

Ski Areas of New York Economic Impact Analysis



2022/23 Season



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Introduction

This report summarizes the findings of an economic impact analysis of downhill skiing and snowboarding in New York State, inclusive of summer activities and capital expenditures at these ski areas. Ski Areas of New York (SANY), the trade group for ski areas in the state, commissioned the study, which was conducted by RRC Associates of Boulder, Colorado. RRC is a leading consulting and market research firm in the snowsports industry and tracks many statistics for the industry throughout North America. Working on behalf of the National Ski Areas Association (NSAA), RRC produces the annual Kottke End of Season and Demographic Report and the Economic Analysis of US Ski Areas, two foundational industry reports that track patterns of significance to the ski resort industry related to operational & demographic and financial information, respectively.

New York has the largest number of operating ski areas of any state in the US (52) and is typically fifth in terms of total downhill snowsports visits, averaging 3.6 million downhill skier/snowboarder visits per season over the past five winters (where 1 visit=1 skier visiting for all or any part of a day). Visitor surveys and operator estimates indicate that approximately two-thirds of these visits are attributable to New York state residents. Thus, the ski resort industry is very important to the state, particularly during the time of year when such businesses primarily operate (December through March). Additionally, the location of New York ski areas is widely distributed throughout the state (as opposed to being concentrated in a certain geographic area of the state). There is a ski area within 90 minutes of nearly every major New York metro area; this distribution makes skiing and snowboarding an important contributor to employment and quality of life for residents all across New York state. Quantifying the economic value of the industry, as presented in this report, is necessary to more fully understand its significance.

Executive Summary

Economic impact is defined as the total value to the economy due to the existence of downhill ski and snowboard areas (hereafter referred to “ski areas”). The total value is the amount that such ski areas contribute to the New York state economy, and the amount by which the economy would suffer without those ski area facilities, assuming that visitors would go to other states if skiing opportunities weren’t available in New York.

Economic measures evaluated in this report include economic output¹, employment², and labor income³. Both direct⁴ and secondary⁵ economic impacts are evaluated.

Highlights from this report include the following:

Table 1
Total Impact (Direct and Secondary) 2022/23

Economic Measure	Economic Output (\$MM)	Employment	Labor Income (\$MM)
Total direct economic impact	\$717	9,849	\$261
Total secondary (indirect and induced) economic impact	\$604	3,268	\$167
Total economic impact (direct plus secondary)	\$1,322	13,117	\$428

- Economic Output. The ***total economic output of the ski resort industry in the State of New York was \$1.322 billion*** for the 12-month period covering the 2022/23 ski year.
- Employment. In terms of employment generated in the ski resort industry, the estimate is that these businesses directly employ approximately 9,849 people total, in both winter and summer. Additionally, 3,268 other jobs can be attributed to the ski resort industry via secondary effects. ***Thus, the total employment that is attributable to the ski resort industry in New York State, both direct and secondary, is 13,117 year-round equivalent jobs.***

¹ Economic output is the value of industry production and is equivalent to business revenues (sales), except in the case of retail sales, where output equals sales minus the cost of goods.

² Employment reflects year-round equivalent jobs. A year-round full time job and year-round part-time job are each counted as one job. A 6-month seasonal job counts as 0.5 job.

³ Labor income includes employee compensation (wages, salaries, benefits, and payroll taxes) and proprietor income.

⁴ Direct impacts include initial, first-order economic impacts generated by the direct expenditures of skiers (as well as capital expenditures by ski areas).

⁵ Secondary impacts reflect the multiplier effects that ripple through the economy as a result of the direct impacts, and include indirect impacts (business-to-business purchases in the supply chain) and induced impacts (household spending).

- Labor Income. The ski industry generates **total labor income of \$428 million**, which is an estimate of the wages, salaries, benefits and proprietor income paid as a result of the ski industry, whether to people employed directly by ski resorts, or by secondary/related jobs.
- Direct Spending. Total direct winter visitor spending is \$512 million, while total direct summer visitor spending is estimated at \$56 million. In sum, the total **direct annual visitor spending is \$567 million**. Of this total, approximately 62 percent goes directly to ski resort businesses, and **38 percent goes to other related businesses in the area**.
- Total Skier Visits. **Ski areas in New York State hosted 3,731,207 skier visits in the 2022/23 season**, up 1.4 percent from the 2021/22 season.
- Snowsports Retail Expenditures. An additional component of the economic benefit of skiing and snowboarding in New York State is retail expenditures made specifically for the sports – equipment, apparel, and accessories. The direct expenditures in this retail segment are estimated at **\$231 million** (excluding purchases made at ski area-owned shops, which is already included in the direct spending above).
- Capital investment. Ski areas in New York are continually investing in improvements to their properties, which enhance the guest experience and provide jobs and wages. These improvements have an important value to the economy that would otherwise not exist, often employing contractors and other businesses to do the work. The **capital investment for New York ski areas for the 2022/23 fiscal year was an estimated \$112.9 million**.
- Additional Benefits. Several additional benefits are attributable to the presence of ski area in New York State, but are difficult to quantify. These include quality of life impacts, business attraction and retention, charitable donations, health and wellness impacts, events and exposure, and the 3rd and 4th Grade Passport program.
- First Time Skiers and Snowboarders. In the 2022/23 season, it is estimated that **160,000 people learned to ski and snowboard** at ski areas in New York State in the 2022/23 season.

