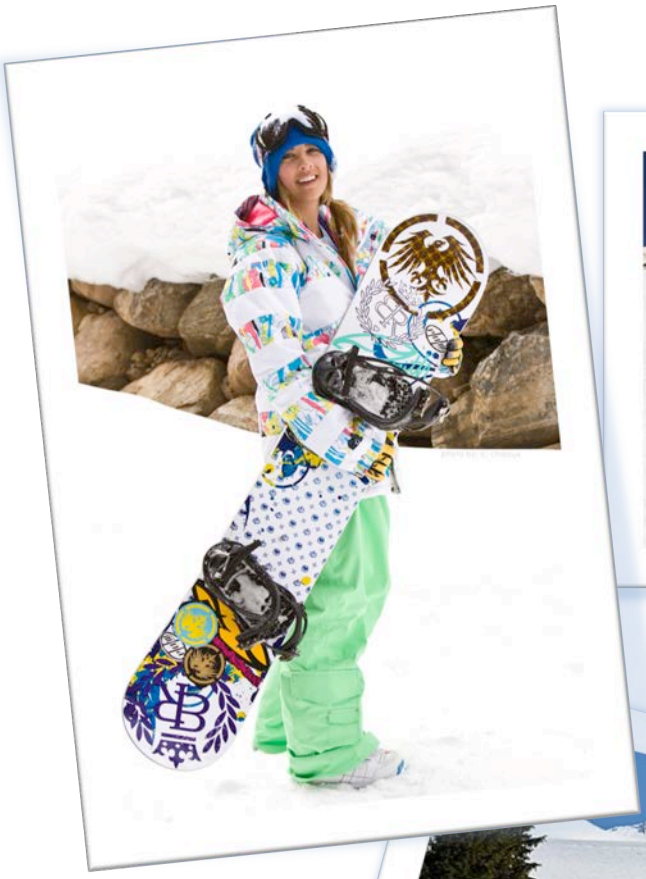
Conclusion

Oregon ski areas provide a unique experience. The distinctive nature of the Southern Cascades, both in dramatic weather patterns and stately beauty, make for deep snow cycles and guarantee one of the longest ski seasons in the nation. Unlike ski areas in other parts of the country, Oregon skiing has retained its traditional sense of place and purpose, remaining dedicated to the adventure of outdoor winter recreation. In the absence of base area development, Oregon's ski industry can still claim mountains and snow conditions as its primary products. Set apart from ski experiences in the Rockies or the Northeast, Oregon remains true to its roots, as a brand of skiing all its own.

The ski industry is a significant economic driver of the Oregon travel and recreational economy contributing to local, statewide, and regional markets. Beyond revenue, ski areas support local economies by providing employment opportunities, while drawing visitors from great distances to support associated secondary and tertiary businesses. This report is not intended as a marketing strategy for Oregon ski areas, but rather provides data regarding the measurable impact that skiing makes on Oregon's economy as well as data that are useful to develop marketing strategies. The results of the survey and economic impact analysis make clear that the ski industry is a valuable asset that has significant potential to add value to Oregon's already rich outdoor recreational market.

Chapter 1:

Introduction



CHAPTER 1: INTRODUCTION

This report presents an analysis of the economic impacts of the Oregon ski industry for the 2010-11 season. The results are based on a survey of 874 skiers/snowboarders at Oregon ski areas during the 2011-12 ski season. The survey gathered a broad range of data, including participation patterns, shopping patterns, on- and off-mountain expenditures, and ski vacations. ECONorthwest completed the economic impact analysis using the IMPLAN model.

Background

In 2010, nearly 21.2 million Americans identified themselves as skiers or snowboarders, however almost 10.5 million more did not participate that season but still considered themselves skiers or snowboarders.[4] With 60.5 million skier visits recorded nationally in 2010, 1.9 million of those in Oregon alone (Kottke Report, 2011), snowsports participation rates continue to grow. The snowsports industry, in kind, has maintained growth despite the economic downturn. Despite this somewhat encouraging news, other factors such as skier age, new skiers, and lessons suggest the industry faces challenges in the near-term future.

Skiing in Oregon can be traced as far back as 1926, stemming primarily from immigrants of Norwegian heritage.[5]Historians credit the publicity and nation-wide reach of the first North American Winter Olympics 1932 at Lake Placid, New York with the popularization of recreational downhill skiing in North America.[6] The construction of the Timberline Lodge not more than five years later in 1937 on Mt. Hood solidified skiing's place in Oregon's cultural history. The installation of Oregon's first ski lift at Anthony Lakes in 1938 would mark the beginning of an era of ski area growth in Oregon that paralleled nationwide expansion of ski areas into the early 1980s. The ski industry would continue to grow, generating an average of about 52 million skier visits annually throughout the nation by the year 2000, the Pacific Northwest alone capturing an average of approximately 3.6 million of those skier visits annually. During the 2010-11 season, Oregon skier visits represented just over 3% of skier visits nationally.

Nearly 90% of ski areas in the western United States are operated on public land under special use permits from the USDA National Forest Service (USDA-FS). In Oregon, eleven out of twelve resorts open during the 2010-11 season operated on 17,048 acres of public land administered

[4] Snowsports Industries of America, "SIA Executive Summary" 2011, P.5.
[5] Grauer, Jack. *Mount Hood: A Complete History: Exciting Story of America's Most-Climbed Mountain*. S.l.: Grauer, 1975. Print.
[6] New England Ski Museum," http://www.skimuseum.org/page.php?cid=doc109; Dawson, Louis. "Chronology of North American Ski Mountaineering and Backcountry Skiing," http://www.wildsnow.com/chronology/timeline_table.html.

by the USDA-FS. Without land exchanges that enable ski areas to build and develop on privately held "fee simple" land, there are few opportunities for base area development at Oregon ski areas. As a result of this alternative pattern toward ski area land use, ski areas in Oregon often spur corridor development according to day use travel patterns. Communities such as Oakridge, Bend, Sandy, Hood River, Baker City, and others provide "gateways" to Oregon ski areas, influencing a diffusion of skier dollars to businesses either in these population centers or on routes to the ski area.

Purpose and Methods

It has been more than two decades since the last comprehensive economic impact assessment of the Oregon ski industry.[7]More recent studies have addressed the supply of snowsports opportunities in the Pacific Northwest,[8] while other studies such as the Kottke *End of Year Survey* account for demand of skiing in the state on an annual basis.[9] Though relevant, results of existing studies often focus on regional-level data, without providing enough differentiation of the Oregon snowsports market.

By contrast, this study draws on regional and national information context for results specific to Oregon. To provide information unique to Oregon, this study documents the participation trends, purchasing behaviors, preferences, and perceptions of Oregon skiers and snowboarders. The purpose of this report is to:

- Provide a snapshot of Oregon skier/snowboarder demographics
- Describe participation trends
- Summarize visit characteristics, media resources/influences, and expenditure patterns
- Analyze direct, indirect, and induced economic impacts of snowsports in Oregon in terms of total receipts, employment, payroll, and taxes
- Analyze perceptions of ski areas in Oregon as they relate to sustainability

The foundation of this study was a survey of 874 skiers/snowboarders during the 2011-12 season. Table 1-1 summarizes responses by the resort most frequently visited by the respondent.

[7] Many of these studies were completed by the Community Planning Workshop, including *Oregon Ski Economics* (1987-88 Season, 1991-92) and the *Oregon Skier Profile*, 1988-89 season.
[8] Snowsports Industries of America, SIA Intelligence Report, 2011.
[9] National Ski Areas Association, *Kottke End of Year Report*, 2011.

Table 1.1. Survey responses by ski area most frequently visited

	Survey Responses		2010-11 Visits	
Ski Area	Number	Percent	Number	Percent
Anthony Lakes	3	0.4%	24,528	1.2%
Cooper Spur	1	0.1%	9,214	0.5%
Hoodoo	120	14.3%	85,077	4.3%
Mt. Ashland	24	2.9%	78,708	4.0%
Mt. Bachelor	159	18.9%	489,572	24.9%
Mt. Bailey (snowcat)	0	0.0%	426	0.0%
Mt. Hood Meadows	306	36.3%	469,926	23.9%
Mt. Hood Skibowl	50	5.9%	400,000	20.4%
Spout Springs	0	0.0%	10,986	0.6%
Summit (n-m)	0	0.0%	nr	-
Timberline	123	14.6%	340,657	17.3%
Warner Canyon	0	0.0%	3,200	0.2%
Willamette Pass	56	6.7%	52,389	2.7%
Total	**842**	**100.0%**	**1,964,683**	**100.0%**

Note: 842 of the 874 survey respondents answered this question. Data from the 2011-12 season were not available at the time this report was completed. Warner Canyon did not operate during the 2011-12 season. NR = not reported

Organization of this Report

The remainder of this report is organized as follows:

- **Chapter 2** describes national and regional trends of the snowsports industry related to participation and expenditures.
- **Chapter 3** details the characteristics of Oregon skiers and snowboarders.
- **Chapter 4** describes characteristics of Oregon ski visits, both of day and destination skiers and snowboarders.
- **Chapter 5** provides information regarding ski-related expenditures including shopping patterns and media influences.
- **Chapter 6** extrapolates the direct, indirect, and induced economic impacts generated by the snowsports industry in Oregon using an IMPLAN model.
- **Chapter 7** discusses the perceptions Oregon skiers and snowboarders have of the role of Oregon ski areas as it relates to sustainability.

This study also contains the following appendices:

- **Appendix A: Survey Methodology** describes the process CPW used to develop and administer the survey and the sampling methods.
- **Appendix B: Survey Instrument** presents a copy of the survey instrument.
- **Appendix C: Economic Impact Methods** describes the methods ECONorthwest used to estimate economic impacts.
- **Appendix D: Transcript of Survey Comments** presents comments respondents provided to open-ended survey questions.

CHAPTER 2:

THE SKIING MARKET

CHAPTER 2: THE SKIING AND SNOWBOARDING MARKET

The snowsports industry is defined as all establishments that generate revenue through snowsports or snowsport related activities. Using this definition the snowsports industry includes:

- Ski areas
- Snowsports specialty shops
- Support services
- Ski area suppliers
- Snowsports equipment manufacturers
- Affected state and federal agencies

Each of these establishments are tied to ski industry activity in direct or indirect ways. The industry as a whole can be understood as the "supply-side" of the skiing market, providing goods and services to those who participate in snowsports. Skiers and snowboarders represent the demand-side of the market as the consumers of these goods and services. The skiing market exists where supply intersects demand.[10]

Data are collected by a number of national-level organizations regarding the size, nature, and character of the snowsports industry. National and regional level data provide context and an understanding of trends in both the ski industry and skier/snowboarders populations beyond the state of Oregon. An overview of the snowsports market provides valuable information affecting trends in snowsports at a regional and state level.

The National Snowsports Market

The snowsports market accounts for a significant share of the recreation industry in the United States. Snowsports activities have, over the last half-century, created a unique industry of goods and services that reach 21.5 million Americans (approximately 7% of the population of the U.S.).[11] Recreation remains a national past time, supported by public lands managed by the USDA-FS and other federal entities. Based on data collected by the most recent U.S. Economic Census, the recreation industry grew by 33% between 2002 and 2007.[12] Growth by the snowsports industry has been more modest, averaging about 2% growth in sales[13] and 1% growth in skier visits over the last decade.[14] Growth in

[10] Community Planning Workshop. "Oregon Skier Profile: 1988-89 Season" 1989.
[11] SIA Snowsports Intelligence Report, 2011, p2.
[12] U.S. Census, EC0200CBDG1 Core Business Statistics, 2002; EC0771A1 Geographic Area Series, 2007.
[13] Snowsports Industries of America, "SIA Snowsports Fact Sheet." Accessed 25 June 2012. http://www.snowsports.org/SuppliersServiceProviders/ResearchSurveys/SnowSportsFactSheet/.
[14] NSAA, 2011, Based on Table 6, p.15.

visitation was experienced in all regions of the country, most notably in the Pacific Northwest (3.9% growth in skier visits).[15]

Recreation use accounts for nearly 94% of all visits to national forests in the U.S. According to the USDA-FS, Just over 19% of visits to national forests and wilderness areas are for the purpose of downhill or cross-country skiing.[16] For many, snowsports such as skiing and snowboarding are the primary outdoor recreational opportunities during the winter months.

The snowsports industry continues to grow. Snowsports sales hit an all-time high of $3.295 billion during the 2010-11 season.[17] Among retailers, specialty shops maintain the largest share of the market, which sold nearly $2 billion in snowsports products during the 2010-11 season. Internet sales continue to challenge chain stores for the remainder of the retail market, with Internet sales edging out chain stores by about $28 million.[18] These values represent an average of 8% increase in units sold, and a 13% increase in revenue over the 2009-10 season.

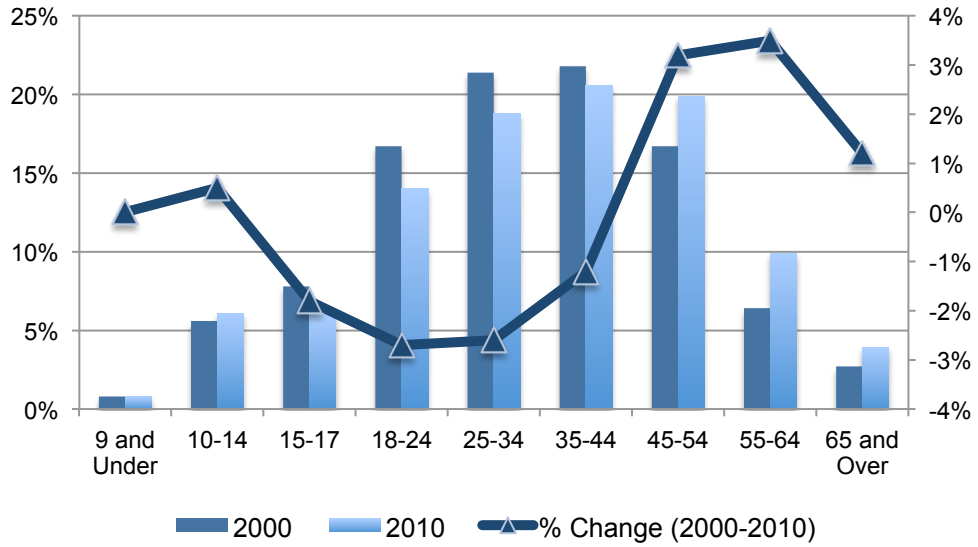
Demographic trends

Analysis of national skier and snowboarder demographics provides a profile of the average American snowsports participant. The most recent National Ski Area Association demographic profile suggests that the average age of snowsports participants is increasing, reporting the median age of participants as 37 (up from 32 in 1997-98). About 46% of skiers and snowboarders are under the age of 35. The median age of alpine skiers alone has risen over the past decade from 40 to 43 years old (NSAA, 2010).

As shown in **Figure 2-1**, the largest growth of any age bracket has occurred in skiers and snowboarders age 45-54 over the past decade, with a significant decline of participants age 15 to 34. NSGA's analysis of youth participation in snowsports shows a decline over the last decade of approximately 28% among all participants under 17, with a notably greater decline in participants between the age of 12 to 17.[19]

[15] NSAA, 2011, p.17.
[16] National Forest Service, "National Visitor Use Monitoring Report," Fiscal Year 2009, p. 9-17.
[17] SIA, 2011, p. 8.
[18] Internet represents about $652 million and chain stores represent about $624 million in retail sales. Snowsports Industries of America "SIA Intelligence Report" p.8.
[19] National Sporting Goods Association, as referenced in "2010-1014 SCORP: Appendix B – Outdoor Industry Trends"
http://www.emnrd.state.nm.us/PRD/scorp/documents/AppendixB-OutdoorRecreationIndustryTrends.pdf

Figure 2-1. National age distribution change of snowsport participants, 2000-2010



Source: National Ski Areas Association, 2010.

Parallel to the increase in average skier age, the average years of experience in snowsports continues to rise. Skiers report having 20 years of experience or more has grown from 34% in 2002 to nearly 43% in 2010.[20] By contrast, those skiers and snowboarders who report being new to the sport or having less than four years of experience has declined (slightly less so in snowboarding than in skiing). Rates of new skiers in lessons reflect a similar trend.

Skiing and snowboarding attracts more men than women, alpine ski participants maintaining a 60% male, 40% female split. Snowboarding attracts closer to a 66% male 34% female split.[21] This ratio has remained constant over the past decade.[22] This proportion is consistent with USDA-FS outdoor recreation participation gender ratios.[23]

Snowsports Industries of America (SIA) 2010 *Snowsports Intellegence Report* states that about 10% of skiers are Latino, about 12% are Pacific Islander, with individuals of African American descent representing another 5%.[24] The highest levels of racial diversity in the ski industry exist in the Pacific Southwest, the Southeast, and the Pacific Northwest.[25]

Economically, snowsports participants tend to be fairly affluent, with 62% skiers have a household income that exceeds $75,000.[26] Only 25% of

[20] NSAA, 2010, p.29
[21] SIA, p. 28
[22] NSAA, 2010, p.12.
[23] National Forest Service, "National Visitor Use Monitoring Report," 2009. P.10,
[24] SIA p. 32,
[25] NSAA, 2010, p.13.
[26] SIA p. 31.

skiers report household incomes of $50,000 or less.[27] Snowsports participants also tend to be well-educated. Approximately 56% of skiers have received a Bachelor's Degree or higher.

Snowsports Participation

Participation in snowsports has maintained growth at the national level. Skier visits nationally have fluctuated over the last decade, experiencing a low during the 2001-02 season of approximately 54.4 million skier visits and an all-time high in both 2007-08 and 2010-11 of 60.5 million skier visits. According to the preliminary 2011-12 Kottke End of Season Survey, the U.S. ski industry experienced its most challenging season since 1991-92, when 50.8 million visits were recorded. The 2011-12 season was also marked by the lowest national average resort snowfall since 1991-92, the second-lowest snowfall in 21 years of available data.[28]

Similarly, the National Sporting Goods Association reported growth in the snowsports industry through the 2010-11 season. With only twelve sports showing positive participation trends, both alpine skiing and snowboarding reported increased participation since 2006.[29] Alpine skiing grew nearly 16% while snowboarding reported a 17% increase in participation. In a separate category of NSGA's research of "smaller sports" (under 10 million participants), cross-country skiing increased in popularity 19.5% to reach nearly two million participants nation-wide.

During the 2009-10 season, the average skier skied 7.4 days.[30] Of the 11.5 million active skiers in America, nearly 9.2 million reported skiing two days or more, with nearly 2.7 million skiing nine days or more. Nearly 8.2 million Americans participated in snowboarding in 2009-10, approximately 6.9 million boarded at least two days, 2.7 million boarded nine days or more.[31]

Beyond the 21 million Americans participating in snowsports during the 2010-11 season, an additional 10 million Americans identify as skiers.[32] This group can be considered a pool of "potential" skiers, as their identification suggests they wish to participate again. Season passholders nationally tallied an average of 32 days on snow; approximately 88% of these visits are captured by the pass holding resort.[33]

Snowsports participants often cross disciplines. According to information collected by SIA, the proliferation of reverse-cambered, wide skis attracted nearly one third of snowboarders to skiing in 2010. Conversely,

[27] NSAA, 2010, p.14.
[28] http://www.nsaa.org/nsaa/press/1112/2012-Kottke-Prelim.pdf
[29] Bruce Hammond, Director of Marketing & Communications "NSGA Sports Participation in 2010 Survey Released" June 9, 2011, http://www.nsga.org/i4a/pages/index.cfm?pageID=4492.
[30] SIA, 2011 p.25.
[31] SIA 2011, p.100.
[32] SIA Intelligence Report Executive Summary, p. 3.
[33] NSAA, 2010, p. 37.

about 24% of skiers also rode a snowboard in 2010. Of alpine skiers surveyed, 11% also telemark, 18% of skiers also crosscountry ski, and 16% also snowshoe.[34] Though snowboarding still provides "gateway" opportunities to bring newcomers to snowsports, only conservative growth has been experienced in recent years, maintaining popularity mostly in individuals younger than 34.[35] As of 2011 snowboarding has plateaued at the national level, and has "trended down over the past three to four seasons" in the Pacific Northwest.[36]

Skiers are seeking snow experiences beyond the boundaries of the ski area, namely in the backcountry. SIA reports nearly 22% of skiers visiting the backcountry during the 2010-11 season, predominately immediately adjacent to ski area boundaries.[37] Sales of backcountry boots and bindings skyrocketed in 2010-11, posting a 126% and 95% increase, respectively, from last year's sales.[38]

Finally, Skiers and snowboarders are taking fewer destination trips to participate in snowsports. Though the day to overnight visitation mix remains constant nationally at 49% day visitors and 50% overnight visitors nationally, the number of destination visitors has dropped in terms of overnight "paid accommodations."

The Pacific Northwest

The Pacific Northwest's unique geography of significant vertical relief and intense snow events makes for a lengthy snowsport season and ample recreational opportunity. Host to both year-round and seasonal recreational opportunities, the Pacific Northwest region's four-year average season lasted 133 days, with select ski areas remaining operational for snowsports year-round. Between the 2007-08 and 2010-11 seasons, the region experienced a four-year average of just over 450 inches of snow, the highest in the nation.[39]

The Pacific Northwest had its third-best season in 16 years in 2010-11, reporting nearly 4.04 million skier visits, up from its 3.63 million skier visit average by about 11%. Snowsports participation in the Pacific Northwest accounted for an estimated 7% of the total skier visits in 2010-11.[40]

Typically advanced-ability skiers, ski area patrons of the Pacific Northwest have historically skied "close to home," participating in skiing and snowboarding within their home region. According to the latest National Ski Area Association Demographic report of the 2009-10 season, day ski visits were up in in the Pacific Northwest.[41] Day skiers contribute the

[34] SIA Snowsports Participation Survey from the Physical Activity Council Study 2009-2010, p.29.
[35] NSAA, p. 35.
[36] NSAA, Kottke End of Year Survey, p. 37.
[37] SIA 2011, p.37
[38] SIA 2011, p.185
[39] NSAA, 2011, p. 20.
[40] NSAA, 2011, p.14.
[41] NSAA Demographic Report, p. 22.

largest share of skier visits in the Pacific Northwest, representing nearly 84% of total visitation.

Just over 37% of skiers and snowboarders visit Pacific Northwest ski areas on weekdays, while the remaining 63% typically visit on weekends and holidays.[42] The Pacific Northwest region saw just under 16% of skier visits contributed by destination skiers during the 2010-11 season; this was the highest share of destination skiers in the Pacific Northwest in the past five years.

Pacific Northwest resorts offer a variety of additional snowsports opportunities. Nearly 16% of skier visits in the Pacific Northwest are attributable to night skiing activities.[43] Many ski areas in the region incorporate cross-country skiing, snowshoeing, and tubing into their area's activity list. Nine of Oregon's operating ski areas have night skiing opportunities. Approximately 75% of ski areas in the Pacific Northwest allow backcountry access, the highest ratio in the nation.[44] Many ski areas provide access via specified backcountry gates and trailhead access points.

Season passholders have increased their market share of total visits.[45] Pacific Northwest ski areas sell on average a total of 13,670 season passes annually.[46] Season pass holder visits account for nearly 52% of skier visits. At the national level, season pass holders average 11 days of skiing.

Youth under 17 years of age account for approximately 32% of skier visits in the Pacific Northwest, comprising over half of visits at smaller resorts.[47] Larger resorts tend to have a smaller representation of youth participants.

Only about 4.7% of revenue generated by Pacific Northwest ski areas is attributed to non-winter operations. This is significantly less than the average across the nation of 8.9% of revenue from non-winter operations.