The economic impact figures above quantify only the most measurable impacts, and do not include social, environmental, or cultural impacts, which can be significant but are more

difficult to quantify and have thus been excluded from this analysis. See the section titled “Other Economic Benefits” for a discussion of some of these additional quantitative and qualitative effects.

Methodology

The analysis looks at three sources of economic impact:

1. Trip-related visitor spending, associated with downhill ski/snowboard trips in winter and summer visits to ski resorts.
2. Additional consumer purchases of ski equipment, apparel and accessories in New York state which are not associated with a ski trip.
3. Capital expenditures made by ski resorts.

Major sources of information for this analysis included the following:

- A survey of New York ski area operators, which asked for information on winter visits, summer visits, revenues, employment, wages and benefits, and capital investment, among other data points.
- Ski area visitor surveys (collected through the NSAA Demographic Study research programs), and other NSAA national and regional ski resort industry data.
- Ski equipment, apparel and accessory sales data collected by Circana and reported at the Outdoor Retailer expo.

As described in more detail in the body of the report, economic impact models were developed for each of the three sources of economic impact listed above, using the information sources described above. Industry norms and statistics were used to develop reasonable assumptions when direct data was not available. Estimates of direct and secondary effects on output, employment and labor income were developed using US Bureau of Economic Analysis RIMS II multipliers for New York State.⁷

The number of operating ski areas in New York State is generally about 50 to 54, depending on the season. The table below lists a total of 52 areas that were open and operating during the

⁷ The RIMS II multipliers were based on 2012 U.S. Benchmark Input-Output data and 2021 Regional Data. The RIMS II employment multipliers (i.e. employment per \$1 million in output) were inflation-adjusted from 2021 to January 2023 based on the Northeast US Consumer Price Index (from US Bureau of Labor Statistics).

2022/23 winter season, inclusive of some very small areas that provide free skiing and snowboarding.

Table 2
Operating Ski Areas in New York State, 2022/23 (52)

Beartown Ski Area	Four Seasons Ski Center	Mount Pisgah	Ski Venture
Belleayre Mountain	Goodnow	Mt. Peter Ski Area	Snow Ridge Ski Area
Brantling Ski Slopes	Gore Mountain Ski Area	Northampton Park	Song Mountain Ski Area
Bristol Mountain Ski Resort	Greek Peak Ski Resort	Oak Mountain	Swain Resort
Buffalo Ski Club	Holiday Mountain Ski Area	Peek 'n Peak Resort	Thunder Ridge Ski Area
Camillus	Holiday Valley Resort	Polar Peak	Titus Mountain
Catamount Ski Area	Holimont	Powder Mills	Victor Constant Ski Area
Cazenovia Ski Club	Hunt Hollow Ski Area	Ridin Hy Ranch	Villa Roma
Cockaigne	Hunter Mountain	Rocking Horse Ranch Resort	West Mountain
Double H Ranch	Kissing Bridge Corporation	Royal Mountain Ski Area	Whiteface Mountain
Dry Hill Ski Area	Labrador Mountain	Schroon Lake	Willard Mountain
Dynamite Hill	Maple Ski Ridge	Skaneateles Ski Center	Windham Mountain Resort
Emery Park	McCauley Mtn. Ski Center	Ski Plattekill	Woods Valley Ski Area

This report focuses on the economic value of the downhill snowsports resort industry to New York State. While some economic impact studies focus on incremental spending from out-of-region visitors only, this analysis instead highlights the value that the industry produces given its current configuration, inclusive of residents and visitors alike. Skiing is an activity that participants would likely do elsewhere if no facilities existed in New York State. In other words, many resident skiers and snowboarders would likely would not give up their sport but would instead travel elsewhere to participate. As such, this study is not limited to visitors to New York State, but is inclusive of all skiers and snowboarders who participate at facilities within the state's boundaries.

For conservatism and consistency with past SANY economic impact studies, the analysis excludes economic impacts associated with Olympic Regional Development Authority (ORDA) facilities that are not directly associated with downhill skiing. These exclusions are the Olympic Training Center, Olympic Center, Mt Van Hoevenberg, Veteran's Memorial Highway, and Olympic Jumping Complex.⁸ (The analysis does include impacts associated with ORDA's Gore Mountain, Belleayre Mountain, and Whiteface Mountain ski areas.)