The Oregon Ski Market

Recreation accounts for about 14% of all day trips and 9% of all overnight trips taken in the state of Oregon.[48] Earnings at the state level recovered from a three-year low to reach $315.2 million in revenue attributable to arts, entertainment, and recreation in 2011. The state saw an additional

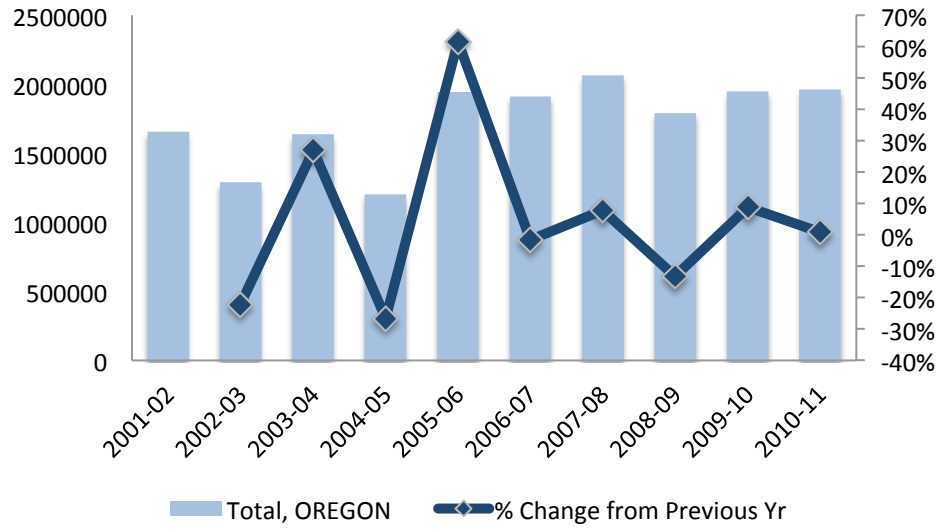
[42] NSAA Kottke Report, p. 32.
[43] NSAA, 2011, p. 47.
[44] NSAA Kottke Report, p. 71.
[45] NSAA, p. 29.
[46] NSAA, p. 59
[47] NSAA, 2011, p. 41.
[48] Travel Oregon. "Oregon Travel Study," State, Regional, and County Detail Estimates: 1991 - 2011p, Dean Runyan Associates.

$226.7 million in retail activity during 2011.[49] Visitors traveling to Oregon make a significant contribution to the state's economy.

Oregon's winter travel economy is limited primarily to mild-weather coastal attractions and snowsports throughout the Southern Cascade Range. Skiing and snowboarding have been the primary drivers of the snowsports economy in Oregon and North America for the last 75 years. Unique to Oregon ski areas is a notable absence of base area development. Oregon ski areas have spurred corridor development according to day use travel patterns. Communities such as Oakridge, Bend, Sandy, La Grande, and others provide "gateways" to ski areas, influencing a diffusion of skier dollars to businesses either in these population centers or on routes to the ski area. With the passage of the Ski Area Recreational Opportunity Enhancement Act of 2011, Oregon ski areas will likely increase summer and shoulder season activities.

Oregon has seen some similar participation trends over the last decade, as described in **Figure 2-2**.These trends tend to vary based on a number of factors, however weather (particularly snowfall) is a strong predictor of Oregon skier/snowboardersnow participation, year over year.

Figure 2-2. Annual visits in Oregon and percent change by season, 2001-02 to 2010-11



Source: Pacific Northwest Ski Areas Association, 2011.

[49] Dean Runyan Associates "Oregon Travel Impacts." Accessed 22 June 2012. http://www.deanrunyan.com/ORTravelImpacts/ORTravelImpacts.html#app=f24&2546-selectedIndex=2.

Key Findings

- National trends show that average skier age and years of experience continue to rise.
- Snowboarding has plateaued nationally, but maintains a youthful core group of participants.
- Crossover is common: About 24% of skiers also rode a snowboard in 2010.
- During the 2010-11 season, alpine skiers reported that they also telemark (11%), Cross-country ski (18%), and snowshoe (16%).
- The Pacific Northwest's four-year average season (2007-08 to 2010-11) lasts 133 days, with select ski areas remaining operational for snowsports year-round.
- The Pacific Northwest region saw a four-year average (2007-08 to 2010-11) of just over 450 inches of snow, the highest in the nation.
- Snowsports participation in the Pacific Northwest accounted for an estimated 7% of the total skier visits nationally in 2010-11.
- Nine of Oregon's operating ski areas have night skiing opportunities, which contribute about 16% of skier visits in the Pacific Northwest.
- Approximately 75% of ski areas in the Pacific Northwest allow backcountry access, the highest ratio in the nation.

CHAPTER 3:

CHARACTERISTICS OF OREGON SKIER/SNOWBOARDERS

CHAPTER 3: CHARACTERISTICS OF OREGON SKIERS AND SNOWBOARDERS

This chapter provides an overview of the general characteristics of survey respondents—a "typical" person[50] that skis, snowboards, or participates in snow-sport activities in Oregon. In addition, it also includes some characteristics about households and snowsport groups, as well as in-depth information about individuals. It describes respondent characteristics including participation patterns and rates, ability levels, travel characteristics, ski visit characteristics, and more. The characteristics of respondents (also referred to as skiers/snowboarders) impact market demand for ski and snowboarding recreation. Understanding the characteristics of the typical skier/snowboarder in Oregon will help the ski and snowboard industry respond to the market demand.

Demographic Characteristics

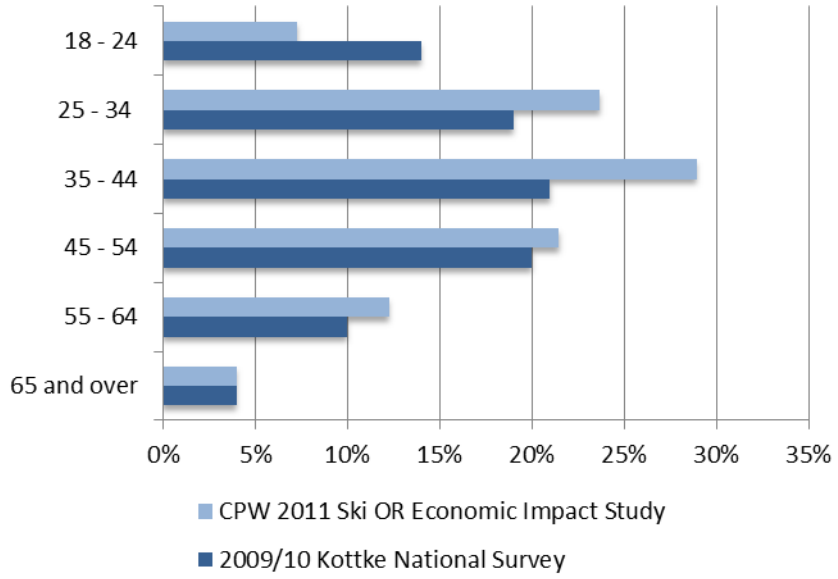
Participation by sex is weighted towards males—59% of respondents were males, compared to 41% females. This data parallels national-level results obtained by NSAA of similar proportions mentioned in Chapter 2.

Figure 3-1 shows the age range of survey respondents. Survey respondents ranged in age from 9 to 82. The median age of respondents is 41. A little more than 30% of respondents are under the age of 35, about 30% are between the ages of 35 and 44, and almost 40% are 45 or older. This trend corresponds with NSAA's most recent demographic study that found median ski and snowboard participants reaching 37 years of age.[51]

[50] This survey was completed primarily by adults with an average age of 41. It is important to remember that there are a large number of children that ski, snowboard, go tubing and snowmobiling with their parents. This survey reflects the characteristics of adults, not children.

[51] NSAA Demographic Survey, 2009-10.

Figure 3-1. Age of Oregon survey respondents compared to national age distribution



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2011 and 2009/10 NSAA National Demographic Report.

Over 90% of respondents indicated that they live with at least one other person. The reported average household size of respondents is 2.9 people. Fifty-five percent of respondents indicated they live in households with three or more people, while 35% live in two person households. When compared to the number of snowsport participants who live in a household, 80% of respondents live in households where at least two or more members ski or snowboard. The most common number of family members that ski or snowboard is two (34%), followed by three (19%), and four family members (18%).

Table 3-1 shows the total number of persons in households that participate in snowsports and the number under age 18. Of the 2,142 persons represented by the sample, 40% have no children under the age of 18. That means that 60% of households include members that are under the age of 18. Twelve percent of respondents indicated they have one household member under the age of 18, and 33% said that they had two household members under the age of 18.

When compared to household members who participate in snowsports, all of the households indicated that one or more household member participated in snowsports (any other result would be inconsistent with the sampling). More than three-quarters of the households have between two and four snowsport participants, while 8% of households indicated they had one participant.

With respect to children, nearly half of the households with children under 18 indicated that they had no children that participated in snowsports.

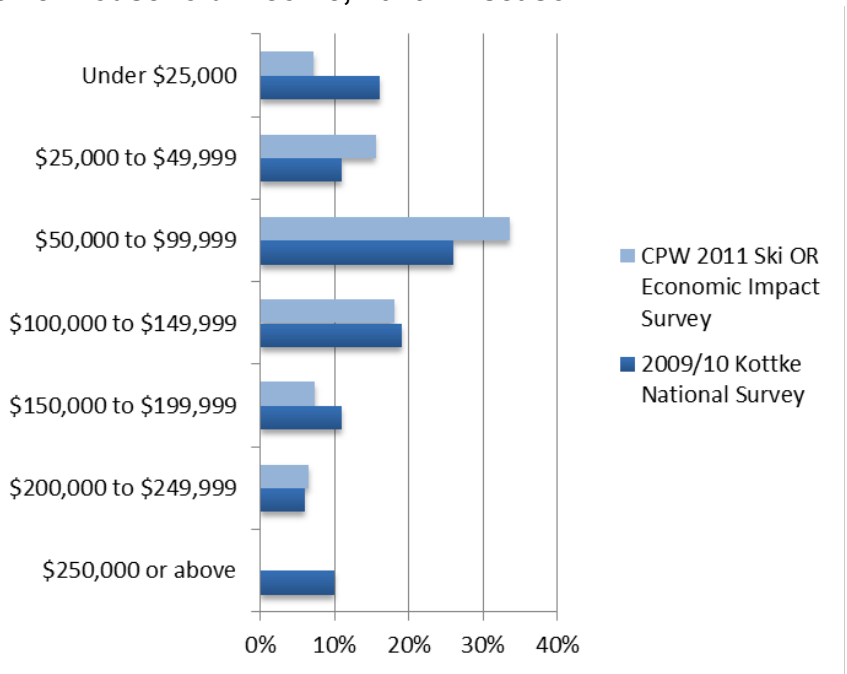
Table 3-1. Total snowsports participants in household, and participants under age 18

Number of Persons	All Persons				Persons under 18			
	HH Size		Number that Ski		HH Size		Number that Ski	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
0 persons	na	na	0		395	40%	430	48%
1 person	70	3%	147	8%	122	12%	125	14%
2 people	512	24%	508	27%	322	33%	276	31%
3 people	450	21%	417	22%	93	9%	66	7%
4 people	708	33%	508	27%	32	3%	0	0%
5 people	305	14%	235	12%	5	1%	0	0%
6+ people	97	5%	92	5%	12	1%	0	0%
Total	**2142**	**100%**	**1907**	**100%**	**981**	**100%**	**897**	**100%**

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Figure 3-2 shows the household income of survey respondents. Sixty percent of respondents had a household income of $75,000 or higher. The average household income of respondents is approximately $91,000, which is $29,448 higher than the statewide average.[52] Respondents in Oregon are comparable to national-level skier data, where 62% of skiers and snowboarders reported household incomes of $75,000 or more.[53]

Figure 3-2. Household income of respondents to national skier household income, 2010-11 season

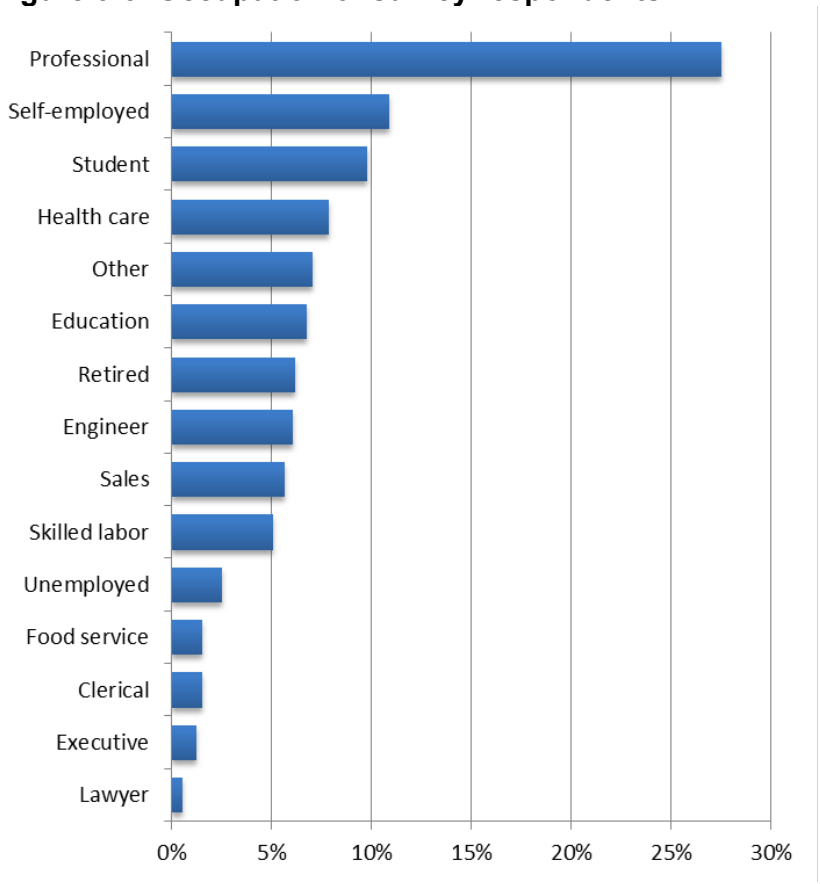


Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2011 and 2009/10 NSAA National Demographic Report.

[52] Oregon's Mean Household Income is $61,552 (U.S. Census, ACS 1-year estimates, DP03).
[53] NSAA, 2010 Demographic Study.

More respondents identified themselves as professionals (28%) than any other profession, as shown in **Figure 3-3.** The second most common profession was the self-employed (11%) followed by students (10%).

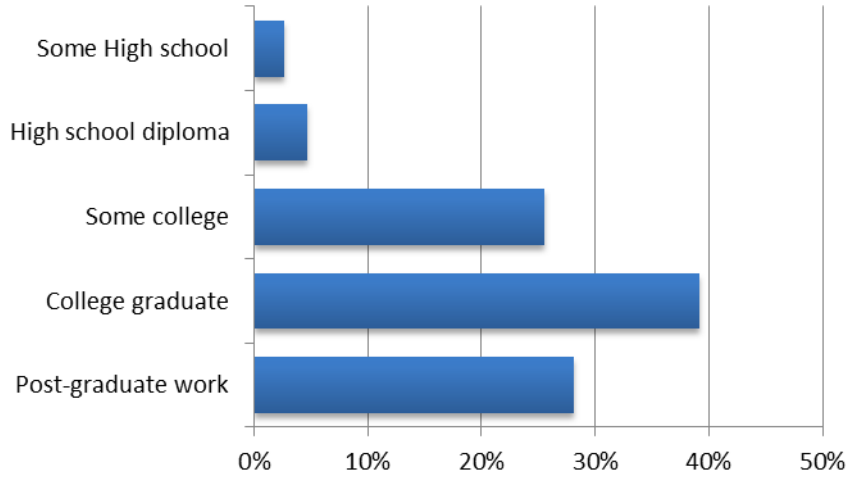
Figure 3-3. Occupation of survey respondents



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Educational attainment often corresponds closely to profession and income, thus, it is no surprise that 93% of respondents completed at least some college. College graduates represent 39% of respondents, with respondents with post-graduate degrees accounting for another 28% of respondents, as shown in **Figure 3-4**.

Figure 3-4. Educational attainment of survey respondents



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Participation Patterns

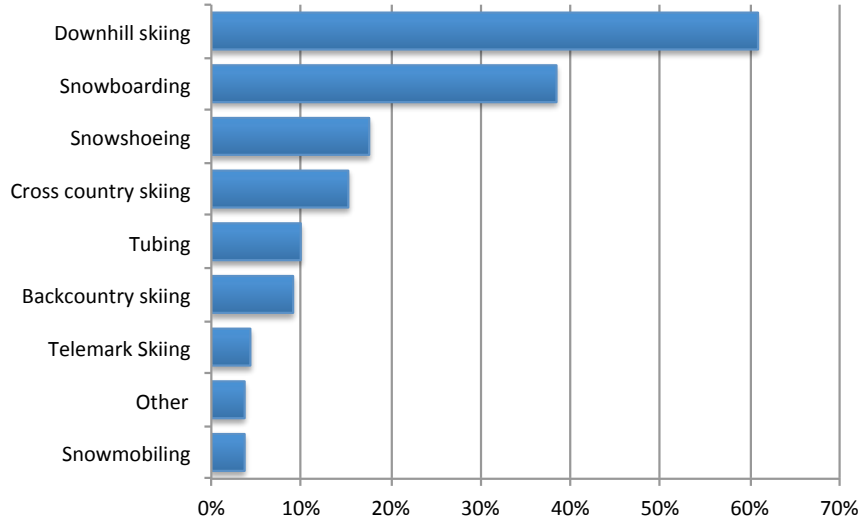
This section describes survey respondent characteristics regarding participation patterns and ability, and visitation characteristics. The characteristics of the sample taken for this study can be generalized to understand the typical Oregon skier/snowboarder's visitation patterns and participation.

Not surprisingly, the most popular snow-related activity of respondents is downhill skiing. A majority of respondents went downhill skiing (61%) during the 2010-2011 ski season, as shown in **Figure 3-5**. Responses indicate a higher rate of participation in snowboarding in Oregon than at the national level. Though respondents were able to select more than one category, 38% of responding snowsports participants indicated that they snowboarded during the 2010-11 season. Regional data supports this finding, as snowboarding accounted for an average of 41% of visits in the Pacific Northwest over the past four years.[54]

Snowsports following closely after downhill skiing and snowboarding include: snowshoeing (18%), cross country skiing (15%), and tubing (10%). Less than 10% of participants indicated partaking in backcountry skiing (9%), telemark skiing (4%), and snowmobiling (4%) during the 2010-11 season.

[54] NSAA 2011, p. 37.

Figure 3-5. Snowsport activities participated in by survey respondents, 2010-2011 season



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.
Note: Respondents could indicate more than one answer, thus percentages do not add up to 100%.

Ability Level

Downhill skiing is the most popular activity among survey respondents. The majority of respondents has never tried or consider themselves beginners at snowboarding (55%), cross-country skiing (65%), and/or telemark skiing (91%), as shown in **Table 3-2**. Seventy five percent of respondents consider themselves intermediate, advanced, or expert downhill skiers. Matching national and regional trends, the number of beginner downhill skiers is declining. This is likely related, in part, to the upward trend of median skier age. Notably, however, cross-country skiing maintains a healthy group (52%) of beginners and intermediates.

Table 3-2. Ability level of respondents by activity

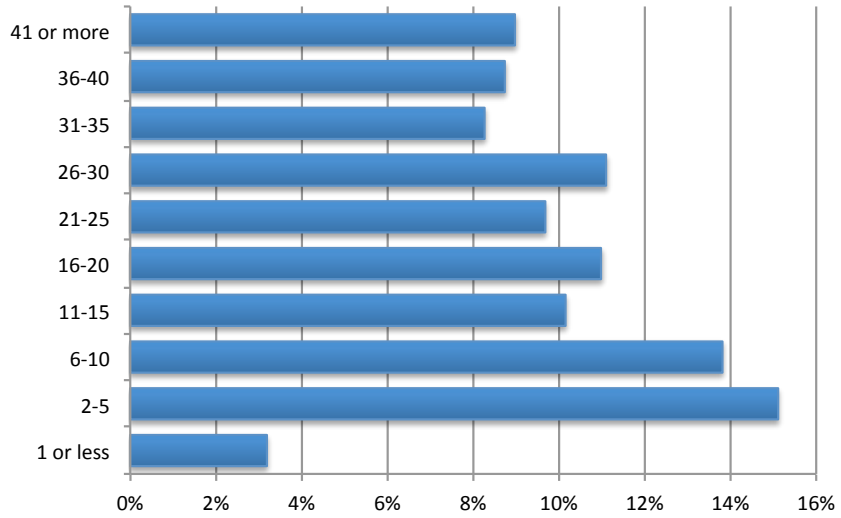
Activity	Never Tried	Beginner	Intermediate	Advanced	Expert	Total
Downhill Skiing	13%	12%	25%	**27%**	23%	100%
Snowboarding	**33%**	22%	18%	19%	8%	100%
Cross-Country Skiing	**37%**	28%	24%	8%	3%	100%
Telemark Skiing	**82%**	9%	5%	3%	2%	100%

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012. Percentages may add up to more than 100% due to rounding

Figure 3-6 shows the number of years that respondents have been active in snow-related sports. This figure, as previously mentioned, does not capture the years of skiing and snowboarding of children in Oregon. Corroborating the data presented regarding beginner skiers in **Table 3-2**, only 3% of respondents were brand new to skiing and snowboarding in the 2010-2011 season. Another 15% have been skiing or snowboarding

between two and five years, 14% between six and ten years, 10% between 11 and 15 years, and 11% between 16 and 20 years. Almost 50% of respondents have been skiing or snowboarding for 21 years or more, matching results of NSAA's most recent research noting 43% of skiers indicate having 20 or more years of ski experience.[55]

Figure 3-6. Respondent years skiing/snowboarding



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Participation Rates

Participation rates are an important aspect of the Oregon skier and snowboarding market and the Oregon ski and snowboard industry. **Table 3-3** shows the number of days that respondents spent in the mountains along with the number of days they participated in snowsports. The median number of days spent in the mountains was 14; the median number of days participating in snowsports was 11. The average number of days participated, however, was closer to 18, indicating that many respondents participated a great deal more than 11 days.[56]

Respondents typically spent less than 15 days in the mountains (59%), and consequentially spent less than 15 days participating in snowsports (62%). Still, skiers and snowboarders tend to visit resorts in the Pacific Northwest more often than national averages. Reported regionally by NSAA, compared most closely with the Northeast which sees skiers approximately 12 days of a season, Pacific Northwest resorts typically see skiers more than 16 days a season.[57] Season pass holders reported

[55] NSAA Demographic Study, p. 30.
[56] We believe the median figures are a better representation of the overall distribution. A few respondents reported participation rates in the 100s of days—an expected outcome. These outliers push the arithmetic average much higher. The average number of days spent in the mountains as reported by survey respondents was 20.2; the average number of days spend skiing was 18.5.
[57] NSAA 2010, p.32

participating a median of 20 days each season, a median of 22 days spent in the mountains.

Table 3-3. Frequency of participation in snowsports in Oregon, 2010-2011 season

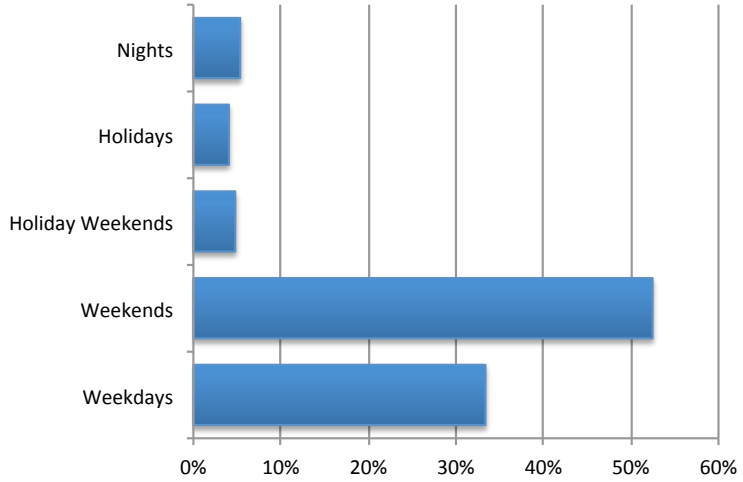
	In Mountains		Participating in Snowsports		Season Pass Holders	
Days	Number	Percent	Number	Percent	Number	Percent
0	14	2%	34	4%	4	1%
1-5	168	19%	195	**23%**	29	7%
6-10	196	**23%**	196	**23%**	67	**16%**
11-15	133	15%	108	13%	61	15%
16-20	83	10%	89	10%	62	15%
21-25	60	7%	54	6%	46	11%
26-30	66	8%	63	7%	49	12%
31-35	22	3%	25	3%	20	5%
36-40	35	4%	19	2%	16	4%
41-45	9	1%	12	1%	10	2%
46-50	25	3%	15	2%	15	4%
51 or More	51	6%	50	6%	40	10%
Total	**862**	**100%**	**860**	**100%**	**419**	**100%**

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Not surprisingly, average participation responses were higher for season pass holders: an average of 29.3 days were spent in the mountains, while an average of 27.2 days were spent participating in snowsports. Forty-nine percent of survey respondents reported purchasing at least one season pass for the 2011-12 season. Nearly 9% of respondents indicated purchasing a season pass to more than one resort during the 2010-11 season.

Respondents were asked to estimate the percentage of time they ski on weekends, weekdays, nights, or holidays. **Figure 3-7** shows that more than half (52%) of respondents' skiing/snowboarding time was on weekends, and one-third was on weekdays. Respondents skied/snowboarded 14% of the time on nights, holidays, and holiday weekends combined. These results closely parallel the results reported in the 2011 Kottke report, which indicated that 63% of visits to Northwest ski areas were during holidays or weekends. By comparison, respondents to the Oregon Skier Survey reported making 61% of their visits on holidays or weekends (including holiday weekends).

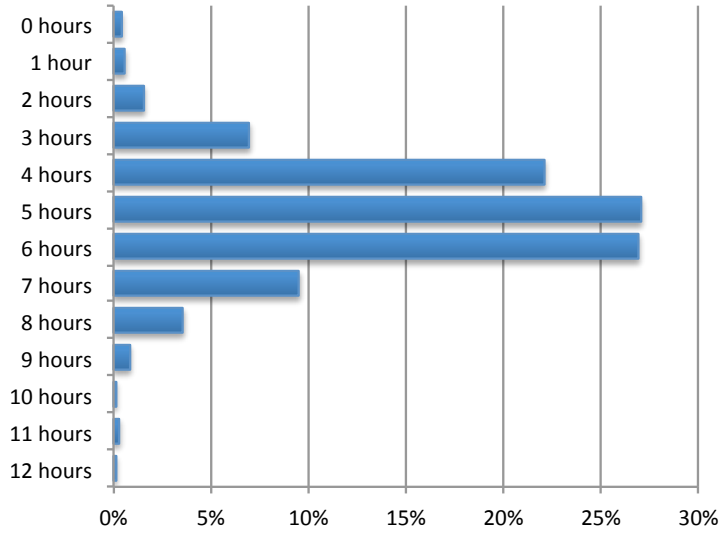
Figure 3-7. Skier visits by time of week, 2010-2011 season



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Figure 3-8 shows the hours per day respondents spent on snow activities. Respondents spent an average of 5.2 hours on snow per visit. Respondents reported spending between 0 hours (3 respondents) and 12 hours (1 respondent) on the snow. The median value was 5 hours.

Figure 3-8. Hours per day spent on snow activities, 2010-2011 season

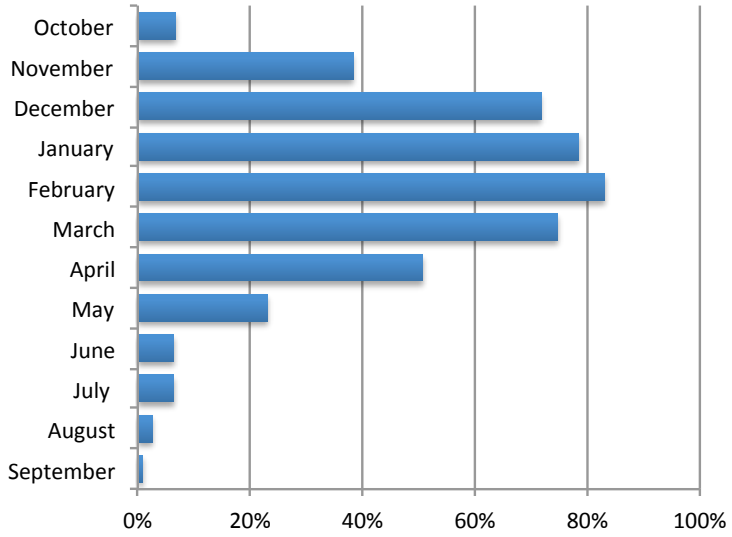


Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Figure 3-9 captures the distribution of visits by month for respondents' 2011-12 skiing/snowboarding season. More than one-third of respondents began snow activities in November with participation increasing each month and peaking in February 2011, with greater than 83% of respondents' skiing/snowboarding in that month. Participation tapers off of in the following months, though, unique to Oregon and its

Pacific Northwest neighbors, snowsports participation continues year-round. A small percentage (generally less than 6%) ski/snowboard throughout the summer and fall seasons.

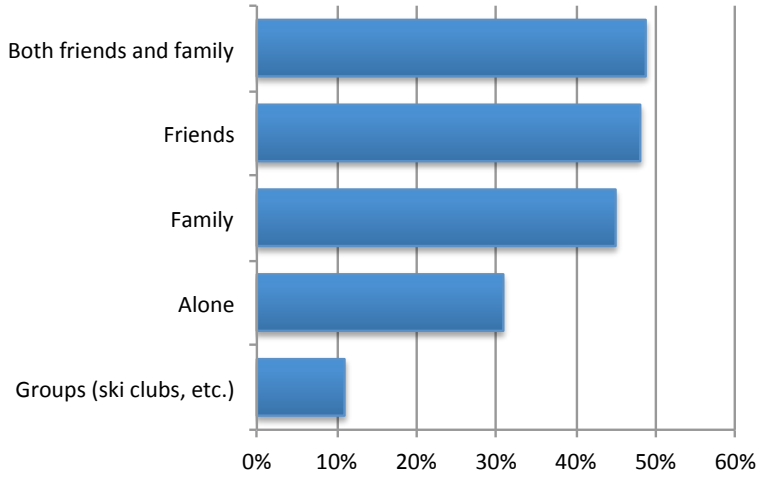
Figure 3-9. Participation by month, 2010-2011 season



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Respondents indicated that they usually ski or snowboard with both family and friends (49%), as shown in **Figure 3-10**. Almost half of the respondents also indicated they ski/snowboard with friends (48%) or family (45%), indicating that respondents more often ski with at least one other person, compared to skiing and snowboarding alone (31%). Only 11% of respondents said that they ski with groups, such as a ski club.

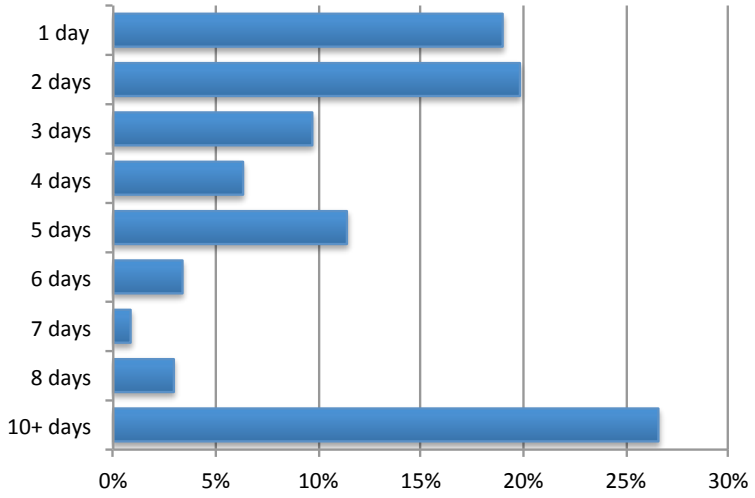
Figure 3-10. Composition of ski/snowboard parties, 2010-2011 season



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.
Note: Respondents could indicate more than one answer, thus percentages do not add up to 100%.

Twenty-nine percent of respondents indicated that they visited non-lift served terrain (backcountry) during the 2010-11 season. Of those that did, as shown in **Figure 3-11,** about 39% rode non-lift served terrain for one to two days of the season, while about 27% of backcountry skiers reported skiing 10 days or more. Another 21% said that they spent one to seven days in the backcountry and just 9% of respondents said that they spent eight days or more in the backcountry.

Figure 3-11. Backcountry skiers reported number of days on non-lift served terrain, 2010-2011 season



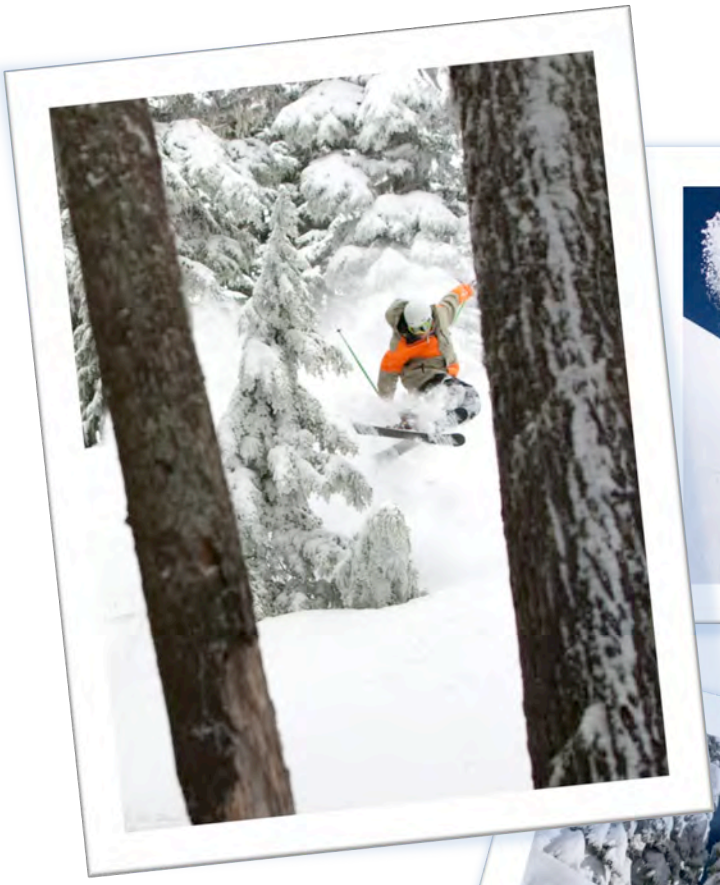
Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

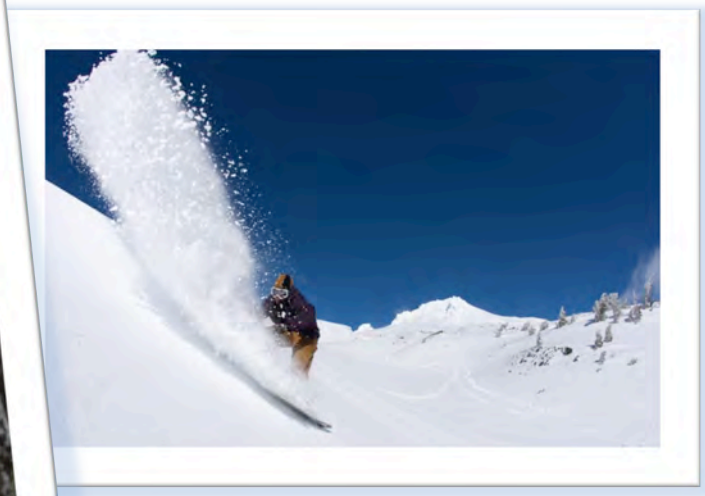
Key Findings

- More men (59%) than women (41%) respondents ski and snowboard in Oregon.
- The average age of respondents is 41 (note that the survey did not include subjects under the age of 18).
- The average household size of respondents is 2.9.
- The average household income of respondents is $91,000; the median household income is $82,500.
- The three most common occupations among respondents are professionals, self-employed, and students.
- Sixty-seven percent of respondents have at least a college degree.
- Skiing is the most common snowsport respondents participated in (61%), followed by snowboarding (38%), and snowshoeing (18%).
- Eighty percent of respondents indicated that at least two family members ski or snowboard.
- Forty-one percent of respondents have at least one household member that is under the age of 18.
- Seventy-five percent of respondents indicated that they were intermediate, advanced, or expert skiers. The majority of respondents said that they had never tried or considered themselves beginner snowboarders (55% combined), cross country skiers (65% combined), and telemark skiers (91%).
- Approximately 50% of respondents have been skiing or snowboarding for 20 years or less.
- Respondents spent an average of 20 days in the mountains and 18 days participating in snowsports.
- Weekends constituted 52% of the time respondents spent on snow activities.
- Respondents spent an average of 5.2 hours on snowsports per snow activity day.
- More respondents ski and snowboard during the month of February (2011) than any other month.
- Almost half of respondents ski and snowboard with friends.
- Seventy-one percent of respondents indicated that they never went skiing or snowboarding in the backcountry.

Chapter 4:

Skiing and Snowboarding in Oregon





CHAPTER 4: SKIING AND SNOWBOARDING IN OREGON

This chapter describes characteristics of Oregon snowsport visits, both of day and destination skiers and snowboarders. Visitation patterns are an important element in the analysis of the Oregon skiing and snowboarding industry. The overall number of annual visitors to winter resort areas depends on a variety of factors, including weather patterns (specifically snowfall), socio-economic characteristics, and whether or not visitors are day skiers/snowboarders or destination skiers/snowboarders. In addition, there is wide variation in participation between daily lift ticket purchasers (median of six visits per season) and season pass holders (median of 20 visits per season).

This chapter analyzes the differences between day visitors and destination visitors to ski and snowboarding resorts nationally and in Oregon. Day and destination visitors are defined in this study as:

- **Day visitors** are those who spend one day skiing or boarding and return home to their primary residence at the end of the day.
- **Destination visitors** are those who spend one or more nights and two more days consecutively skiing or snowboarding away from their primary residence.

Destination visitors can be considered a sub-category of day visitors, in that some, but not all, day visitors take ski and snowboarding vacations. Both of these groups are important to the ski industry, and it is important to understand the differences in each group's visitation and spending patterns. The visitor definitions above to not capture all visitors—there is a third group of people who ski two days consecutively and spend a night away from their primary residence. This group of visitor expenditures and visitation patterns are similar to day visitors.

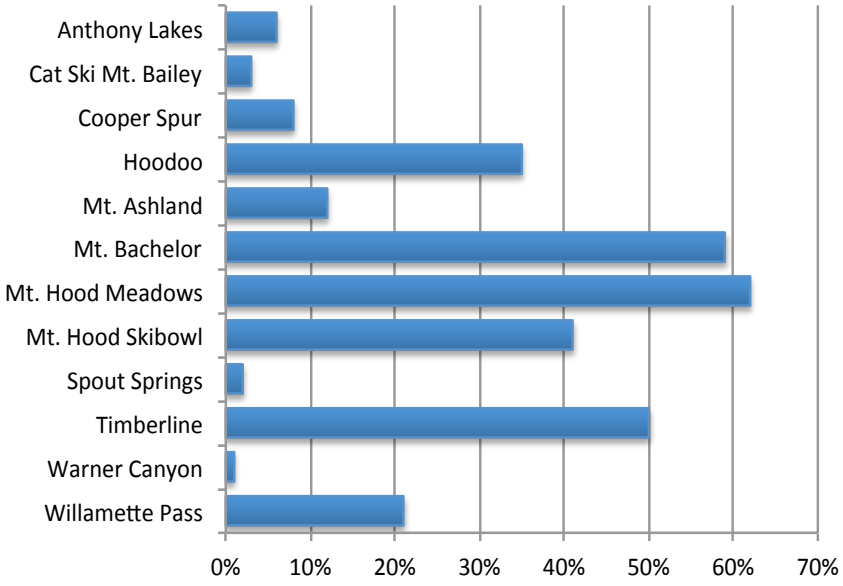
Day visitors to Oregon ski areas represent approximately 78% of total skier visits annually. Based on the number of total skier/snowboarder visits (1.9 million) during the 2010-11 season and the average visitation of the Oregon skiers, CPW estimates day visitors represent more than 1.56 million skier/snowboarder visits. Destination visits, then, account for approximately 22% of total skier visits to Oregon ski areas, representing more than 403,000 skier visits during the 2010-11 season.

Overall visitation patterns

The survey first asked respondents to indicate which Oregon ski areas they visited during the 2010-11 season. More than 80% of respondents indicated they visited more than one Oregon ski area. Two-thirds of respondents reported they visited between two and five Oregon ski areas. Only 1% of respondents indicated they visited 10 or more Oregon ski areas.

Mt. Hood Meadows was the most commonly visited ski area with 62% of respondents indicating that they skied or snowboarded Mt. Hood Meadows, as shown in **Figure 4-1**. Mt. Bachelor was the second (59%) most commonly visited ski/snowboarding destination, followed by Timberline (50%).

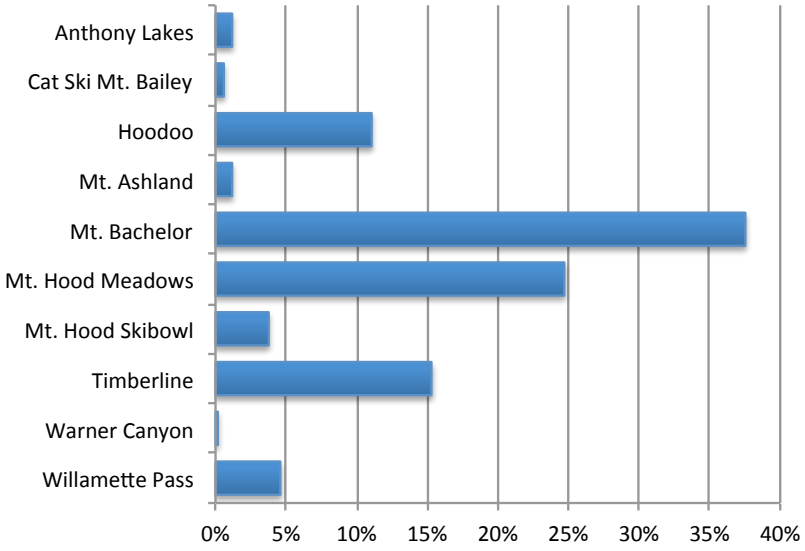
Figure 4-1. Oregon ski areas respondents have ever visited by survey respondents



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.
Note: Respondents could indicate more than one answer, thus percentages do not add up to 100%.

Mt. Bachelor is the favorite ski area for 38% of respondents, as shown in **Figure 4-2**. Mt. Hood Meadows ranked second, with 25% of respondents indicating it is their favorite place to ski and snowboard, followed by Timberline (15%) and Hoodoo (11%).

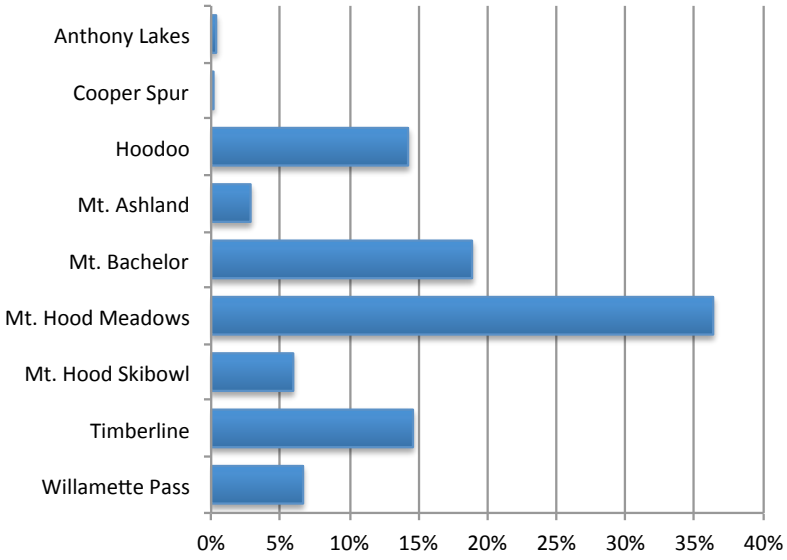
Figure 4-2. Favorite Oregon ski/snowboarding area



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

The proximity of Mt. Hood Meadows to the Portland metro skiing and snowboarding market make it one of the most visited skiing/snowboarding destinations in Oregon. **Figure 4-3** shows that 36% of respondents indicated that they ski/snowboard most often at Mt. Hood Meadows. The second most commonly visited ski/snowboard area is Mt. Bachelor (19%). Timberline and Hoodoo are virtually tied for 3rd and 4th place with 15% and 14% of respondents saying they visited those two skiing/snowboarding areas the most, respectively.

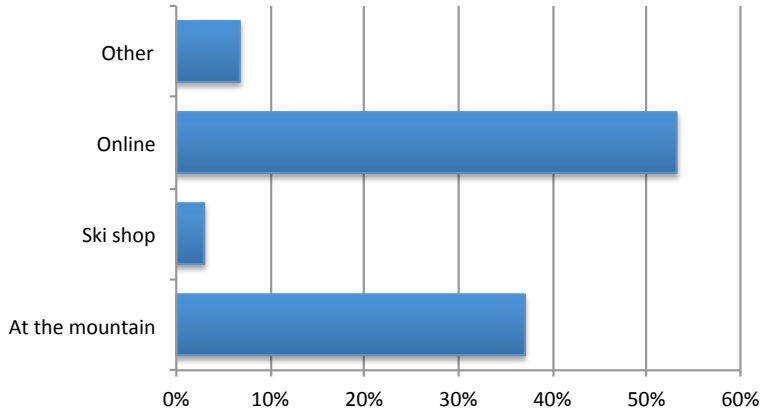
Figure 4-3. Where respondents ski/snowboard most often, 2010-2011 season



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.
Note: The distribution of responses presented in Figure 4-3 is representative of the sample, which did not proportionally represent all of the ski areas. See Table 1-1.

In addition to purchasing snowsports items, the Internet has also become the preferred outlet for skiers and snowboarders to purchase lift tickets and season passes, as shown in **Figure 4-4**. Online purchases allow skiers and snowboarders ease of access to ski facilities, often circumventing long lines at the ticket window or other logistical challenges. More than 50% of respondents purchased lift tickets and season passes online, a trend that has been reported at the national and regional levels. On-mountain ticket purchases amounted to 37% of lift ticket purchases, and just 3% of respondents purchased tickets at a ski or snowboard shop. Some respondents purchased tickets at annual ski shows, amongst other outlets.