⁸ These excluded ORDA facilities had significant economic impacts, which are summarized here for readers who may wish to understand or include them. These excluded ORDA facilities welcomed 225,066 visitors and

National Ski and Snowboard Resort Industry

Highlights

This section provides an overview of the 2022/23 ski season, based on results reported in the Kottke End of Season and Demographic Report, prepared by RRC Associates and published by the National Ski Areas Association (NSAA). The study tracks several key operational barometers of interest and importance within the ski industry.

New York State is categorized in the Northeast Region for NSAA statistics; as such, highlights from the Northeast region are often highlighted in the narrative below.

- ***US ski resorts had an historic, breakout season in 2022/23, soaring to 65.4 million visits and leaping past the previous record of 60.7 million visits set in winter 2021/22.***
- ***The western half of the country was extremely strong; the eastern half was mixed.*** The Rocky Mountain region surged to its second consecutive record with 28.2 million visits, up 11.6% YOY. The Rockies accounted for 43.1% of total national visits, its highest level on record (based on data going back to 1978/79). The Pacific Northwest also set a record of 4.6 million visits, up 11.9% YOY, while the Pacific Southwest had its second-best season on record, up 15.1% YOY. The Rockies and Pacific Southwest especially had excellent snow conditions and in some cases record snowfall.
 - Despite often-challenging weather, **the Northeast also had a good season**, up 4.5% YOY, and recording its 16th best season in 45 years, aided by solid snowfall and better operating conditions than the previous two seasons. With 13.2 million downhill skier/snowboarder visits in 2022/23, the Northeast region was up 8.4% from its 10-season (2013/14-2022/23) average of 12.2 million. Northeastern resorts received an average of 123 inches of snowfall, down slightly the 10-season average of 127 inches.

competitors in FY 2022/23, who spent an estimated \$36.4 million (calculated from spending factors contained in ORDA's 2022/23 Economic Impact Study, accessed at <https://orda.org/media/corporate-reports/>). Additionally, \$34.2 million in capital expenditures were made at these facilities in FY 2022/23. After factoring in multiplier effects, the aggregate economic output attributable to visitation and capex at these excluded ORDA facilities was likely approximately \$123 million, with substantial job and income impacts too. Again, however, these impacts have been excluded from the figures contained in this report for conservatism, although they are "skiing-adjacent".