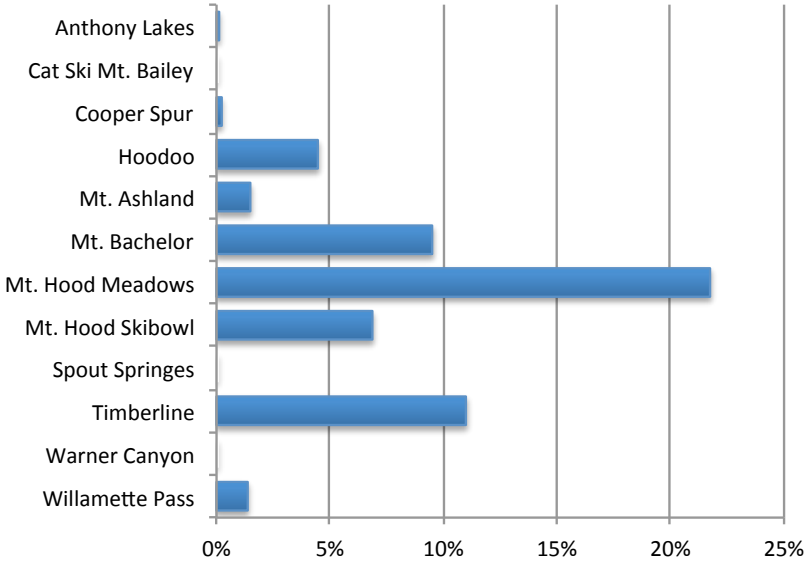
Figure 4-4. Preferred location to purchase lift ticket/season pass as reported by survey respondents



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

About half (49%) of the respondents indicated that they were season pass holders. Of those that indicated they had a season pass, 22% had a season pass for Mt. Hood Meadows, 11% at Timberline, and 9% at Mt. Bachelor, as shown in **Figure 4-5**. Nine percent of respondents indicated that they had season passes at more than one resort, some individuals having season passes at up to three Oregon ski areas.

Figure 4-5. Season pass holders by ski area, 2010-2011 season



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.
Note: The distribution of responses presented in Figure 4-5 is representative of the sample, which did not proportionally represent all of the ski areas. See Table 1-1.

Season pass holding respondents tended to be more experienced, as 53% of pass holders indicated having 21 years of ski/snowboard experience or more. On the contrary, 28% of pass holders indicated having fewer than

ten years of experience, and about 13% had less than five years of experience. This information supports **Table 4-2**, which shows that many alpine skiers and snowboarders with season passes tend to be more advanced skiers/snowboarders. It is likely that this data supports diversification or "cross-over" of activities among snowsports disciplines.

Table 4-2. Season pass holders by ability level, 2010-11 season

Activity	Beginner	Intermediate	Advanced	Expert
Downhill Skiing	12%	23%	30%	**35%**
Snowboarding	27%	24%	**34%**	16%
Cross-Country Skiing	**42%**	38%	13%	6%
Telemark Skiing	**49%**	28%	15%	9%

Percentages may add up to more than 100% due to rounding.

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

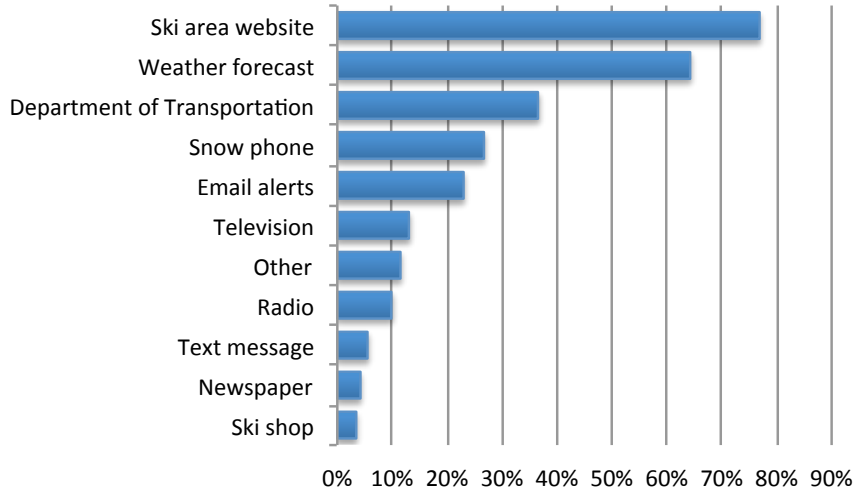
Day Visitor Characteristics

To better understand the behavior of day visitors, survey respondents were asked about where the source of snow and road information, their mode of transportation and distance traveled to resorts, and who they traveled with. In addition, respondents were asked about the services they used and general quality of resort amenities. This information is important to understand what visitors desire when skiing and snowboarding. Further, visitors perception of resort employees influence their opinions of resorts and their overall skiing and snowboarding experience.

Travel Characteristics

When asked "where do you get your information on current snow and road conditions," the most common response was ski area websites (77%), as shown in **Figure 4-6**. Respondents also looked up weather forecasts (65%) and the Oregon Department of Transportation (37%).

Figure 4-6. Source of snow/road information, 2010-2011 season



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2011.
Note: Respondents could indicate more than one answer, thus percentages add up to more than 100%.

The majority of respondents prefer driving their car (84%) or carpool (10%) to the ski hill, as shown in **Table 4-3**. Just 3% of respondents indicated they take a bus. Of the respondents that indicated they take another form of transportation, most listed trucks, SUVs, minivans, or 4X4 trucks, in other words, an automobile. One person said they hitchhiked and two people indicated they took an airplane.

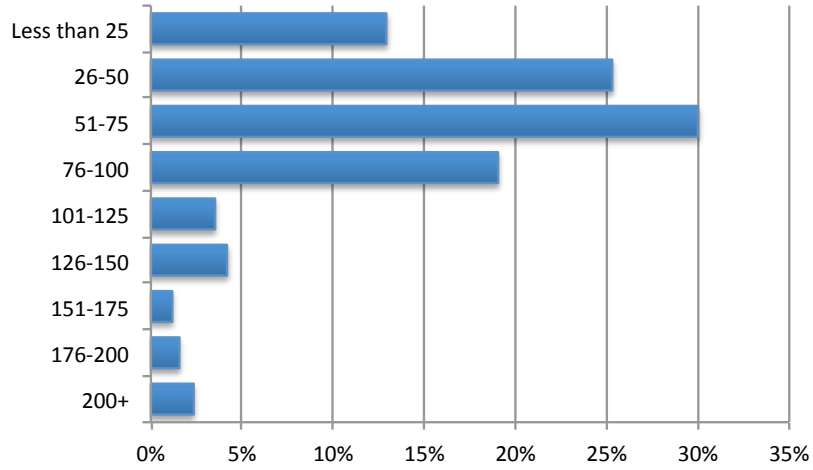
Table 4-3. Mode of transportation to ski/ride, 2010-2011 season

Mode of travel	Percent
Other	3%
Bus	3%
Carpool	10%
Car	**84%**

Source: Community Planning Workshop,
Ski Oregon Economic Impact Study, 2012.

Figure 4-7 shows the distance traveled (in miles) one-way to ski/snowboard for respondents. Almost one-third (30%) of respondents travel between 51 to 75 miles, 25% traveling between 26 and 50 miles, and 13% traveling less than 25 miles. Given the distance of ski areas in Oregon from population centers, the average Oregon skier/snowboarder travels 136 miles round trip to ski/snowboard. About 13% of respondents said that they travel more than 100 miles, one-way, to ski/snowboard.

Figure 4-7. Number of miles traveled to ski/ride (one-way), 2010-2011 season



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Considering the distance most skiers and snowboarders travel, often by car, to reach ski areas (CPW found an average distance of 68 miles, one way), participants often refer to media outlets for up-to-date weather and road conditions.

Fewer than 15% of respondents typically travel alone to the ski hill, as shown in **Table 4-4**. Forty percent of respondents travel with one other person (two people total), 21% travel with two other people (three people total), and 15% travel with three additional people (four people total). Just 10% of respondents indicated that they travel with four additional people (five people total) or more (more than five people).

Table 4-4. Size of travel party, 2010-2011 season

Party Size	Percent
1 person	14%
2 people	40%
3 people	21%
4 people	15%
5 people	6%
6 or more	4%

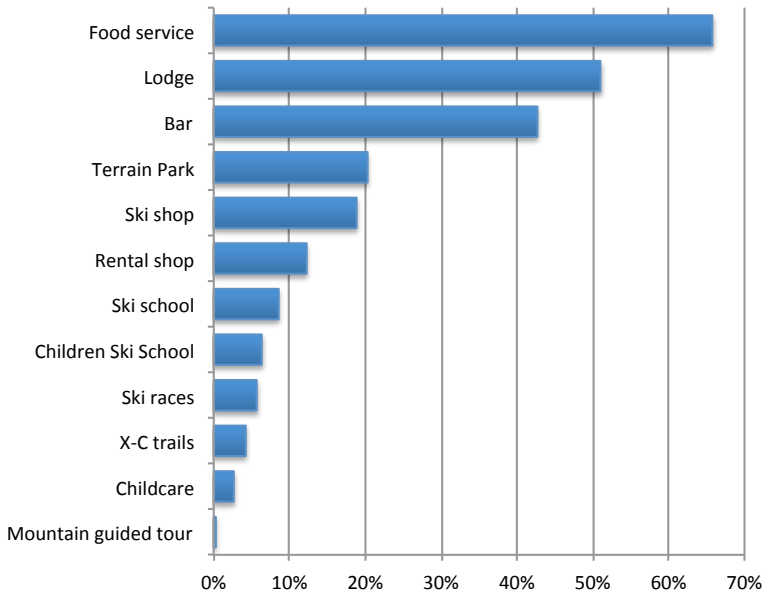
Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

On-Mountain Activities of Day Skiers

More than half of respondents said they purchased food (66%) and/or visited the lodge (51%) during their last ski/snowboarding trip, as shown in **Figure 4-8**. Another 43% indicated they visited the bar. Twenty percent of respondents visited a terrain park and 19% used a rental shop. Fewer than 10% of respondents indicated they used the ski school, children's ski

school, ski races, cross-country trails, childcare, or a mountain guided tour.

Figure 4-8. Activities or services used during last trip to Oregon ski areas, 2010-2011 season



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

When asked to rate services provided by ski areas and conditions present at their most recent (on a scale of 1 to 5 stars where 1 equals very poor and 5 equals excellent), respondents provided rankings based on their most recent ski/snowboarding visit in Oregon**. Table 4-5** summarizes the rankings respondents assigned to each mountain amenity and condition listed.

Most amenities and conditions were given a ranking of three or higher, where employees and lift lines received mostly marks in the four or five star range. Conversely, food service and childcare tended to elicit scores closer to three stars. Assuming that the mid-range of 2.5 stars is neutral (neither poor nor excellent), then even the three lowest rated services and conditions were rated positively by respondents.

Table 4-5. Rating of ski area services and conditions, 2010-2011 season

Service/Characteristic	Ranking in Stars (0 stars = poor; 5 stars = excellent)						Average # of Stars
	No stars	★	★★	★★★	★★★★	★★★★★	
Employees	1%	3%	9%	24%	**33%**	30%	3.89
Lift lines	2%	4%	11%	26%	26%	**31%**	3.79
Ski terrain	1%	2%	7%	**37%**	34%	19%	3.76
Ski school	5%	3%	8%	25%	**31%**	29%	3.73
Weather	1%	3%	19%	**38%**	28%	11%	3.63
Slope conditions	1%	3%	11%	**37%**	32%	16%	3.63
Lodge	3%	3%	15%	**32%**	27%	20%	3.53
Parking	2%	7%	16%	27%	**28%**	20%	3.50
Snow conditions	1%	3%	15%	**39%**	29%	13%	3.50
Traffic	1%	5%	21%	26%	**27%**	20%	3.41
Childcare	10%	10%	13%	**24%**	22%	22%	3.18
Food service	3%	8%	20%	**36%**	22%	11%	3.16

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012. Percentages may add up to more than 100% due to rounding.

Destination Visitor Characteristics

For the purposes of this study, destination visitors are skiers or snowboarders who go skiing or snowboarding for two more consecutive days and spend one or more consecutive nights away from their primary residence.

Visitation patterns of destination visitors

Sixty percent of respondents said that they had taken a destination ski or snowboard vacation in the last three years. Of those, 53% said that the destination vacation was in Oregon; with the majority, 92%, indicating that the primary purpose of the trip was to participate in snowsports. Almost all of the respondents that indicated they had made a destination ski trip (97%) said that they plan on taking a destination ski vacation in Oregon again in the future.

Table 4-6 shows that Oregon destination trips typically last three days. Approximately 25% spent two days, around 35% spent three days, slightly more than 20% spent four days, and a little less than 20% spent five or more days vacationing at a ski/snowboard resort in Oregon. The most popular months to take snowsport related vacations, amongst respondents, were the months of February and March.

Table 4-6. Destination visitor vacation days at Oregon ski areas, 2010-2011 season

Length of Visit	Percent
2 days	18%
3 days	21%
4 days	36%
5+ days	25%

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

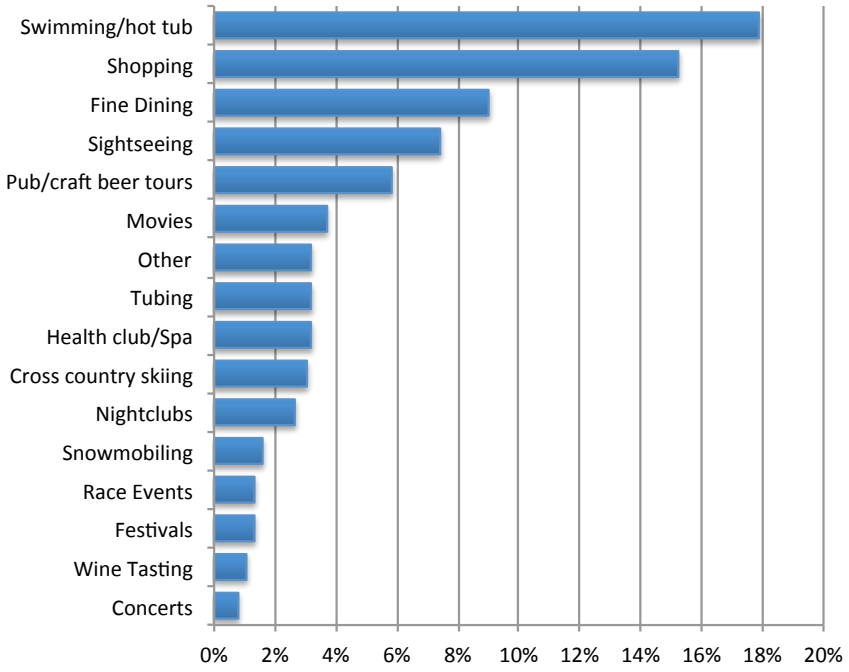
Approximately 62% of destination visitor respondents said that they traveled between five and 20 miles from their lodging to their skiing/snowboarding destination. About 10% traveled less than five miles, and 28% traveled more than 20 miles to reach the ski area.

Destination skier activities

Characteristically, destination visitors use different amenities or participate in more than just their primary snowsport, often looking beyond the ski hill for activities for themselves and/or family members. **Figure 4-9** shows that destination visitors engage in a wide range of activities beyond the slopes.

Most common was swimming/hot tubing with 18% of respondents indicating they did this activity, followed by shopping (15%) and fine dining (9%). Approximately 16% of activities beyond the snow were entertainment-oriented, while about 8% of respondents indicated participating in other on-snow activities such as tubing, cross-country skiing, and ski biking.

Figure 4-9. Destination visitor activities, 2010-2011 season



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.
Note: Respondents could indicate more than one answer, thus percentages add up to more than 100%.

Key Findings

- Mt. Hood Meadows was the most commonly visited ski area by respondents (62%), followed by Mt. Bachelor (59%), and Timberline (50%).
- Respondents indicated that Mt. Bachelor was their favorite destination (38%), followed by Mt. Hood Meadows (25%), and Timberline (15%).
- Thirty-six percent of respondents said that they ski/snowboard most often at Mt. Hood Meadows, followed by Mt. Bachelor (19%). Timberline and Hoodoo were closely ranked at 3rd and 4th place with 15% and 14% of respondents saying they visited those two skiing/snowboarding areas the most, respectively. Note that this result is a function of the distribution of responses which were not proportional to the number of skier visits at all areas.
- The preferred place for respondents to purchase lift ticket/season passes is the Internet (53%) followed by on the mountain (37%).
- Almost half of respondents said they had a season pass—22% at Mt. Hood Meadows, 11% at Timberline, and 9% at Mt. Bachelor.
- Most respondents (77%) get current snow and road conditions from websites.

- Most respondents (84%) drive a car (and another 10% carpool) to get to mountain resorts.
- The average one-way trip to a ski/snowboard resort is 68 miles.
- Eighty-five percent of respondents travel with at least one other person to ski and snowboard.
- The top three services/amenities used by day visitors are food service (66%), visited the lodge (51%), and/or visited the bar (43%).
- The top three rated characteristics of ski/snowboard areas in Oregon are employees (3.89 rating on a scale from 1 to 5 where 1 is very poor and 5 is excellent), lift lines (3.79), and ski terrain (3.76).
- The lowest three rated characteristics of ski/snowboard areas in Oregon are food service (3.16), childcare (3.18), and traffic (3.41).
- Sixty percent of respondents said they took a destination ski or snowboard vacation in the last three years.
- Approximately 62% of destination visitor respondents said that they traveled between five and 20 miles from their lodging to their skiing/boarding destination. About 10% traveled less than five miles, and 28% traveled more than 20 miles.
- The top three non-skiing/boarding activity for destination visitors is swimming/hot tubing (18%), shopping (15%), and fine dining (9%).

CHAPTER 5:

SKI EQUIPMENT SHOPPING PATTERNS

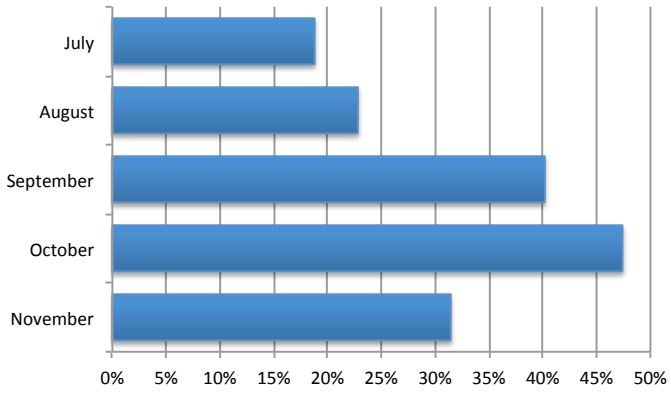
CHAPTER 5: SKI EQUIPMENT SHOPPING PATTERNS

Skiing and snowboarding equipment and apparel constitute some of the most significant expenditures for skiers and snowboarders in Oregon. Snowsports Industries of America (SIA) estimates the average equipment set up (skis, boots, and bindings) for a skier to total just under $800, and about $590 for a snowboard setup (snowboard, boots, and bindings).[58] These data suggest ski and snowboard equipment sales and rentals are a significant portion of the overall economic impact of the ski industry in Oregon. This chapter provides information regarding ski- and snowboard-related expenditures including shopping patterns and media influences on skier buying decisions.

Shopping Patterns and Advertising

Many ski shops have an annual early-season snowsports equipment swap to buy, sell, or trade equipment. These events are typically a way for skier and snowboarders not only to purchase or sell gear from previous season, but often to reconnect and energize skiers and snowboarders after many months without snow. Ski swaps have been a staple community event for snowsports participants in Oregon for over 40 years.[59] Seventy percent of respondents indicated that they shop preseason sales. **Figure 5-1** shows that more people shop in October (47%) than any other month; September (40%), and November (31%) are also popular months to shop.

Figure 5-1. Pre-season shopping activity as reported by survey respondents



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.
Note: Respondents could indicate more than one answer, thus percentages add up to more than 100%.

[58] SIA Intelligence Report, 2011, p. 8.
[59] 43rd Annual Ski Swap, Accessed 28 June 2012. http://www.eugeneskiswap.org/.

When asked which email lists, alerts, or apps they found most influential, respondents identified a wide range of media and advertising. Respondents listed digital media as most influential for equipment purchases and snowsport related weather, and road conditions. More than half of survey respondents said that they subscribe to some kind of a snowsport-related email list, deal alerts, or smartphone application.

The most commonly mentioned media source (13% of responses) was the REI Mobile App, both for shopping and snow conditions.[60] This application was followed by Ski & Snow Report, a mobile app[61] that provides updated snow reports and trail maps of each ski area, which garnered 9% of responses. Mt. Hood Meadows email alerts were found most influential by 8% of respondents. Many respondents indicated getting information about weather conditions from Facebook notifications and individual mountain resorts (Hoodoo, Mt. Bachelor, Timberline, etc.). Websites focused on gear reviews, such as SteepandCheap.com and TheClymb.com, were indicated by respondents as influential to their gear purchases.

Respondents were most likely to weigh performance as the characteristic most important when it came to equipment purchases for snowsports. Price and brand, respectively, were considered important in respondent's decision-making, as shown in **Table 5-1**. Color and advertising were the least influential characteristics considered when purchasing snowsports equipment.

Table 5-1. Rank of snowsport equipment influences as reported by survey respondents

Rank	1	2	3	4	5	6
Brand	15%	22%	**33%**	20%	7%	2%
Advertsing	1%	3%	5%	19%	35%	**37%**
Performance	**50%**	28%	13%	5%	2%	1%
Price	30%	**36%**	23%	8%	2%	1%
Friends	4%	7%	16%	27%	**33%**	14%
Color	1%	4%	9%	20%	21%	**46%**

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Location and Timing of Equipment Purchase

Diversification of purchasing options and availability of products has changed drastically in the last two decades, primarily due to the proliferation of online and big box retailers. Snowsports Industries of America (SIA) refers to ski shops as "specialty stores," while larger sporting goods stores are referred to as "chain stores." Specialty stores remain the dominant location for most snowsport purchases, accounting

[60] "REI Mobile Apps" by Recreational Equipment, Inc. Accessed 28 June 2012. http://www.rei.com/mobile.html.
[61] "Ski & Snow Report App" by SkiReport.com. Accessed 28 June 2012.http://itunes.apple.com/us/app/ski-snow-report/id300412347?mt=8.

for nearly 61% of sales at the national level.[62] Chain stores and Internet sales account for roughly 20% and 19% of total sales.[63] Respondents indicated that ski shops and sporting goods stores are the most common locations to purchase snowsport equipment, apparel, and accessories, as shown in **Table 5-2**.

Respondents preferred ski shops to sporting goods stores for purchases of both equipment (42%) and accessories (37%). Sporting goods stores were the preferred outlet for snowsports apparel. Internet purchases by respondents were more common than national data collected by SIA for equipment, apparel, and accessories. Respondents indicated that approximately one-quarter of purchases for all snowsports items were executed online. Ski shows, department stores, ski swaps, and ski areas generally account for less than 10% of sales each.

Table 5-2. Location of snowsports equipment purchases as reported by survey respondents

	Equipment		Apparel		Accessories	
Purchase Location	Number	Percent	Number	Percent	Number	Percent
Ski shop	359	**42%**	285	34%	314	**37%**
Ski swap	144	17%	61	7%	61	7%
Ski area	71	8%	85	10%	129	15%
Sporting goods store	212	25%	338	**40%**	295	35%
Online vendors	228	27%	245	29%	225	27%
Department store	22	3%	78	9%	44	5%
Ski show	70	8%	59	7%	48	6%

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.
Note: Respondents could indicate more than one answer, thus percentages add up to more than 100%.

The survey asked respondents to rank the influence of 13 different media on their purchases. The survey instrument did this in two separate ways—it asked respondents which media are most influential (three categories) and it asked respondents to rank the media.

Table 5-3 shows that peer reviews were by far the most influential on respondents' equipment purchases. The results suggest that magazines, vendor websites, online publications, and retailer notifications are second-tier influences. Email and social media appear to be third tier, while more traditional sources such as newspapers, television, and radio are less influential. Web sidebars were ranked least influential by respondents.

[62] 61% of sales represent roughly $2 billion of the $3.3 billion industry. SIA Intelligence Report, 2011 p. 8.
[63] SIA Intelligence Report, 2011, p. 8.

Table 5-3. Respondent rankings of media influence on ski/snowboard equipment purchases

Category	Most Influential	Second Most Influential	Third Most Influential	Total Rankings
Peer-reviews	232	114	68	414
Magazine	126	116	111	353
Vendor website	135	128	89	352
Online publication	142	108	62	312
Retailer notifications	108	99	94	301
Email	90	87	72	249
Social Media	67	75	85	227
Newspaper	51	44	82	177
Television	46	52	78	176
Radio	57	47	68	172
Direct Mail	36	56	68	160
Web Sidebars	11	31	75	117
Other	28	11	13	52

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

The results in **Table 5-3** are suggestive of overall influence, but they also suggest that different people respond to different media.

Table 5-4 shows how respondents ranked the different media against each other. The overall rankings are the same as in Table 5-3, however the results provide more detail on the overall ranking of the media.

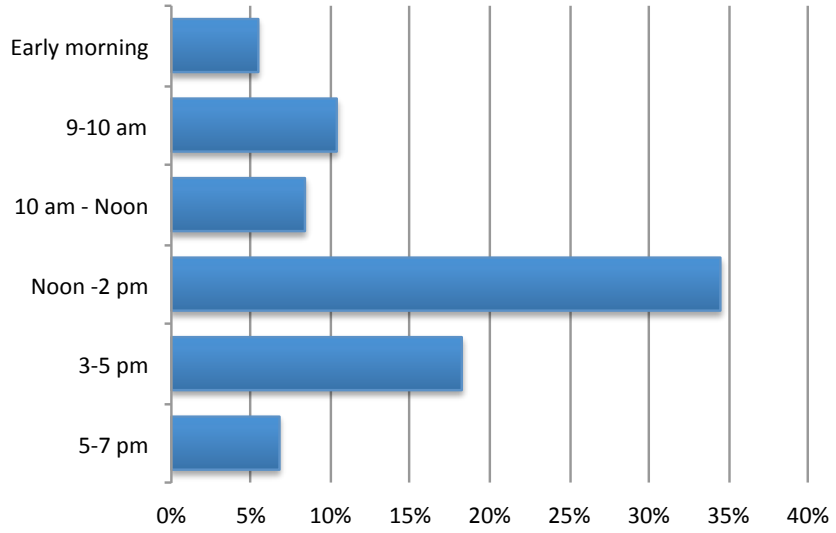
Table 5-4. Respondent rankings of media against other media on ski/snowboard equipment purchases

	Ranking									
Category	1	2	3	4	5	6	7	8	9	Mean
Peer-reviews	326	39	29	12	7			1		1.41
Vendor website	254	43	33	15	5	1	1			1.53
Magazine	251	43	39	12	6	2				1.54
Retailer notifications	212	40	27	10	11	1				1.58
Online publication	209	49	34	14	3	1	1		1	1.61
Social Media	148	29	24	11	8	6	1			1.78
Email	145	52	27	13	6	3	2	1		1.82
Radio	105	27	22	10	6	1		1		1.80
Direct Mail	99	21	21	5	7	6	1			1.89
Newspaper	99	25	26	17	4	4	1	1		2.00
Television	90	32	33	10	7	1	3			2.02
Web Sidebars	42	23	21	17	7	4	3			2.56
Other	37	11	3	1						1.40

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Shopping patterns are important for retailers and consumers alike, as higher traffic periods may change the staffing requirements for shops and alter the shopping experience for consumers. **Figure 5-4** shows that for 34% of respondents, the best time of day to shop is between noon and 2 pm. Another 18% indicated they preferred between 3 pm and 5 pm, making the afternoon the best time to shop for the majority of respondents.

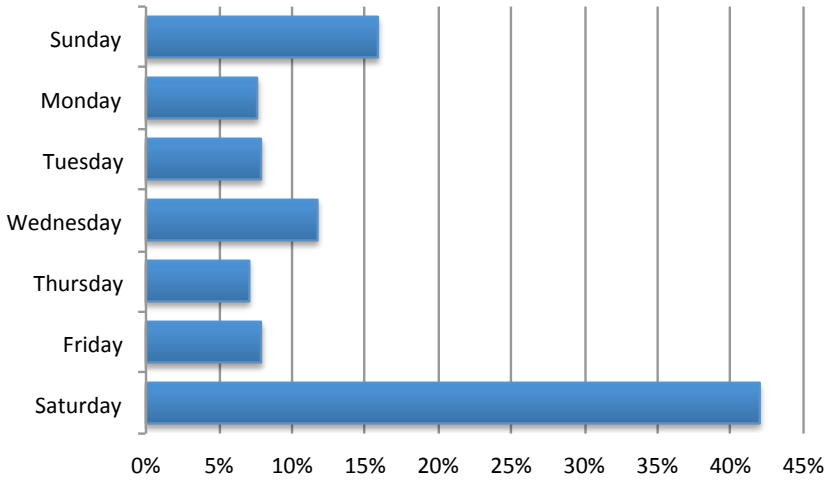
Figure 5-4. Best time of day to shop as reported by survey respondents



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Weekends tend to be busy for the snowsports industry – not only do most of Oregon respondents ski or snowboard on the weekend, but they also prefer to shop on the weekend for snowsports gear. Nearly half (42%) of the respondents indicated that Saturday is the best day of the week to shop for snowsports equipment and apparel, followed by Sunday with 16% of respondents indicating it is the best day to shop, as shown in **Figure 5-5**. The best weekday for respondents to shop is Wednesday (12%).

Figure 5-5. Best day of the week to shop as reported by survey respondents



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Key Findings

- More respondents shopped preseason sales in October (47%) than any other month.
- More respondents said they were signed up for alerts from REI than any other digital retailer or skiing/snowboarding alert service.
- Performance was rated highest as an influence on snowsport equipment influences, followed by price and brand.
- Ski area websites are the most commonly visited source (77%) for current snow/road conditions, followed by the weather forecast (64%), and then the Department of Transportation (37%).
- Ski shops are one of the most common places to purchase snowsport equipment (42%), apparel (34%), and accessories (37%).
- Sporting goods stores are also common places to purchase snowsport equipment (25%), apparel (40%), and accessories (35%).
- Digital media, such as REI mobile apps and Ski & Snow Report iPhone application prove most influential to respondents when making purchases and checking snow or weather conditions.
- Peer reviews were by far the most influential on respondents' equipment purchases. Magazines, vendor websites, online publications, and retailer notifications are second-tier influences. Email and social media appear to be third tier, while more traditional sources such as newspapers, television, and radio are less influential. Web sidebars were ranked least influential by respondents.
- The best time of day for respondents (34%) to shop is between noon and 2 pm.
- Saturday was ranked as the best day to shop.

CHAPTER 6:

ECONOMIC IMPACT ANALYSIS

CHAPTER 6: ECONOMIC IMPACT ANALYSIS

A core objective of this study was to estimate the economic impacts of the Oregon ski industry. ECONorthwest used an expenditure approach within an input-output modeling framework to measure the economic impacts or "contributions" of skiing in Oregon. Input-output models are mathematical representations of the economy and how different parts (or sectors) are linked to one another (See **Appendix C** for a more detailed description of input-output modeling and the IMPLAN model used for this analysis). The input-output modeling relied on expenditures reported by respondents to the University of Oregon's Skier Survey as inputs into an economic model of Oregon. Appendix C also presents summary tables in a format similar to the economic impact studies completed by Dean Runyan Associates completed for Travel Oregon.[64]

Economic Impact Terms and Definitions

Total economic impacts are based on the sum of direct, indirect, and induced impacts.

- **Direct impacts** consist of the direct output—i.e., the proportion of skier spending—that accrues to Oregon businesses, and the jobs and income supported by that spending.

- **Indirect impacts** are the goods and services purchased by businesses that accommodate the direct spending of skiers and snowboarders. This spending generates the first round of indirect impacts. Suppliers to these directly affected businesses will also have to purchase additional goods and services. This spending leads to additional rounds of indirect impacts. Because they represent interactions among businesses, these indirect effects are often referred to as "supply-chain" impacts.

- **Induced impacts.** The direct and indirect increases in employment and income enhance the overall purchasing power in the economy, thereby inducing further consumption—and investment—driven stimulus. Employees at the ski resorts, for example, will use their income to purchase groceries or take their children to the doctor. These induced effects are often referred to as "consumption-driven" impacts.

Economic impacts summarize the changes in output, personal income, and employment resulting from expenditures by skiers in Oregon. The economic activity attributed to this spending will also have fiscal impacts for state and local governments. These impacts will continue annually,

[64] http://www.deanrunyan.com/index.php?fuseaction=Main.TravelstatsDetail&page=Oregon

but vary based on amount of ski-related expenditures. Economic impact measures included in this analysis are:

- **Output** represents the value of goods and services produced, and is the broadest measure of economic activity.
- **Personal income (or labor income)** consists of employee compensation and proprietary income, and is a subset of output.
    - Employee Compensation (wages) includes workers' wages and salaries, as well as other benefits such as health, disability, and life insurance; retirement payments; and non-cash compensation.
    - Proprietary Income (business income) represents the payments received by small-business owners or self-employed workers. Business income would include, for example, income received by private business owners, doctors, accountants, lawyers, etc.
- **Jobs** include both full- and part-time employment.
- **Fiscal impacts** include business taxes incurred during production; personal income taxes; social insurance (employer and employee contributions) taxes; and various other taxes, fines, licenses, and fees paid by businesses and households.

The University of Oregon's Community Service Center conducted a survey of skiers for the 2010-2011 ski season (the Skier Survey). ECONorthwest used skier expenditure data from this survey and the IMPLAN economic impact modeling software to measure the economic impacts of the ski industry in Oregon. The Skier Survey provided the direct expenditures on ski equipment, travel to and from ski destinations, and while at ski destinations. The Skier Survey captured skier spending for the following three categories: (1) ski equipment, (2) day skiers, and (3) destination skiers.

- **Spending on ski equipment** includes skier spending on skis/snowboards, boots, clothing, accessories and rentals.
- **Spending by day skiers** consists of spending on and off the mountain by skiers travelling locally or regionally whose visit to a ski area would not require lodging.
- **Spending by destination skiers** includes spending on and off the mountain by vacation skiers who require overnight accommodations.

Direct Economic Impacts

The first step in the analysis was to develop an estimate of direct economic impacts. The data for direct economic impacts is taken directly

from the Oregon Skier Survey. CPW divided out day and destination impacts based on responses to questions about destination visits.

Table 6-1 reports a summary of skier/snowboarder totals. Based on 2010-11 total visits (1.94 million) and the average annual visits per skier, CPW estimates that there are more than 178,000 active skiers/snowboarders in Oregon. Total visits are from the NSAA report and represent all visits reported to all Oregon ski areas during the 2010-11 season. Day and destination visits were estimates based on survey responses and the analysis presented in Chapter 4. Seventy-eight percent of skier/snowboarder visits in 2010-11 (1,561,030 visits), while about 22% of all skier/snowboarder visits (403,653) during the 2010-11 season were destination visits.

Table 6-1. Skier visits by category, 2010-2011 season

Category	Skier Visits
Total number of skiers	178,608
Number of day visits	1,561,030
Number of destination visits	403,653
Total visits	**1,964,683**

Source: NSAA, estimate of day and destination visits by University of Oregon Skier Survey, 2010-2011 ski season

Table 6-2 reports total spending for the three major skier/snowboarder expenditure categories. **Direct economic impacts for the 2010-11 ski season totaled more than $311 million.**

Table 6-2. Estimated total direct ski spending, by expenditure category, 2010-2011 season

Expenditure Category	Total Spending
Ski equipment	$49,586,902
Day skiers	
Off mountain	$67,272,925
On mountain	$71,435,384
Total day skiers	$138,708,310
Destination skiers	
Off mountain	$68,472,107
On mountain	$54,477,061
Total destination skiers	$122,949,168
Total all categories	**$311,244,379**

Source: University of Oregon Skier Survey, 2010-2011 ski season

The remainder of this section describes each of the expenditure categories in more detail.

Equipment Expenditures

The vast majority of respondents (91%) own their own equipment. Only 9% of respondents indicated they rent equipment. Two-thirds of respondents (68%) indicated that they shopped online for ski/snowboard equipment and accessories.

Table 6-3 summarizes expenditures on ski equipment and accessories for the 2010-11 season. Respondents said that they spent an average of $277.63 on ski equipment during the 2010-2011 season, as shown in Table 6-3. Skis and snowboards represented approximately 41% of sales—$112.70 per person. The next highest spending category is clothing, with respondents spending $78.18 per person. Boots came in third with households spending $48.38 per person.

The results show that total direct economic impact from equipment expenditures is more than $49.5 million.

Table 6-3. Spending on ski equipment and accessories, 2010-2011 season

	Per Person		Total Expenditures	
Category	Dollars	Percent	Dollars	Percent
Skis/Snowboard	$ 112.70	41%	$ 20,129,338	41%
Boots	$ 48.38	17%	$ 8,641,605	17%
Clothing	$ 78.18	28%	$ 13,962,716	28%
Accessories	$ 28.61	10%	$ 5,110,408	10%
Rentals	$ 9.76	4%	$ 1,742,835	4%
Total	**$ 277.63**	**100%**	**$ 49,586,902**	**100%**

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Estimated Day Skier/Snowboarder Expenditures

Table 6-4 shows direct economic impacts of day skiers/snowboarders for the 2010-11 ski season. Direct economic impacts from day skier/snowboarder expenditures totaled $138.7 million for the 2010-11 ski season. Approximately 48% of total day skier/snowboarder expenditures were off-mountain (on services that support the ski/snowboard industry), while 52% is on mountain.

Respondents said that they spent, on average, $88.86 per person, per day for on- and off-mountain goods and services. Looking more closely at off-mountain expenditures, skiers reported spending about $43.10 per person per day for related support services. This equates to a direct economic impact of $67.2 million. More than one-third of off mountain expenditures were on fuel and transportation.

Respondents spent slightly more per person, per day, at the mountain. On-mountain expenditures totaled $71.4 million, or $45.76 per person per day. About two-thirds of on-mountain expenditures are for lift tickets ($33.52 per person per day).

Table 6-4. On- and off-mountain day skier expenditures, 2010-2011 season

Category	Per Person		Total Expenditures	
	Dollars	Percent	Dollars	Percent
Off Mountain (Support Services)				
Fuel/transportation	$ 15.57	18%	$ 24,312,053	18%
Food/beverages	$ 10.97	12%	$ 17,116,933	12%
Rental equipment	$ 7.22	8%	$ 11,272,995	8%
Entertainment	$ 6.00	7%	$ 9,364,181	7%
Other	$ 3.34	4%	$ 5,206,764	4%
Subtotal	**$ 43.10**	**48%**	**$ 67,272,925**	**48%**
On Mountain				
Food/drink	$ 6.02	7%	$ 9,401,615	7%
Rentals	$ 1.80	2%	$ 2,807,981	2%
Lift Tickets	$ 33.52	38%	$ 52,324,319	38%
Ski school	$ 1.93	2%	$ 3,016,066	2%
Retail shop	$ 1.30	1%	$ 2,034,646	1%
Other	$ 1.19	1%	$ 1,850,757	1%
Subtotal	**$ 45.76**	**52%**	**$ 71,435,384**	**52%**
TOTAL	**$ 88.86**	**100%**	**$ 138,708,310**	**100%**

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Estimated Destination Skier/Snowboarder Expenditures

Table 6-5 shows direct economic impacts from destination skier/snowboarder expenditures for the 2010-11 season. Direct economic impacts from destination skier/snowboarder expenditures totaled $122.9 million for the 2010-11 ski season. Approximately 56% of total day skier/snowboarder expenditures occur off-mountain (on services that support the ski industry—$68.5 million), while 44% occur on mountain ($54.5 million).

Respondents said that they spent, on average, $304.59 per person, per day for on- and off-mountain goods and services during destination visits. Looking more closely at off-mountain expenditures, skiers reported spending about $169.63 per person per day for related support services. This equates to a direct economic impact of $68.5 million. More than 42% of off-mountain expenditures were on lodging.

Respondents spent less per person, per day, at the mountain during destination visits. On-mountain expenditures totaled $54.5 million, or $134.96 per person per day. More than 50% of on-mountain expenditures were for lift tickets.

Figure 6-5. Destination visitor spending (per person, per day), 2010-2011 season

Category of Expenditure	Per Person		Total Expenditures	
	Dollars	Percent	Dollars	Percent
Off-Mountain Expenditures				
Lodging	$ 71.90	24%	$ 29,024,113	24%
Retail/gifts	$ 10.38	3%	$ 4,188,513	3%
Drink	$ 15.33	5%	$ 6,187,726	5%
Meals/food	$ 29.91	10%	$ 12,072,456	10%
Entertainment	$ 6.03	2%	$ 2,433,221	2%
Ski equipment	$ 2.59	1%	$ 1,043,986	1%
Fuel/transport	$ 30.58	10%	$ 12,345,325	10%
Ski rentals	$ 2.09	1%	$ 844,442	1%
Other	$ 0.82	0%	$ 332,325	0%
Subtotal	**$ 169.63**	**56%**	**$ 68,472,107**	**56%**
On-Mountain Expenditures				
Food/drink	$ 35.64	12%	$ 14,384,580	12%
Rentals	$ 5.21	2%	$ 2,103,499	2%
Lift Tickets	$ 69.85	23%	$ 28,195,973	23%
Ski school	$ 4.60	2%	$ 1,857,447	2%
Retail shop	$ 9.10	3%	$ 3,674,690	3%
Other	$ 10.56	3%	$ 4,260,872	3%
Subtotal	**$ 134.96**	**44%**	**$ 54,477,061**	**44%**
TOTAL	**$ 304.59**	**100%**	**$ 122,949,168**	**100%**

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Economic And Fiscal Impacts Results

This section presents the results of the IMPLAN economic impact modeling conducted by ECONorthwest.[65] The modeling is based on the direct economic impact data reported by respondents to the Oregon Skier Survey.

Table 6-6 summarizes the economic impacts of the ski/snowboard industry in Oregon across all spending categories. **The total economic impacts associated with the ski industry in Oregon consist of $481.6 million in output, including $194.4 million in personal income, and 6,772 jobs.**

[65] ECONorthwest used economic impact modeling techniques to measure the linkages between this spending and other industry sectors of the state economy. The analysis did not measure potential counterfactual scenarios that consider how skiers would have allocated their money had the ski resorts not have been present, or how the resorts could potentially divert spending away from other Oregon businesses, (in economics, this is referred to as a "substitution effect").

Table 6-6. Total economic impacts of the ski industry in Oregon, 2010-2011 season

Impact Measure	Direct	Indirect	Induced	Total	Multiplier
Economic Output	$258,307,710	$97,149,901	$126,162,865	$481,620,477	1.86
Personal Income	$106,695,016	$38,898,400	$48,789,463	$194,382,879	1.82
Jobs	4,822	826	1,124	6,772	1.40

Sources: ECONorthwest using IMPLAN and skier expenditure data from the University of Oregon Skier Survey, 2010-2011 ski season.

All of the impact measures described in Table 6-6 can be summarized across direct, indirect, and induced impact categories using mathematical formulae to measure and explain what economists refer to as the "multiplier effect." In essence, economic multipliers provide a shorthand way to better understand the linkages between an activity and other sectors of the economy, i.e., the larger the economic multipliers, the greater the interdependence between a company's operations and the rest of the economy. The economic multipliers or the ski industry in Oregon are:

- **Output multiplier is 1.9.** Thus, every million dollars in ski spending generates another $900,000 in spending elsewhere in Oregon.
- **Personal income multiplier is 1.8.** Thus, every million dollars in income directly paid to workers in the ski industry is associated with another $800,000 in income for workers in other sectors of the Oregon economy.
- **Job multiplier is 1.4.** Every ten direct jobs in the ski industry are linked, on average, to another four jobs elsewhere in Oregon.

Table 6-7 shows total economic impacts of the ski industry in Oregon, by sector for the 2010-11 season. The results show that:

- Total economic output is estimated at $481.6 million (e.g., direct, indirect and induced impacts)
- Personal income is estimated at $194.4 million for all sectors
- Total employment is estimated at 6,772 jobs

Not surprisingly, the results show that the vast majority of economic impact is in the service sector (73% of total economic output, 66% of personal income, and 75 percent of jobs). Trade is the sector with the next largest economic impact—$82.1 million in total economic output, $48.3 million in personal income, and 1,426 jobs.

Table 6-7. Total economic impacts of the ski industry in Oregon, by sector, 2010-2011 season

Aggregate Industry Sector	Output	Personal Income	Jobs
Agriculture	$1,777,000	$575,000	28
Mining	$515,000	$102,000	4
Construction	$2,811,000	$1,358,000	23
Manufacturing	$19,300,000	$3,920,000	74
Transportation, Information, Utilities	$15,245,000	$6,545,000	98
Trade	$82,174,000	$48,297,000	1,426
Service	$351,322,000	$129,835,000	5,079
Government	$8,477,000	$3,751,000	41
Total	**$481,621,000**	**$194,383,000**	**6,772**

Sources: ECONorthwest using IMPLAN and skier expenditure data from the University of Oregon Skier Survey, 2010-2011 ski season.

IMPLAN also estimates local fiscal impacts (e.g., taxes). **Table 6-8** shows that total fiscal impacts of the Oregon ski industry in 2010-11 were just under $40 million. Property tax impact makes the biggest contribution to state and local fiscal impacts. The next biggest revenue source is income tax at $8.7 million.

Table 6-8. Total state and local fiscal impacts of the ski industry in Oregon, 2010-2011 season

Type of Revenue	Amount
Corporate profits and dividends	$1,078,000
Property taxes	$18,144,000
Income taxes	$5,899,000
Other taxes	$8,726,000
Fees and other non-taxes	$5,778,000
Social insurance taxes	$347,000
Total State and Local	$39,972,000

Sources: ECONorthwest using IMPLAN and skier expenditure data from the University of Oregon Skier Survey, 2010-2011 ski season.

Table 6-9 provides economic impacts for each of the major skier expenditure categories. The totals combine to equal the total economic impact of the ski industry in Oregon.

Table 6-9. Economic impacts from the ski industry in Oregon, by major expenditure category, 2010-2011 season

Expenditure Category / Impact Measure	Direct	Indirect	Induced	Total
Spending on Equipment				
Economic Output	$29,524,000	$10,595,000	$15,826,000	$55,945,000
Personal Income	$14,275,000	$4,364,000	$6,120,000	$24,759,000
Jobs	454	88	141	684
Spending by Day Skiers				
Economic Output	$121,471,000	$45,029,000	$59,517,000	$226,017,000
Personal Income	$50,772,000	$18,070,000	$23,016,000	$91,859,000
Jobs	2,407	390	530	3,327
Spending by Destination Skiers				
Economic Output	$107,312,000	$41,526,000	$50,820,000	$199,658,000
Personal Income	$41,648,000	$16,464,000	$19,653,000	$77,765,000
Jobs	1,961	348	453	2,761

Sources: ECONorthwest using IMPLAN and skier expenditure data from the University of Oregon Skier Survey, 2010-2011 ski season.

Ski equipment manufacturing in Oregon

Manufacture of snowsports equipment makes significant economic contributions, but estimating the economic impacts with any degree of precision is difficult. Athletic & Outdoor Gear and Apparel has been identified by the Oregon Business Council in their 2010 Business Plan[66] as an "innovative industry cluster." Athletic & Outdoor Gear and Apparel encapsulates equipment needed for participation in a variety of outdoor sports, including skiing and snowboarding. The presence of this cluster is evident in Oregon, especially those high-profile firms such as manufacturers Nike, Columbia, and Adidas, all of whom are based and have locations in Portland.

As noted by a white paper prepared for the Portland Development Commission, the Oregon Business Development Department, and the Oregon Business Council, Oregon's Athletic & Outdoor Gear and Apparel cluster is comprised of more than 300 firms, employing in excess of 14,000 Oregonians. Additionally, the cluster captures about 3,200 self-employed individuals with sales totaling approximately $100 million annually.[67] The cluster was prioritized in four initiatives of the 2011 Oregon Business Plan to help grow existing businesses in this cluster, as well as attract new businesses of this kind to Oregon.[68] Specifically,

[66] "Oregon Business Plan," 2010. http://www.oregonbusinessplan.org/Industry-Clusters/About-Oregons-Industry-Clusters/Athletic-Outdoor-Gear-and-Apparel.aspx, Accessed 16 July 2012.
[67] Cortright, Joseph. Impresa Economics, "Athletic and Outdoor Industry Cluster: A White Paper" 2010.
[68] "Oregon Business Plan Summary," 2011 http://www.oregonbusinessplan.org/LinkClick.aspx?fileticket=S9IUs2NzNP0%3d&tabid=146, Accessed 18 July 2012.

Sporting and Athletic Goods Manufacturing, as reported under NAICS code 33992 within Oregon, is comprised of 70 business units, in total providing covered wages of $39.8 million, and an average annual covered employment of 1,017.[69]

Twenty-seven member companies of Snowsports Industries of America are based in Oregon, evidence of a robust manufacturing base for snowsports companies throughout the nation.[70] The strength of this cluster in Oregon "is tightly bound up in the skills, interests, and values of its workers, and the strong interconnections with the local tendencies for active living, sustainability, and innovation" present in this state.[71]

Data cannot be disaggregated to derive conclusive information regarding employment or economic impact of the companies represented by this cluster specifically for snowsports-related manufacturing. Because the snowsports area sub-group is undifferentiated in collection of manufacturing data from parent companies in Oregon, concrete determination of economic impacts from this sector presents a variety of challenges. To accurately portray the contribution of manufacturing to the larger discussion of economic impacts presented in this study, a direct survey of snowsport equipment and apparel manufacturers in Oregon would be required to ascertain employment and revenue derived specifically from the manufacture of snowsports equipment and apparel.

[69] Oregon Employment Department, Worksource QualityInfo.org, http://www.qualityinfo.org/olmisj/CEP?action=industry&indtype=N&areacode=01000000&indcode=50C313399200 Accessed 17 June 2012.
[70] "SIA Snowsports Directory" January 2012, http://www.snowsports.org/gatekeeper/gatekeeper.asp?id=316
[71] Cortright, Joseph. Impresa Economics, "Athletic and Outdoor Industry Cluster: A White Paper" 2010.

Key Findings

- Based on 2010-11 total visits (1.94 million) and the average annual visits per skier, CPW estimates that there are more than 178,000 active skiers in Oregon.
- Seventy-eight percent of skier visits in 2010-11 (1,561,030 visits) were day visits, while about 22% of all skier visits (403,653) during the 2010-11 season were destination visits.
- Direct economic impacts for the 2010-11 ski season totaled more than $311 million.
- Total direct economic impact from equipment expenditures is more than $49.5 million.
- Direct economic impacts from day skier/snowboarder expenditures totaled $138.7 million for the 2010-11 ski season. Approximately 48% of total day skier/snowboarder expenditures were off-mountain (on services that support the ski industry), while 52% is on mountain.
- Direct economic impacts from destination skier/snowboarder expenditures totaled $122.9 million for the 2010-11 season. Approximately 56% of total destination skier/snowboarder expenditures are off-mountain (on services that support the ski industry--$68.5 million), while 44% is on mountain ($54.5 million).
- The total economic impacts associated with the ski/snowboard industry in Oregon consist of $481.6 million in output, including $194.4 million in personal income, and 6,772 jobs.
- Total fiscal impacts of the Oregon ski/snowboard industry in 2010-11 were just under $40 million. Property tax impact makes the biggest contribution to state and local fiscal impacts. The next biggest revenue source is income tax at $8.7 million.

CHAPTER 7:

PERCEPTIONS OF SUSTAINABILITY

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As a strong economic sector in Oregon with a significant representation of recreational visitors to Oregon's national forests and other public land, the ski and snowboard industry is confronted with the challenge of becoming more sustainable. Oregon currently hosts 12 active ski areas, 11 of which are located on National Forest System land and are permitted by the USDA-FS.

Congress favors ski areas, recognizing their role as economic drivers for many rural communities through policy at the national level, most recently in November of 2011 with the "Ski Area Recreational Opportunity Enhancement Act of 2011." Revisions included the expansion of summer recreational activities, such as zip lines, mountain bike terrain parks and trails, and Frisbee golf courses on public lands already permitted to ski areas. Though many have been capitalizing and/or relying on summer visitors for years, opportunities exist for economic development of special use permitted land, much of which has a smaller "footprint" than resource extraction activities. By allowing ski areas to operate as recreational facilities year-round, concerns focus on greater impacts exerted on permitted areas by recreational activities.

As outdoor recreation enthusiasts, skiers and snowboarders depend greatly on weather in order to participate in snowsports.[72] Of the 486 ski areas operating nationally in 2010-11, 180 or 37% of ski areas currently subscribe to the "Sustainable Slopes" Environmental Charter enacted in 2000. Eight of Oregon's twelve ski resorts signed up as charter members of Sustainable Slopes, promising to address the issues surrounding sustainability, climate change, and the impact their operations had on the future of snowsports. Sustainable Slopes defines ski area sustainability through twenty-one criteria ranging from habitat protection and preservation of watershed resources, to addressing issues related to energy efficiency, climate change, and other environmental policies and practices. These criteria provide a wide spectrum of environmentally- and conservation-oriented tactics that contextualize sustainability within the snowsports industry. Though conceptions vary regarding the purpose of sustainability practices, many of the Sustainable Slopes tactics provide benefits, both financial and otherwise, beyond their primary environmental orientation.

Questions posed to respondents centered on a range of facets that contribute to sustainability. Respondents to this survey were not given an explicit definition of sustainability, rather the survey allowed for

[72] "Ski areas operate within, and are dependent on, natural systems including ecological, climatic and hydrological systems. These dynamic systems can affect our operations, just as we affect them. We are committed to working with stakeholders to help understand and sustain the diversity of functions and processes these systems support" Sustainable Slopes, 2005, p. 5.

responses based on one's own interpretation. CPW's questions addressed the value ski resorts in Oregon provide as a component of public lands and the national forest system. From the responses garnered, this report speaks to the perceived roles ski areas assume in Oregon. CPW's questions did not address actual efforts ski areas may be making toward sustainable operations.

Given the complex nature of public land uses, particularly as it relates to the permitting and operation of ski areas, this chapter explores how the Oregon skier population perceives the ski industry, the role ski areas play in the management of public land, and the importance of sustainability to Oregon snowsports participants. CPW structured the survey to broadly assess Oregon snowsports participants' perceptions of the role of the ski/snowboard industry in their state, providing the basis for understanding how sustainability factors into skiers' and snowboarders' decision-making. Ultimately, the results of this study indicate that the topic of sustainability within the ski industry is an area deserving more attention. Future research is needed to explore opportunities to promote ski area operations as a sustainable economic asset in Oregon.

Skier/Snowboarder Perceptions

Responses shown in **Table 7-1** provide a summary Oregon skiers/snowboarders' perception of Oregon ski areas. About 85% of respondents agreed or strongly agreed skier areas complement other recreational opportunities in national forests. Nearly 76% of respondents strongly agreed or strongly agreed that ski areas in Oregon add to the state's economic base, second in overwhelming support only to ski areas as complementary recreation opportunities in the national forest. Respondents were hesitant to disagree with any of the perceived roles attributed to Oregon ski areas, representing no more than 9% of any response.

Table 7-1. Perceived Role of Ski Areas in Oregon

Role	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Ski areas provide environmental stewardship	2%	6%	34%	**39%**	19%
Ski areas complement other recreational opportunities in National Forests	1%	2%	11%	**55%**	30%
Ski areas maange public land in the public interest	2%	7%	22%	**45%**	24%
Ski areas fulfill the National Forest Service's mission	1%	5%	33%	**37%**	24%
Ski areas generate revenue for the State of Oregon	1%	3%	19%	37%	**39%**

Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

With nearly all of Oregon's ski areas operating on public land, land management that appropriately balances public interests with ecosystem health and economic pressures becomes pertinent to ski area operations. Results represented in **Table 7-1** explain that ski areas' role providing

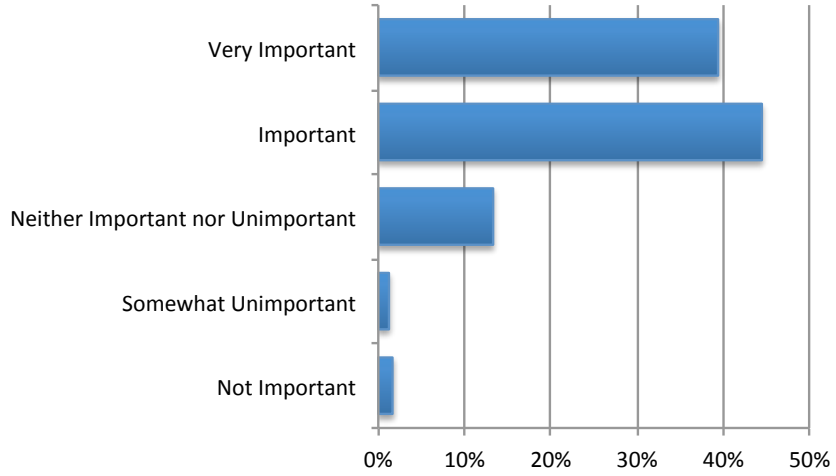
management of public land is well agreed upon. With nearly 70% of respondents agreeing, participants reinforce the relationship of USDA – FS special use permits with a multiple-use, land management ethic and progressive best management practices.

To provide environmental stewardship of permitted public land for ski area operations, ski areas often consider the implications of their operations on surrounding areas. Decision-making structures and standard operating procedures are bound by environmental legislation, but have the ability to steward operational choices that protect ecosystems. Though more than 34% of Oregon skiers and snowboarders do not feel strongly either way, overall agreement of more than 58% of participants believe that it is the ski areas' role to provide environmental stewardship.

Importance of Sustainability

Parallel to responses summarized by **Table 7-1**, 84% of respondents said that sustainability is either very important or important to them personally—sustainability can be identified as a core tenant of Oregon skiers and snowboarders, as shown in **Figure 7-1**.

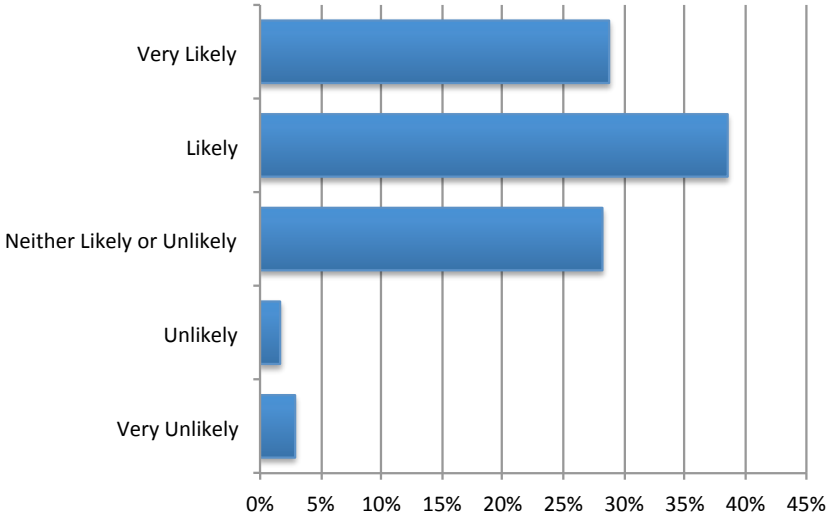
Figure 7-1. Importance of sustainability to respondents



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

In search of a valued ski/snowboard experience and satisfaction of individual needs, patrons of a ski resort may wish to feel aligned with a ski area's management norms. **Figure 7-2** summarizes the influence operational norms have on decision-making. By specifically looking at the likelihood of frequenting a particular ski area based on its operations policies, the importance of environmentally aware operations in Oregon skier/snowboarder decision-making is significant. More than 67% of respondents indicated that they would be very likely or likely to patronize a ski resort based on its environmentally conscious policies and operations.

Figure 7-2. Likelihood of patronizing a ski area based on environmentally conscious policies and operations

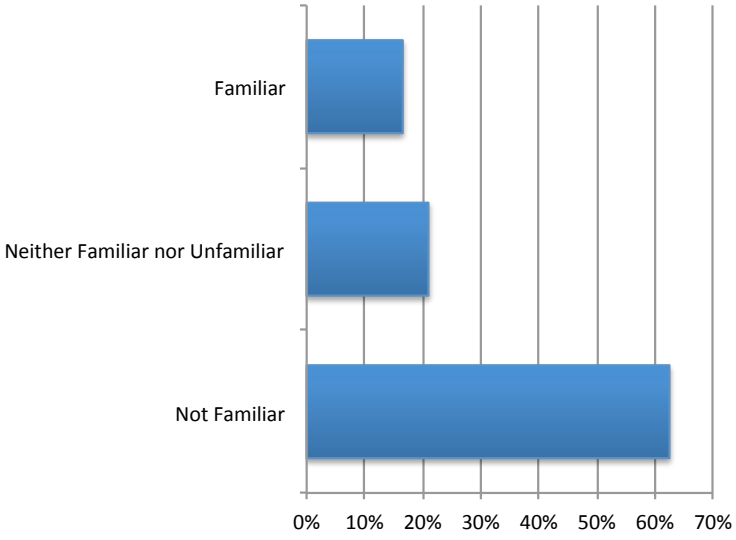


Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

Sustainable Slopes

The National Ski Areas Association's Sustainable Slopes Program has a presence in Oregon, despite nearly 83% of Oregon skiers and snowboarders' unfamiliarity with the initiative, as shown in **Figure 7-3**.

Figure 7-3. Familiarity with Sustainable Slopes



Source: Community Planning Workshop, Ski Oregon Economic Impact Study, 2012.

The eight charter member ski areas of the Sustainable Slopes Program in Oregon are:

- Anthony Lakes
- Mt. Ashland
- Mt. Bachelor
- Hoodoo
- Mt. Hood Meadows
- Mt. Hood Skibowl
- Timberline
- Willamette Pass

Many respondents reported one of these eight ski areas as the ski area they visited most often and/or their favorite ski area. Respondents who were more likely to consider environmentally conscious operations in their decision-making were three times less likely to be familiar with the Sustainable Slopes Program. Similarly, respondents who indicated sustainability is important to them personally were over three times less likely to be familiar with the Sustainable Slopes Program.

Implications

The evidence presented here suggests that skiers and snowboarders in Oregon will positively respond to environmentally oriented operational changes (sometimes called "sustainable business practices"). Not only could regionally-competitive ski areas (ski areas in proximity to the same gateway community) use these sustainable business practices to reduce waste, save money, and gain market share against their competitor; they may also be able to establish greater participant loyalty.

With a passion for both snowsports and environmental resources, the results of this study show that Oregon participants want to know that their ski area is "doing its part" in protecting environmental resources. Desiring a more positive experience, skiers and snowboarders are seeking superior value in their ski area's operations, in keeping with their preferences to conserve environmental resources. As respondents indicated, ski areas provide complementary recreational opportunities to other uses of national forest in Oregon; skiers and snowboarders are looking for ways to maintain the availability of these opportunities without damaging the future opportunities of future generations. Not only do Oregon skiers and snowboarders have a desire to preserve environmental resources, but they may also seek to assure the continuation of Oregon's rich ski tradition.

Key Findings

- Sustainability is important or very important to 84% of respondents.
- Eighty-five percent of respondents believe that ski areas complement other recreational activities in the national forest.
- Just under 70% of respondents perceive ski areas to manage public land in the public interest.
- Nearly 61% of respondents agree that ski areas fulfill the National Forest Service's mission.
- Over three-quarters of respondents perceive ski areas to generate revenue for the state of Oregon.
- Fifty-eight percent of respondents perceive ski areas to provide environmental stewardship.
- Over 67% of respondents indicated that they would be more likely to patronize a ski resort based on its environmentally conscious policies and operations.
- Eight of Oregon's 12 ski areas are charter members of the National Ski Areas Association's Sustainable Slopes Program
- Eighty-three percent of respondents were not familiar with Sustainable Slopes Program.

APPENDIX A: SURVEY METHODOLOGY

Appendix A describes of the methods used to develop and administer the Oregon Skier Survey.

CPW developed and administered an online survey that was intended to develop a detailed "profile" of Oregon skiers and snowboarders. That profile includes information about visitation, shopping, and expenditure behaviors.

Sampling of snowsports participants poses challenges due to the nature of skiing and snowboarding. In the interest of weighing quality and randomness of responses, convenience to respondents (e.g., limiting interruption of skiers and riders during their activities), ease of distribution, weather conditions, human resources, and ease of collecting information, CPW administered the survey online. To solicit responses, potential respondents received an email with a link requesting them to respond to the survey.

The goal of the survey sampling was to obtain a representative sample (i.e., statistically valid) of visitors to all 13 Oregon ski areas during the 2011-12 season. In obtaining a statistically valid sample, the findings may be generalized to represent the whole population of Oregon skiers/snowboarders.

Sampling

A random sample Oregon skiers and snowboarders was achieved via two methods:

- For larger ski resorts respondents were randomly selected from ski area email distribution lists provided by area staff and contacted by email;
- For smaller resorts, skiers were asked to participate at the lift ticket window by offering their email address on business reply postcards, which were returned to the UO. Potential respondents were then contacted via email to complete the survey.

Oregon's twelve operating ski areas were invited to participate in the sampling phase. Mt. Hood Meadows, Timberline, and Hoodoo supplied CPW with email lists. Ski Bowl and Mt. Bachelor randomly sampled approximately 1,000 guests through their proprietary visitor lists. Cards were distributed at Willamette Pass, Mt. Ashland, Anthony Lakes, and Cat Ski Mt. Bailey. Spout Springs and Warner Canyon were, as a result of the snow conditions, were unable to open for the majority of the season. Cooper Spur's sample was combined with Mt. Hood Meadows as their operations are managed together.

To broaden sample coverage, CPW obtained email lists of season pass holders, skiers who purchased their tickets online, ski team/club members, and e-news alert email lists. Area operations staff provided CPW with approximately 1,000-3,000 email addresses, no more than half of which were season pass holders. Ski areas participating in this part of the sampling included Mt. Hood Meadows, Mt. Hood Ski Bowl, Hoodoo, and Timberline). CPW then selected a random sample from each ski area's list with the objective of obtaining a sample ratio for each ski area that was relative to the share of skier visits from the 2010-11 season, as reported by the Pacific Northwest Ski Areas Association.

For those individuals who frequented smaller Oregon ski areas, every tenth skier or rider who purchased a lift ticket was asked to participate at the point of sale by offering their email address on pre-addressed business reply postcards. Skiers had the option to complete the postcard and mail it back, or to provide them to lift ticket sales staff who returned the postcards to CPW.

Table A-1 shows a comparison of the number of responses compared to the number of skier visits in the 2010-11 season (final skier counts from the 2011-12 season were not available at the time this report was completed).

Table A-1. 2010-11 Ski Area Visits to Responses

	Survey Responses		2010-11 Visits	
Ski Area	Number	Percent	Number	Percent
Anthony Lakes	3	0.4%	24,528	1.2%
Cooper Spur	1	0.1%	9,214	0.5%
Hoodoo	120	14.3%	85,077	4.3%
Mt. Ashland	24	2.9%	78,708	4.0%
Mt. Bachelor	159	18.9%	489,572	24.9%
Mt. Bailey (snowcat)	0	0.0%	426	0.0%
Mt. Hood Meadows	306	36.3%	469,926	23.9%
Mt. Hood Skibowl	50	5.9%	400,000	20.4%
Spout Springs	0	0.0%	10,986	0.6%
Summit (n-m)	0	0.0%	nr	-
Timberline	123	14.6%	340,657	17.3%
Warner Canyon	0	0.0%	3,200	0.2%
Willamette Pass	56	6.7%	52,389	2.7%
Total	**842**	**100.0%**	**1,964,683**	**100.0%**

Note: Data from the 2011-12 season were not available at the time this report was completed. Spout Springs and Warner Canyon did not operate during the 2011-12 season. NR = not reported

A key concern of organizations that conduct surveys is statistical validity. CPW estimates the overall population of active skiers in Oregon at about 162,000. If one were to assume that the 2012 sample was perfectly random *and* that there was no response bias, then the survey would have

a margin of error of ±3.37% at the 95% confidence level. In simple terms, this means that if a survey were conducted 100 times, the results would end up within ±3.37% of those presented in this report.

One limitation of the study's methodology is potential for response bias from the online survey. Based on comparisons with the demographic data reported by Snowsports Industries of America and National Ski Area Association, along with key similarities to reports issued by neighboring industries, the sample collected for this study can be considered representative of skiers in Oregon. See Chapter 3 for more detailed analysis of demographic data.

Survey Development and Administration

CPW worked closely with a subcommittee of the Ski Oregon board and staff to develop the survey instrument. The initial survey instrument was based on the 1988-89 survey. Many elements of the ski industry changed since 1988-89, so the survey was substantially modified from the base survey.

CPW then field tested the survey on a small sample (~12) of individuals to receive feedback on the structure and flow of the survey. The field test resulted in additional refinements to the survey instrument.

The Oregon Skier Survey was comprised of seven sections, administered online using Qualtrics software (See Appendix B):

- Skier/Boarder Characteristics
- Ski Equipment and Shopping patterns
- Trip Characteristics
- Visit Characteristics
- Destination Visits
- Ski Industry Perceptions
- Demographics

Limitations

Many Oregon ski areas were unable to open or stay open for much of December, some intermittently closed well into January. The result of this was that CPW did not obtain a sample that was proportionally representative of all of the Oregon ski areas. While this limits analysis of the results at the individual ski area level, it does not bias the overall sample.

As a result of a late start to the season, many destination visitors who typically visit Oregon Ski Areas on destination vacations during the Winter Holiday season were not representatively sampled in this study.

APPENDIX B: SURVEY INSTRUMENT

This appendix presents a copy of the online survey instrument. Please note that the survey looked considerably different in the online version. Much of the formatting is lost. Moreover, the survey had several skip sequences. The online survey software does not display questions that are skipped based on specific responses.

Economic Impact Study

General Skier/Boarder Characteristics

Thank you for participating in this survey!

We are excited to learn more about skiers and riders in Oregon. The purpose of this survey is to determine the preferences of individuals and households that participate in snowsports at Oregon ski areas. Ski Oregon will use the results to better meet the needs of Oregon skiers and snowboarders and to develop estimates of the economic impacts of the Oregon ski industry. Your input is an invaluable contribution towards achieving these results.

The survey asks a series of questions about your visitation patterns, expenditures on equipment, accessories, and visits, and your ski vacations. Please answer the questions on behalf of yourself and your household.

Thanks again.

First, please tell us about your 2010-11 ski season.

Please indicate the snowsports activities in which you participated in the 2010-2011 season? (Check all that apply)

- ☐ Downhill skiing
- ☐ Cross country skiing
- ☐ Snowboarding
- ☐ Telemark skiing
- ☐ Snowmobiling
- ☐ Snowshoeing
- ☐ Tubing
- ☐ Backcountry skiing
- ☐ Other

Approximately how many days did you visit the **mountains** during the 2010-11 Winter?

Approximately how many days do you **ski/snowboard** during the 2010-11 season?

Please estimate the percentage of your ski days during the 2010-11 season which were:

Weekdays	0 %
Weekends	0 %
Holiday Weekends	0 %
Holidays	0 %
Nights	0 %
Total	0 %

At which Oregon ski areas have you skied/boarded? (Check all that apply)

- ☐ Anthony Lakes
- ☐ Timberline
- ☐ Cat Ski Mt. Bailey
- ☐ Mt. Bachelor
- ☐ Mt. Hood Meadows
- ☐ Mt. Ashland
- ☐ Hoodoo
- ☐ Mt. Hood Skibowl
- ☐ Spout Springs
- ☐ Cooper Spur
- ☐ Warner Canyon
- ☐ Willamette Pass

What is your favorite ski area in Oregon?

What area do you ski/ride at most often in Oregon?

Are you a season passholder?

- ○ Yes
- ○ No

At which resort(s) do you have a season pass?

- ☐ Anthony Lakes
- ☐ Timberline
- ☐ Cat Ski Mt. Bailey
- ☐ Mt. Bachelor
- ☐ Mt. Hood Meadows
- ☐ Mt. Ashland
- ☐ Hoodoo
- ☐ Mt. Hood Skibowl
- ☐ Spout Springs
- ☐ Cooper Spur
- ☐ Warner Canyon
- ☐ Willamette Pass

Where do you prefer to purchase your lift tickets/season pass? (select only one)

- ○ At the mountain
- ○ Ski shop
- ○ Online
- ○ Other

Please indicate your ability for the following winter sports:

	Never tried	Beginner	Intermediate	Advanced	Expert
Downhill Skiing	○	○	○	○	○
Snowboarding	○	○	○	○	○
Cross-country Skiing	○	○	○	○	○
Telemark Skiing	○	○	○	○	○

How many years have you been skiing/boarding?

With whom do you usually ski/ride? (check all that apply)

- ☐ Alone
- ☐ Family
- ☐ Friends
- ☐ Groups (ski clubs, etc.)
- ☐ Both friends and family

During which months did you ski/board of the 2010-11 season? (Check all that apply)

Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

How many days did you spend skiing/riding non-lift served terrain (backcountry) during the 2010-11 season?

Do you _____ your ski/snowboarding equipment?

- ○ Own
- ○ Rent

How many people in your household ski/ride?

1	2	3	4	5	6	7 or more
○	○	○	○	○	○	○

How many of those who ski/ride are under 18?

0	1	2	3	4	5 or more
○	○	○	○	○	○

Ski Equipment and Shopping Patterns

Next, we would like to ask some questions about snowsports equipment and accessory purchases.

Do you shop pre-season ski/snowboard sales?

- ○ Yes
- ○ No

Which months of the year do you shop pre-season sales? (Check all that apply)

- ☐ July
- ☐ August
- ☐ September
- ☐ October
- ☐ November

Do you shop online for ski/snowboard equipment and accessories?

- ○ Yes
- ○ No

Please estimate the amount spent in 2011 for ski equipment and accessories total for all individuals in your household.

		Dollars spent in 2011
Skis/Snowboard		$ 0
Boots		$ 0
Clothing		$ 0
Accessories		$ 0
Rentals		$ 0
Total		$ 0

Where did you last purchase the following items: (check all that apply)

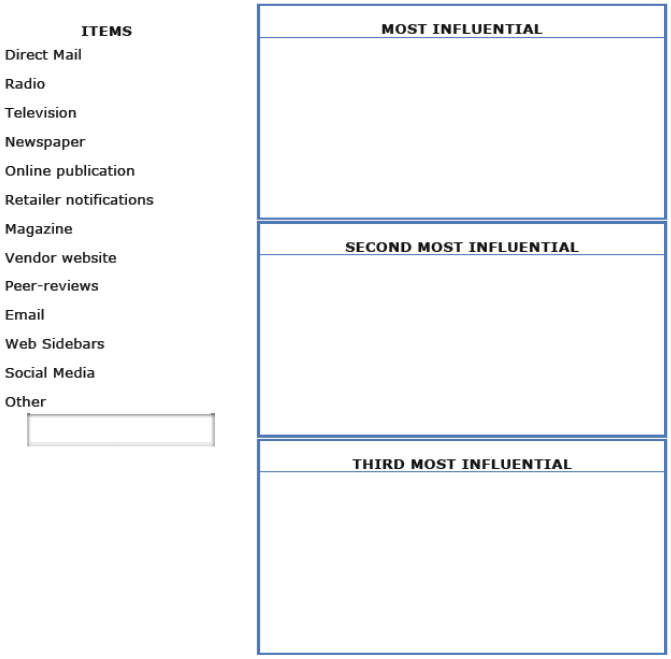
		Ski shop	Ski swap	Ski area	Sporting goods store	Online vendors	Department store	Ski show
Snowsports Equipment		☐	☐	☐	☐	☐	☐	☐
Snowsports Apparel		☐	☐	☐	☐	☐	☐	☐
Snowsports Accessories		☐	☐	☐	☐	☐	☐	☐

What time of day and day of week are best for you to shop during the season?

Day of week

Time of day

What media has the most influence on your winter sports equipment buying decision(s)? (Drag and drop to rank your top 3)



Do you subscribe to snowsport-related email lists, deal alerts, or smartphone applications?

- Yes
- No

Which list/alert/app do you find the most influential?

What influences your snowsport equipment buying decisions most? (Please place the items in rank order – 1 most important, 6 least important – by dragging the item to the appropriate rank)

Brand
Advertising
Performance
Price
Friends
Color

Trip Characteristics

Please tell us about how you travel to and from the ski area.

How do you get information on current snow/road conditions? (Check all that apply)

- ☐ Snow phone
- ☐ Ski shop
- ☐ Ski area website
- ☐ Television
- ☐ Radio
- ☐ Text message
- ☐ Email alerts
- ☐ Weather forecast
- ☐ Newspaper
- ☐ Department of Transportation
- ☐ Other

What mode of transportation do you normally use to get to the mountain to go skiing/riding? (Select only one)

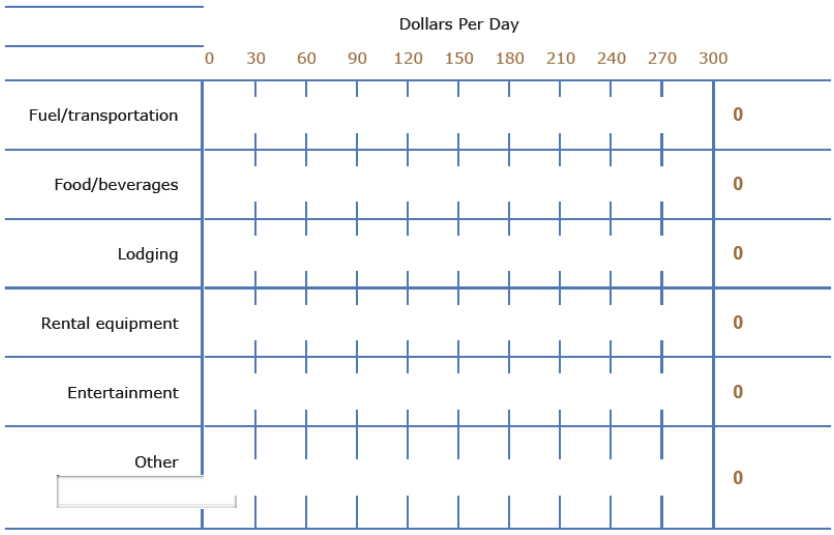
- ○ Car
- ○ Bus
- ○ Carpool
- ○ Other

On average, how far do you travel (in miles), one way, to go skiing/riding?

How many people normally travel with you? (including yourself)

1	2	3	4	5	More than 5
○	○	○	○	○	○

Please give your best estimate of the total amount you spend per person per day on and off (to and from) mountain, on the following items **while en route** to the area where you ski most often.



Visit Characteristics

This section asks questions about your most recent ski visit to an Oregon ski area.

Your most recent visit was at the following ski area:

For the remainder of the survey, please keep in mind the following definitions:

- **ON mountain** spending can be described as dollars spent at on-mountain outlets, such as lift sales, food & beverage locations, or ski school/guides that are operated by the ski area.
- **OFF mountain** spending can be explained as any dollars spent beyond locations operated by the ski area such as nearby restaurants, ski shops, or lodging.

How much, on average, did you spend per person, per day on the mountain on the following items?

Food/drink	$ 0
Rentals	$ 0
Lift Tickets	$ 0
Ski school	$ 0
Retail shop	$ 0
Other	$ 0
Total	$ 0

Please rate the following characteristics for the Oregon ski area that you visit most (1 star = very poor; 5 stars = excellent, blank = not applicable)

Traffic

Parking

Weather

Snow conditions

Slope conditions

Lift lines

Ski terrain

Employees

Food service

Ski school

Childcare

Lodge

Please check the activities or services you used while at the mountain on your last ski trip. (Check all that apply)

- ☐ Ski school
- ☐ Children Ski School
- ☐ Childcare
- ☐ Ski races
- ☐ Food service
- ☐ Bar
- ☐ Childcare
- ☐ X-C trails
- ☐ Terrain Park
- ☐ Mountain guided tour
- ☐ Rental shop
- ☐ Lodge
- ☐ Ski shop

On average, how many hours do you spend **skiing** per day?

	0	1	2	3	4	5	6	7	8	9	10	11	12
Hours spent Skiing													

Destination Visits

For the following questions, we would like to know about your last destination ski vacation. A destination ski vacation is spending 2 or more days skiing and one or more nights away from your primary residence.

Have you taken a destination ski vacation in the last 3 years?

- ○ Yes
- ○ No

Was your destination ski vacation **in Oregon**?

- ○ Yes
- ○ No

The following question is asking about your most recent ski vacation in Oregon.

	How many days did you stay?				How far was your lodging from the ski area?			When was it?	
	2	3	4	5+	< 5 miles	5 - 20 miles	> 20 miles	Month	Year
Resort in Oregon	○	○	○	○	○	○	○		

Was the primary purpose of the trip to participate in snowsports?

- ○ Yes
- ○ No (If No, please indicate what the primary purpose of your trip was)

How much, did you spend during this destination vacation per person, per day **at the mountain** on the following items?

Food/drink	$ 0
Rentals	$ 0
Lift Tickets	$ 0
Ski school	$ 0
Retail shop	$ 0
Other	$ 0
Total	$ 0

Please check the following activities you participated in while on your ski vacation. (Check all that apply)

- ☐ Cross country skiing
- ☐ Snowmobiling
- ☐ Swimming/hot tub
- ☐ Health club/Spa
- ☐ Shopping
- ☐ Sightseeing
- ☐ Nightclubs
- ☐ Movies
- ☐ Business/Trade Conference
- ☐ Wine Tasting
- ☐ Fine Dining
- ☐ Festivals
- ☐ Concerts
- ☐ Race Events
- ☐ Pub/craft beer tours
- ☐ Tubing
- ☐ Other

Please estimate your average per person per day expenditures **off the mountain** on the following items while on your ski vacation.

Lodging	$ 0
Retail/gifts	$ 0
Drink	$ 0
Meals/food	$ 0
Entertainment	$ 0
Ski equipment	$ 0
Fuel/transport	$ 0
Ski rentals	$ 0
Other	$ 0
Total	$ 0

Do you plan to take future destination ski vacations in Oregon?

- ○ Yes
- ○ No (if No, why not?)

What could make Oregon a more attractive ski destination?

Ski Industry Perceptions

The following section asks questions about your perceptions about the ski industry.

What do you perceive as the role of ski areas in Oregon?

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Ski areas provide environmental stewardship	O	O	O	O	O
Ski areas complement other recreational opportunities in National Forests	O	O	O	O	O
Ski areas manage public land in the public interest	O	O	O	O	O
Ski areas fulfill the National Forest Service's mission	O	O	O	O	O
Ski areas generate revenue for the State of Oregon	O	O	O	O	O

How familiar are you with the Sustainable Slopes program?

- O Familiar
- O Neither Familiar nor Unfamiliar
- O Not Familiar

Have you ever filled out a Sustainable Slopes scorecard for a resort you visited?

- O Yes
- O No

How likely would you be to patronize a ski area if you knew they followed environmentally-conscious policies and operations?

Very Unlikely	Unlikely	Neither Likely or Unlikely	Likely	Very Likely
O	O	O	O	O

How important is sustainability to you, personally?

- O Very Important
- O Important
- O Neither Important nor Unimportant
- O Somewhat Unimportant
- O Not Important

Demographics

Please tell us about yourself and your household.

Please indicate your age and sex.

Age

How many people live in your household?

How many people in your household are under age 18? (write 0 if none)

Please check the category which best describes your total household income.

- Less than $10,000
- $10,000 to $14,999
- $15,000 to $24,999
- $25,000 to $34,999
- $35,000 to $49,999
- $50,000 to $74,999
- $75,000 to $99,999
- $100,000 to $149,999
- $150,000 to $199,999
- $200,000 or more
- I prefer not to answer.

What is your current marital status?

- Single
- Married

Please check the occupation which most closely fits your present job. (Select only one)

- Professional
- Health care
- Lawyer
- Engineer
- Education
- Sales
- Student
- Executive
- Skilled labor
- Clerical
- Food service
- Retired
- Self-employed
- Unemployed
- Other

Please indicate the highest level of education you have completed.

- Some High school
- High school diploma
- Some college
- College graduate
- Post-graduate work

APPENDIX C: ECONOMIC IMPACT METHODOLOGY AND SUMMARY OF RESULTS

ECONorthwest used an expenditure approach within an input-output modeling framework to measure the economic impacts or "contributions" of skiing in Oregon.

Input-Output Modeling Framework

Input-output models are mathematical representations of the economy and how different parts (or sectors) are linked to one another. The strengths of the input-output modeling framework include:

- A double-entry accounting framework that results in a model structure that is well ordered, symmetric, and where, by definition, inputs must be equal to outputs;
- A reasonably comprehensive picture of the economic activities within a region, with mathematical equations that describe the flow of commodities between producing and consuming sectors, the flow of income between businesses and institutions, and the trade in commodities between regions;
- Model construction using secondary source data that is gathered and vetted by government agencies; and
- The ability to cost-effectively create input-output or economic impact models for any region.

Input-output models that rely on survey or primary source data are expensive to construct and are generally not available for state and regional economies. As a result, special modeling techniques have been developed to estimate the necessary empirical relationships from a combination of national technological relationships, and state- and county-level measures of economic activity. These modeling techniques and data have been packaged into the IMPLAN (for IMpact Analysis for PLANning) modeling software. This is the modeling system ECONorthwest used in this analysis.

IMPLAN Economic Impact Model

IMPLAN has been developed and distributed by the Minnesota IMPLAN Group, Inc., since 1993. Currently there are over 1,500 public and private users of the IMPLAN modeling software. The IMPLAN modeling system is widely used and well respected. The United States Department of Agriculture (USDA) recently recognized the IMPLAN modeling framework as "*one of the most credible regional impact models used for regional economic impact analysis"* and, following a review by experts from seven USDA agencies, selected IMPLAN as its analysis framework for monitoring

job creation associated with the American Recovery and Reinvestment Act (ARRA) of 2009.[73]

In general terms, the IMPLAN model works by tracing how spending associated with an industry circulates through an economy or study area. That is, changes in one sector or multiple sectors trigger changes in demand and supply throughout the economy. Initial changes in the model propagate through the economy via supply- and demand-chain linkages, altering the equilibrium quantities of inputs and outputs and associated jobs, income, value-added. These "multiplier effects" continue until the initial change in final demand leaks out of the economy in the form of savings, taxes, and imports.

In this analysis, ECONorthwest built an economic impact model for the state of Oregon – where much of the spending activity occurs and where all of the ski resorts analyzed in this report are located.

Economic Impact Terms and Definitions

Total economic impacts are based on the sum of direct, indirect, and induced impacts.

- **Direct impacts** consist of the direct output—i.e., the proportion of skier spending—that accrues to Oregon businesses, and the jobs and income supported by that spending.
- **Indirect impacts** are the goods and services purchased by businesses that accommodate the direct spending of skiers. This spending generates the first round of indirect impacts. Suppliers to these directly affected businesses will also have to purchase additional goods and services. This spending leads to additional rounds of indirect impacts. Because they represent interactions among businesses, these indirect effects are often referred to as "supply-chain" impacts.
- **Induced impacts.** The direct and indirect increases in employment and income enhance the overall purchasing power in the economy, thereby inducing further consumption- and investment- driven stimulus. Employees at the ski resorts, for example, will use their income to purchase groceries or take their children to the doctor. These induced effects are often referred to as "consumption-driven" impacts.

Economic impacts summarize the changes in output, personal income, and employment resulting from expenditures by skiers in Oregon. The economic activity attributed to this spending will also have fiscal impacts for state and local governments. These impacts will continue annually,

[73] See excerpts from an April 9, 2009 letter to MIG, Inc., from John Kort, Acting Administrator of the USDA Economic Research Service, on behalf of Secretary Vilsack, at www.implan.com.

but vary based on amount of ski-related expenditures. Economic impact measures included in this analysis are:

- **Output** represents the value of goods and services produced, and is the broadest measure of economic activity.
- **Personal income (or labor income)** consists of employee compensation and proprietary income, and is a subset of output.
    - Employee Compensation (wages) includes workers' wages and salaries, as well as other benefits such as health, disability, and life insurance; retirement payments; and non-cash compensation.
    - Proprietary Income (business income) represents the payments received by small-business owners or self-employed workers. Business income would include, for example, income received by private business owners, doctors, accountants, lawyers, etc.
- **Jobs** include both full- and part-time employment.
- **Fiscal impacts** include business taxes incurred during production; personal income taxes; social insurance (employer and employee contributions) taxes; and various other taxes, fines, licenses, and fees paid by businesses and households.

Caveat

The goal of this research is to assess how skiing contributes to the state economy. To do this, ECONorthwest relied on expenditures reported by respondents to the University of Oregon's Skier Survey as inputs into an economic model of Oregon. We then use economic impact modeling techniques to measure the linkages between this spending and other industry sectors of the state economy. We do not measure potential counterfactual scenarios that consider how skiers would have allocated their money had the ski resorts not have been present, or how the resorts could potentially divert spending away from other Oregon businesses, (in economics, this is referred to as a "substitution effect").

Summary of Economic Impacts

The following tables present a summary of the economic impacts of the Oregon ski industry in a format similar to those in the Travel Oregon studies.

Table C-1. Total Direct Ski Spending, 2010-2011 Ski Season ($ millions)

Spending Category	Spending
Spending on Ski Equipment	$49.6
Spending by Day Skiers	$138.7
Spending by Destination Skiers	$122.9
Total spending	$311.2

Source: University of Oregon Skier Survey, 2010-2011 ski season

Table C-2. Skier Spending by Commodity Purchased, 2010-2011 Ski Season ($ millions)

Commodity	Spending on Ski Equipment	Spending by Day Skiers	Spending by Destination Skiers	Total Ski Spending
Accomodations	$0.0	$0.0	$29.0	$29.0
Food Service	$0.0	$20.5	$26.3	$46.8
Food Stores	$0.0	$6.0	$6.4	$12.4
Local Transportation and Gas	$0.0	$24.3	$12.3	$36.7
Arts, Entertainment, Recreation	$1.7	$80.6	$40.7	$123.1
Retail Sales	$47.8	$7.2	$8.2	$63.3
Total Spending	$49.6	$138.7	$122.9	$311.2

Source: University of Oregon Skier Survey, 2010-2011 ski season

Table C-3. Personal Income from Skier Spending, 2010-2011 Ski Season ($ millions)

Spending Category / Industry	Direct	Indirect	Induced	Total
Spending on Ski Equipment				
Accomodations and food services	$0.0	$0.1	$0.3	$0.4
Arts, entertainment, recreation	$1.0	$0.2	$0.1	$1.3
Retail	$11.7	$0.3	$1.2	$13.1
Ground transportation	$0.6	$0.3	$0.1	$1.0
Other travel	$0.0	$0.3	$0.1	$0.4
Other industries	$1.0	$3.3	$4.3	$8.6
Total Personal Income	$14.3	$4.4	$6.1	$24.8
Spending by Day Skiers				
Accomodations and food services	$7.6	$0.4	$1.1	$9.1
Arts, entertainment, recreation	$29.1	$0.9	$0.5	$30.5
Retail	$13.9	$1.1	$4.3	$19.3
Ground transportation	$0.2	$0.8	$0.4	$1.3
Other travel	$0.0	$0.6	$0.5	$1.2
Other industries	$0.0	$14.3	$16.1	$30.5
Total Personal Income	$50.8	$18.1	$23.0	$91.9
Spending by Destination Skiers				
Accomodations and food services	$17.5	$0.5	$1.0	$19.0
Arts, entertainment, recreation	$12.5	$0.6	$0.4	$13.6
Retail	$11.5	$0.9	$3.7	$16.0
Ground transportation	$0.1	$0.6	$0.4	$1.0
Other travel	$0.0	$0.6	$0.5	$1.0
Other industries	$0.0	$13.3	$13.8	$27.1
Total Personal Income	$41.6	$16.5	$19.7	$77.8
Total Ski Spending				
Accomodations and food services	$25.1	$1.0	$2.4	$28.5
Arts, entertainment, recreation	$42.6	$1.7	$1.1	$45.4
Retail	$37.0	$2.2	$9.2	$48.4
Ground transportation	$0.9	$1.6	$0.9	$3.4
Other travel	$0.1	$1.4	$1.1	$2.6
Other industries	$1.0	$30.9	$34.2	$66.2
Total Personal Income	$106.7	$38.9	$48.8	$194.4

Sources: ECONorthwest using IMPLAN and skier expenditure data from the University of Oregon Skier Survey, 2010-2011 ski season

Table C-4. Jobs from Skier Spending, 2010-2011 Ski Season

Spending Category / Industry	Direct	Indirect	Induced	Total
Spending on Ski Equipment				
Accomodations and food services	0	4	15	18
Arts, entertainment, recreation	18	4	6	28
Retail	405	4	30	439
Ground transportation	9	5	2	16
Other travel	0	6	3	8
Other industries	22	66	86	174
Total Jobs	454	88	141	684
Spending by Day Skiers				
Accomodations and food services	383	19	56	458
Arts, entertainment, recreation	1,631	46	22	1,700
Retail	390	16	111	517
Ground transportation	2	14	8	25
Other travel	0	12	10	21
Other industries	0	283	324	607
Total Jobs	2,407	390	530	3,327
Spending by Destination Skiers				
Accomodations and food services	790	26	48	864
Arts, entertainment, recreation	806	30	19	854
Retail	363	12	95	470
Ground transportation	2	11	7	19
Other travel	0	11	8	19
Other industries	1	257	277	535
Total Jobs	1,961	348	453	2,761
Total Ski Spending				
Accomodations and food services	1,173	50	118	1,341
Arts, entertainment, recreation	2,456	80	46	2,582
Retail	1,158	32	236	1,426
Ground transportation	13	30	17	60
Other travel	0	28	20	49
Other industries	23	606	687	1,316
Total Jobs	4,822	826	1,124	6,772

Sources: ECONorthwest using IMPLAN and skier expenditure data from the University of Oregon Skier Survey, 2010-2011 ski season

Table C-5. Total State and Local Tax and Fee Revenues from Skier Spending, 2010-2011 Ski Season ($ millions)

Spending Category	Revenues
Spending on Ski Equipment	$5.8
Spending by Day Skiers	$18.2
Spending by Destination Skiers	$15.9
Total revenues	$40.0

Sources: ECONorthwest using IMPLAN and skier expenditure data from the University of Oregon Skier Survey, 2010-2011 ski season

APPENDIX E: TRANSCRIPT OF SURVEY COMMENTS

This appendix presents a transcript of comments written by survey respondents on selected survey questions. The comments are presented verbatim without edits.

Where do you prefer to purchase your lift tickets (other)?

- UO Outdoor Program
- Through employer
- web
- Annual Ski Show
- Nike
- Ski show
- sales office
- COSTCO
- I would do on-line if it were an option
- Costco
- at the ski show
- ski club
- Nike
- Employee
- Portland ski show
- Where the best deal is
- At work
- friends
- work
- in town preseason
- realtor
- Corporate
- costco
- Ski show
- Wherever it is cheapest
- ski and snow show
- REI
- Ski Show
- wherever I can get discount tix
- Ski fair
- Nike
- Not applicable
- liftopia
- Winter ecpo
- In Town office
- Property Mgmt co.
- Pre season sales
- Local Ski Shop
- peak sports
- cheapest location
- ski show
- ski show
- Resort Office
- Company discount
- ski and snowboard show

What media has the most influence on your winter sports equipment buying decision(s)?

- broken/worn equipment
- Friend recommendations
- Demo at Mtn
- I want what I want for a good deal.
- Sports store websites
- word of mouth
- none
- Demo
- reviews from friends
- Just go in
- friends
- Friend Recommendation
- Industry friends/reps
- Friend recommendations
- Plain old research
- Coach
- demos
- Ski Shop Advice
- ski expo
- tele web sites
- Clothing: catalogs
- Friends
- Friends in the know
- web reviews
- none
- ski shop

- Feel
- Location
- Weather
- none
- demos
- nothing
- Web search
- Research
- sales folks
- none
- None pos
- testing equipment myself
- Rental of equipment before purchase
- trip to the mainland no ski equipment to purchase in Hawaii
- Ski forums
- sales
- Demo days
- Friends
- I do a lot of web surfing
- proximity of store to work
- local ski swaps
- ski mag
- Necesity
- None of the above
- experience with the product
- online reviews at retailer websites
- Referral
- New schoolers
- Youtube
- Family
- rental experience
- Ski Shop Personnel
- Ski instructors
- Web Reviews
- Free Demos

Which list/alert/app do you find most influential?

- ski tracks
- Powderwhore
- Warren Miller
- telemarktips.com
- none
- steepandcheap.com
- the one I opt in to
- too many
- Facebook
- e-mail updates; newsletters; alerts directly from the individual mountain resorts (e.g. Schweitzer in Idaho is great)
- Ski Report (app)
- Twitter
- Weather
- clymb
- skihood
- Liftopia email alerts
- ski.com
- REI
- skiing
- SNow report
- Ski Reports
- REI
- n/a
- NA
- tramdock
- REI SNOW REPORT
- Meadows Ski report
- Ski report app
- Info coming to email
- timberlinenewsletter,meadows newsletter, skibowlnewletter
- Snowalert email
- email
- Timberline emails
- steepandcheap.com
- Mount Hood Meadows
- Meadows snow report
- snow-report.com
- ski report
- Retailer mail lists
- Free skier mag
- Steep and Cheap
- theclymb.com
- The Clymb
- snow-forecast.com
- snow report
- Meadows, liftopia
- Ski report all
- epic

- Oregon ski
- e-mail
- steep and cheep
- snow conditions
- Ski Magazine
- Skiing
- whiskeymilitia.com
- Liftopia
- On line reviews
- vendor websites
- Snow Report
- REI App
- skitiger
- none
- REI snow report
- weather alert, noaa
- ski report
- Next Adventure
- HOODOO
- EVO1
- NOAA web site, local telemetry, ski area web sites. Most are quite poor and not optimized for iOS. Meadows Tweets are great, but Timberline's are very poor.
- Twitter
- The Clymb
- N/A
- Skimag
- Psia
- Mt Hood Meadows email newsletter
- theclymb.com
- pop up
- @MtBachelor Twitter / SkiReport app
- The house
- powder
- REI
- Hoodoo emails
- Email
- Hoodoo, Bachelor
- Snow report
- none
- emails
- email direct from vendor/Mtn.
- Facebook
- I think I only get one from Hoodoo.
- Sales
- TransWorld
- na
- facebook updates about conditions
- Hoodoo mailing list
- cleansnipe.com
- Hoodoo
- "Ski Report" app on my ipod
- ski magazine
- I don't know
- NONE
- NA
- Ski Report
- rei
- ski area sent alerts
- Backcountry.com blog
- Ski tracks
- reigearmail
- Mounthood Meadows alerts
- Hoodoo email list
- Steep & Cheap
- On the snow
- Timberline newsletter
- Lift Ticket
- Twitter
- sierratradingpost
- REI
- Hood River Meadows email newsletter
- Email
- resortfacebook posting
- Evo's deal alert emails
- Facebook
- ski report
- ski fever
- ski report
- snow conditions
- Snow reports
- snowboarding magazine
- ski center alerts
- quality website
- email
- Backcountry, earn your turns, telemarkskier ,facebook
- weather.com
- facebook updates
- Mthood meadows
- email
- REI
- REI

- marmot.com
- Hoodoo stuff
- email
- Twitter
- Hoodoo's email alert
- ski report
- email
- email
- Fasterskier, SkiTrax and other industry faceBook sites
- rei
- Power Tracker
- hoodoo
- tv
- SnowReport
- REI
- columbia
- Hoodoo and Mt. Bachelor Facebook pages
- Snow report
- play it again sports
- Individual stores emails such as rei, skjersaa's
- Snow report
- ski area updates
- facebook notifications
- Steep and Cheap, Telemarker
- Sno-Forecast
- My iphone has just died so I cannot look to see the name, sorry
- Columbia Sportsware Ads
- you tube
- N/A
- REI
- media
- WEATHER
- The Meadows Website
- deal alerts
- Meadows snow report/blog
- ccs
- Ski Tiger
- Mt hood meadows email
- None
- ski militia
- Snowboard magazine app
- REImail
- twitter1
- Skibowl's email list; Twitter
- Ski swap
- ski report
- newspaper and radio
- Meadows email
- powder alerts
- the snow report, itravelmap
- Timberline Lodge alerts
- email
- Hoodoo
- snow level on mountain
- REI
- On the Snow
- Dogfunk
- ski magazine
- wildsnow.com
- skis.com, levelnine
- Timberline e mail
- None
- Ski Magazine, Ski areas' email lists, Ski Shop email lists (such as the Mountain Shop, Next Adventure,...)
- ?
- Next Adventure
- Warren Miller Enterprises
- Timberline newsletter
- 0
- n/a
- Sale alerts
- The North face snow report
- 4
- Meadows daily snow report
- rei emails
- e mail
- Mtn. High Snowsport club emails
- nw boarders
- ski area alerts
- level nine sports
- weather
- PSIA Website and snow sport Instructor
- the Meadows and Timberline e-newsletters
- noaa
- end of season sales alerts
- Email
- Powder.com
- weather app

- Ski Oregon
- FAcebook
- Snotel
- Colorado Ski Country USA
- clock on my iphone?
- North side ski app
- Berg's
- The Northface Snow Report
- iski
- Timberline Newsletter
- ski reports
- the mountain conditions
- National Ski Patrol
- Mt. Bachelor Conditions
- Ski report app
- Facebook
- Gearscan.com
- Wildsnow.com
- DEAL ALERT EMAIL
- Mt Bachelor e-mail
- Mt Bachelor reports
- none
- emails from mt bachelor
- evo.com buyer reviews
- Backcountry, REI
- Tgr, evo
- twitter and facebook
- Mt Bachelor Email
- Facebook
- Mt Bachelor Emails
- na
- Snow Report
- Mt.Bachelor.com
- promotive. leftlane
- Facebook subscriptions
- The Clymb
- Ski Report
- on the snow
- sierra trading post alerts
- newschoolers
- Mt. Hood Meadows E-Newsletter
- THE NORTH FACE
- Ski Magazine
- Whiskey malitia
- Facebook
- Tramdock
- REI
- Mt Bachelor web &facebook
- Mt Bachelor report
- rei
- Email list.1
- Rei
- Various snow report apps.
- emails from REI
- facebook
- mt. bachelor alerts
- n/a
- REI
- freeskier
- evo.com
- Sliding on the cheap
- none
- snow report
- mtbatchelor
- email from REI or Hillcrest
- on the snow
- ski club newsletter
- BackCountry
- Ski Trax
- Mt Hood Ski Patrol
- none - weather
- Weather
- Ski Idaho
- email
- skioregon.org
- google searching
- email
- Mt. Hood Meadows weekly email
- n/a
- na

How do you get information on current snow/road conditions? (Other)

- trip check
- avalanche forecast
- iPad
- NWAC Telemetry
- NOAA
- app
- NOAA
- iphone app

- weather.com
- NOAA
- Website
- online
- Facebook
- friends living at ski hill
- Employees
- app
- AVID SKIERS
- Twitter
- Apps/Twitter
- app
- Trip check
- ktvz.com/weather
- Friends already there
- App
- apps
- Facebook
- Snowtels on web
- Northwest Area Avalance Control.
- NOAA
- Facebook
- internet
- iPhone app
- noaa
- Stick my head out the window and see
- ski report app
- app
- tripcheck
- iphone app
- weather app on smartphone
- Twitter
- family
- Social Media
- Facebook
- ski report app
- phone app
- twitter
- Department of Transportation website
- app
- Friends
- ski app for andriod
- Facebook
- NOAA
- online
- Ski Report app
- Facebook
- noaa
- Friends
- I really don't care
- Twitter
- phone apps
- computer
- ODOT web site
- Online forecasts
- tripcheck.org
- Snotel
- Phone app
- Online
- I phone
- On-LIne Trip Check
- Facebook
- facebook
- Facebook
- twitter
- skitiger.com
- NOAA
- Facebook
- IPhone App
- NOAA
- noaa
- IPhone apps
- NOAA
- NOAA radio
- Avalanche reports
- friend
- iPhone App
- None
- Facebook

What mode of transportation do you normally use to get to the mountain to go skiing/riding? (Select only one) (Other)

- Mini Van
- hitch hike
- TRUCK
- truck

- Suv
- 4X4 truck
- truck/toyota
- truck
- SUV
- greasebus
- truck 4x4
- suv
- truck
- airplane
- 4x4
- Truck
- truck
- airplane and car
- Fly
- truck

The following question is asking about your most recent ski vacation in Oregon. Was the primary purpose of the trip to participate in snowsports? If No, please indicate what the primary purpose of your trip was.

- vacation
- new years eve
- visit family
- vacation
- Thanksgiving family gathering
- Family
- visit family
- Fellowship with ladies from church and biking through trails in Sunriver
- visiting friends
- Family and ski
- Christmas celebration combined with skiing
- Visit family
- thanks giving. Mine was skiing
- Wedding
- Family vacation (and snowsports)
- Vacation

Please check the following activities you participated in while on your ski vacation. (Check all that apply) (Other)

- Skiing/Climbing Mt. Hood
- dogsled
- skiing
- fishing
- Downhill skiing
- hiking
- Dining out, but not $$$$
- TrikkeSkki
- skiing
- downhill skiing
- Bend Winter
- SKIBIKING!
- Biking & Hiking
- downhill skiing
- Play (Theatrical)
- visiting
- ski biking
- Brew Pub Dining
- Fireworks
- Dog Sledding
- snowboarding
- art gallery
- skiing/eating
- skiing

Do you plan to take future destination ski vacations in Oregon? If No, why not?

- live here
- Living here
- we own at collins lake
- I live 30 minutes from mt bachelor
- Everything is getting too expensive.

What could make Oregon a more attractive ski destination?

- Less rain, lighter snow
- For Willamette Pass, they could put in a snow board park.
- Better snow, better resort terrain, and more predictable weather patterns.
- Oregon has some great skiing but it takes a lot more commitment to get to the destinations and too often I find myself trying to figure out a plan C or D to deal with what wasn't advertised/forecasted.
- More lodging and night life available closer to the ski resorts
- Colder
- Rates for locals, more ski and stay packages, multi-area ski pass (beyond Fusion)
- I think Oregon would be a better ski destination if we could some how / some way connect the ski areas to the lodging entities and the lodging entities to the airports. If people could fly into Portland, Redmond, or Eugene, and get to their lodging ... ad then onto the mountains, more people might be interested in coming to our ski resorts for destination visits.
- More challenging terrain
- Better transportation to the ski slopes
- A Gondola or sky bus that connects Govy to skibowl to timberline to mt hood meadows and a pass that covers all 3
- Ski in/out villages where you can stay at the actual mountain (no driving necessary) and ski to your lodging and walk to the town (similar to Whistler or many places in Colorado).
- Better snow conditions. more coupons or promotions.
- More ski/lodging deals which include all ski resorts on Mt. Hood
- Updated newer resorts.
- AFFORDABLE LIFT TICKETS! Skiing used to be fun and affordable. Now it's out of control. I only ski when I find deals.
- Better deals on hotel and mt lift tickets. During my last stay at Seventh Mt. Resort in Bend it was $89 per person per day and it included a lift ticket to the mt. That was an unbeatable deal. The only reason I did not go back again this year was they o longer have that amazing deal. Skiing can be very expensive and to get the most people to go it has to be more economical.
- Less traffic on Hwy 26
- More public transportation
- good restaurants
- Fluffy snow
- Better weather and bigger ski areas with more challenging terrain. Good luck with that! Slopeside accomodations would help but we locals wouldn’t want to see it destroy the public land.
- Cheaper lift tickets, more night skiing, closer lodging
- Sunshine! ...and lighter snow
- lower cost of fuel and lifts
- sightseeing
- Better lodge at meadows.
- The only thing that would make it perfect is predictable weather with light powder snow--but that's not within our control.
- motels closer to mountain
- It's the best of the best coming from an Olympian!

- I love Oregon and am excited to check out ski destinations further afar. Next trip is Anthony Lakes.
- It would be great if the lodges that are at the resorts would accommodate the amount of people that are their on the weekends and holidays. It is way too crowded and difficult finding places to sit. Maybe having more lodging options near Mt. Hood Meadows that are affordable. Keep up the packages for children and adults skiing. It is very costly, but when the resorts have deals it makes it more attractive to go.
- Cheaper lodging, more proffesional customer service, larger lodges
- It is already a great place to ski. Mt Bachelor has wonderful long, wide groomed runs. (The weather was great and the visibility also.) I would like it if Mt Hood Meadows would have more and wider groomed runs especially on weekdays.
- Better conditions for longer (I know there's not much we can do about that)
- Better climate
- affordable lodging for family closer to the ski resorts.
- Longer runs on the mountains. Better accommodation facilities -- especially in the Mt. Hood area -- closer to the mountain. More places to stay over in Govt. Camp and an overnight place at Meadows.
- Better traffic/roads.
- Cheaper Senior rates
- Better highways to the resorts. (more highway), Better food at the mountain, less expensive, More parking and buses to the resort doors. I don't think you can do much about Mother Nature
- Resorts on the mountain! Timberline is the only opportunity Oregonians have to be able to ski in and ski out. If there were lodging at other Oregon destinations many riders would simply stay on the mountain rather than add to the congestion traveling on and off every day!
- Lower lift ticket and ski lesson prices.
- ski in ski out lodging
- Groom more black diamonds at Mt Ashland.
- Greater availability of ski lift deals, e.g. buy 5 passes and use them any time during the season.
- Provide better food at lower cost on the mountain. Tired of paying $10.00 for a burger you could buy at Macdonalds for $2.50.
- i love it here! This is my home!
- More Package deals
- We ski Timberline during summer holidays, so deals on multi-day lift tickets would be great! Also ski hills here in British Columbia have recipricol passholder deals and passholders at Big White Ski Resort here in British Columbia (our home resort) have agreements with several resorts in Washington state giving passholders a 25% off deal on lift tickets. We love Timberline, and would ski there anyways, but a discounted lift ticket is always appreciated!!!!!!!!!
- better snow conditions, MORE POWDER!!! BETTER GROOMING
- DECREASE lift ticket price!!!!!
- Colder temperatures
- More on the mountain accommodations similar to Timberline Lodge
- Better parking in Government Camp. Get the gondola to Ski Bowl and Timberline built. I avoid Meadows because of the parking and all the accidents on Hwy 35. Too much hassle at Meadows if you don't arrive by 8:30am. Create a DECENT iOS app that include push notifications for traffic incidents, weather, web cams, accurate weather reports, etc. Meadows' Tweets are great, but the other on Mt. Hood are lacking.
- Cheaper fuel prices and cheaper lift ticket prices

- Family packages of ski lift tickets, kid's lessons & food/drink
- ski in lodging!
- Nothing, I feel it is the best.
- Smaller crowds on holidays. More brewpubs. Good workout facilities & other athletic options in case the weather's bad.
- I love Oregon!
- closer lodging to the slopes
- More resorts and more lodging at more ski places.
- More "cross passes" between areas. Mt. Hood areas have "fusion" etc. -- it'd be great to have a state-wide option!
- Better lift ticket pricing.
- More Sunshine
- Better powder.
- If Mt Bachelor executives kept the customers' needs or wants in mind when making an operational decision. Have none of them actually been customers at other ski areas any time in their lives???
- Oregon-local discounts via packages that range from day trips to weekend and week-long trips (i.e. food discounts when purchase day pass, lodging discounts when purchasing more than one day pass, etc.)
- Discounts for being an Oregon state pass holder at mountains other than my usual one. Thinking of spending more money to ski, when we own passes, restricts us from traveling to other mountains as much as we like to.
- Mt. Bachelor being managed better. The quantity of disgruntled locals is the worst 've seen it, and I've been a pass holder for a decade. It makes us more eager to ski Willamette and HooDoo since we won't be getting Bachelor passes next year.
- Better snow and weather
- Better terrain at small resorts
- Public transportation
- more snow, lower prices, cheaper gas, tubing parks at all locations
- Kids ski free to say age 10 or 12. We've cut our ski days in half since Hoodoo lowered it's age for cheeper/free kids tickets. We ski out of state and kids still ski free. Since we pay for both kids to ski now we have stopped eating at the lodge and ski lessons.
- Cheaper lift tickets for Oregon residents.
- All inclusive lodging/lift packages
- high speed lifts at SkiBowl,
  more frequent shuttle service between Govy and Timberline
- Cheaper!
- ski in out lodging
- More snow?
- Nothing...it is wonderful.
- Better advertising of the smaller areas, like Anthony Lakes, or Willamette Pass and the like.
- Great terrain but almost no knows about them unless you are here already.
- Closer lodging to destination (i.e. Hoodoo and Willamette Pass)
- lodging closer to the resort
- Less expensive place to lodge.
- More package deals
- Cheaper lift tickets

- Lift tickets need to be more affordable for the average college student. Ticket prices are becoming unreasonable.
- More resorts allowing skibikes, Mt. Hood resorts allowing skibikes though I do a lot of backcountry riding on Hood
- Fine dining, good shopping, and sweet brew pubs.
- more lifts
- better lodging
- I am not sure there is anything.
- better deals
- Hard to say. Possibly bigger entertainment and events at the mountains.
- It is home and probably the only place that I am likely to go to ski for now.
- More resorts on hood
- better weather for powder show
- better food. longer season
- Slopeside lodging
- I don't think there is any way Oregon could be a more attractive ski destination!
- Less expensive lift tickets. Drier conditions
- Mt Bachelor needs a consistent rate - the color system is nuts and frustrating when it drops during a bad day when you already paid full price.
- Ski Bowl could really use a triple chair so one parent with two kids can safely handle them on the lifts.
- I've loved the night and spring pass deals for local mountains. A Fusion Night pass to timberline and SkiBowl would ROCK! A BOGO once in a while for Mt. Bachelor would make me come frequently. They didn't even participate in Shell this year - with two kids I can only afford to ski one day a week so the ski free deal disappointed me.
- Cheaper lift tickets
- Nothing, I enjoyed everyday at the lodge and in the city of Ashland. Everything was more than our expectations and everyone especially on the mountain were very polite and helpful
- Drier snow, more up-scale lodging options near the slopes
- Faster chair lifts. Better plowed roads
- More ski resorts with a hotel next to the ski runs
- Volcanic eruption creating a new ski area with 4,000' vertical. OR has great ski options, but for the big stuff one has to travel out of state. Also some areas, such as UT or CO, work better when meeting family or friends who are located around the country. SLC is probably the best for flying in and having numerous ski options.
- Cheaper lift access..... More days cheaper lift rates
- Better lift ticket deals/kids ski free passes on Mt. Hood.
- easier access to mt hood from Portland
- I can find fault with any of the places I've been in Oregon. Each is different, which is nice. Perhaps if you emphasized spring skiing more. My wife and I have not had good experiences on the mountain with either snow conditions or weather during the winter. Our best times have been during the Spring the past few years
- More parks and bigger terrain parks
- Ski-in / ski-out lodging, ... or at least lodging within walking distance of the lifts. Ski areas in British Columbia have it right. See Apex, Silver Star, Big White, Sun Peaks, Panorama, Kimberley, Kicking Horse, Revelstoke, etc. Many of them even have$20 per bed hostel lodging that is almost ski-in/ski-out.

- Better transportation from Portland metro area to Mt. Hood and Bachelor
- Nothing. It is already an attractive destination.
- Environmental sustainability efforts
- Better weather.
- steep and deep, good food and good beer and free for kids
- Better snow
- Better transportation from off mountain lodging to the mountain. Buses from Bend are often over crowded and no longer stop at some of the lodging.
- cheaper lift tickets for Oregon residents
  more events for cheaper ski tickets (rotary ski day, Make a hero, Mt b's $25 charity tix, Warren Miller deals)
- better snow conditions
- Better Package deals including lifts and lodging.
- On slope lodging
- Perhaps, better advertisement in national media. Oregon skiing is under-advertised as compared to some other West coast resorts. Even my friends in Seattle have no clue about skiing in Oregon.
- Lodging at the ski resorts
- lift ticket prices are outrageous for the quality of mtn/snow/terrain we have in Oregon. compared to nearby location.
- Online deals, discounts, or coupons
- Not much -it's just a long drive for us!
- We love visiting central Oregon in all seasons. The only thing that would make it more attractive is beyond our control: good weather on the mountain! We appreciate all the skiing specials offered by Mt Bachelor, like the spring specials and online discounts for pre-purchasing lift tickets.
- Better cell phone service, especially with AT &T
- Better weather during Christmas break :)
- Sitting area with a fireplace,
- Nothing its amazing
- More advertisement for resorts in travel guides, it just needs to be more known outside of Oregon that we have some potentially awesome ski days at great resorts
- Dining options that are good, not too spendy
- MORE SPECIAL OFFER'S OR FAMILY DISCOUNTS.
- Cheaper lift tickets and food
- More customer friendly operations of resort.
- Better services.
- Better lift operations.
- Improved lifts.
- Closer lodging to mt bachelor
- Move it closer to Washington :)
- Better lift ticket deals -- e.g. discount ticket packs good for any person any day of the season. I would buy 5-10 days for Ski Bowl and 10 - 20 days for Bachelor in addition to my Willamette Pass season pass.
- Deals on lift tickets and lodging.

- Oregon is already a great ski destination for all who choose to come here. We have what folks need. The snow comes as it will and the weather causes it to be wet or dry. We are not in control. Just come and enjoy. :)
- lodging at the resort, more terrain available (Bachelor--if they ran all their chairs on a more regular basis)
- nothing- everything is perfect!
- Easier to get to
- Fluffier snow conditions!
- More events at the resorts
- Fewer tourists. I don't want more people, more traffic and longer lines, thank you.
- Bachelor could open the carpet up to general public so I could take my 2 year old skiing there. Otherwise I think snow conditions are a huge thing that is sort of unpredictable. We like Sunriver because it is a good long weekend trip and is really family friendly. We do have a budget and aren't looking for frills so any place that is nice and caters well to families with small children is good for us.
- Update day lodges, more ski terrain, longer ski runs