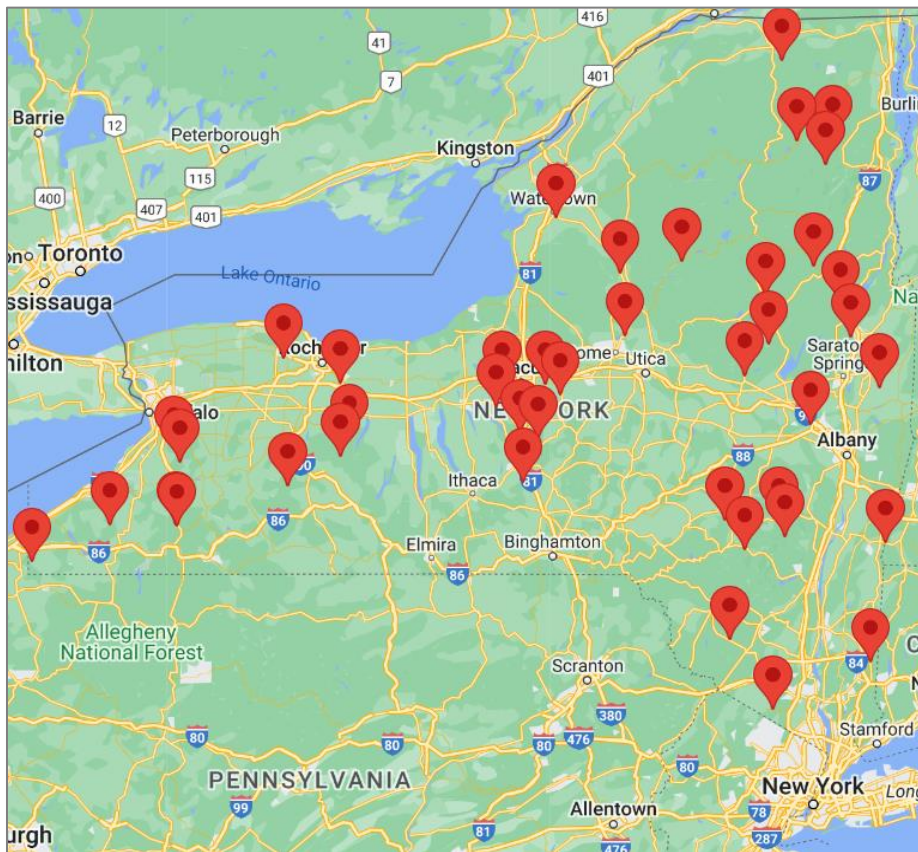
- The Southeast (-2.7% YOY) and Midwest (-4.3% YOY) had below-average seasons, ranking as 33rd and 35th busiest respectively in 45 years, with the Southeast experiencing well-below-average snowfall.
- **Larger ski areas performed well.** Total skier visits at large and extra-large areas (based on lift capacity, measured in vertical transportation feet per hour) were up by 13.2% and 11.3%, respectively, to a combined total of 48.6 million visits nationally. Skier visits were up marginally at medium areas, while among small areas, skier visits declined 5.7%.
- **Continued high share of visits on non-holiday weekdays post-Covid.** The share of visits occurring on non-holiday weekdays nationally has been 46-48% in 2020/21 – 2022/23, up from 40-42% in the 2013/14 – 2018/19 seasons. The persistence of strong midweek visitation since the pandemic suggests the possibility of an enduring shift in customer behavior, likely aided by more remote work and possibly more flexible working arrangements. Also likely contributing to the trend is increased visitation by skiers of retirement age, as well as an increased share of destination visitors at Rockies resorts (whose trips often encompass midweek days).
 - **The Northeast has experienced similar patterns**, with the share of visits occurring on non-holiday weekdays jumping to 40-42% in 2020/21 – 2022/23 from 32-35% in the 2013/14 – 2018/19 seasons.
- **Continued (but slowing) increases in the share of visits from season passes.** The share of skier visits attributable to season passes nationally increased to 50%, up from 49% in 2021/22 and 38% in 2013/14. Trends in season pass unit sales (up 9.5% this season) and average visits per passholder (down 0.4 days this season) show that this trend has been driven by higher numbers of individual passholders, rather than existing passholders skiing more frequently. The growth of pass visits has slowed in recent seasons as frequency products have emerged as an increasingly popular option. Separately, visits on paid single-day and multi-day tickets have decreased significantly over the past five seasons.
 - **The Northeast has experienced similar patterns**, with the share of skier visits on season passes climbing from 37% in 2013/14 to 47-49% the past three seasons. The share of visits on frequency products has also trended up, reaching 8% in 2022/23. Conversely, the share of visits on daily or multi-day tickets has trended down from 56% to 38% over the past ten seasons, while the share of visits on non-paid tickets (e.g. employee passes and complimentary tickets) has held steady at about 7%.

- **Record capital investment.** In 2021/22, ski areas indicated that their planned capital expenditures for this winter were at an all-time high. In 2022/23, areas followed through with these projections and total capital expenditures indeed hit a record of \$818 million, more than double the prior winter's spending. The industry invested in many improvements designed to accommodate a higher volume of business and improve the customer experience, including \$238 million spent on 149 new and upgraded lifts. In the 2022/23 season, the average ski area invested over \$25 per skier visit to improve the guest experience.
 - **Strong capex at Northeast resorts.** Northeast resorts responding to the NSAA Kottke survey spent \$153.6 million on capital improvements in 2022/23, the highest in at least 10 seasons. On average, responding Northeast resorts spent \$20.15 per skier visit on capital improvements in 2022/23.
- **Improvement in staffing levels.** Nationally, 41% of responding ski areas were fully staffed this winter, a large improvement over last winter's 19% share of fully staffed areas. And while over half of ski areas still found themselves short-staffed this winter, these areas reported an average staffing level of 90%, meaning the shortages were less severe. The average number of employees short at understaffed ski areas was 39 employees (down from 72 last winter).

New York State Ski and Snowboard Resort Industry

The large number of operating ski areas in New York State (52) provide a wide variety of opportunities for snowsports enthusiasts, from the steep slopes of some of the larger mountains to the small, intimate family feel of the smaller hills. The breadth of offerings provides many options for skiers and snowboarders. As seen in the map below, the location of ski areas in New York is very broadly distributed throughout the state (as opposed to being concentrated in a certain geographic sector of the state). There is a ski resort within 90 minutes of nearly every major New York metro area; this distribution makes skiing and snowboarding an important contributor to employment and quality of life for residents throughout New York.

Figure 1
Map of Ski Areas of New York



Source: Ski Areas of New York.

Awards and Recognition

Some of the state's ski areas are well known throughout the region and have received awards from New York State, National Ski Areas Association, SKI Magazine, Ski Area Management Magazine, Powder Magazine, Liftopia, and other industry publications, as detailed below (list is not exhaustive).

SKI Magazine Winter Resort Guide 2024 – East

- Gore Mountain ranks 8th in the East
- Holiday Valley ranks 12th in the East

The Best Ski Resorts in the US and Canada: 2023 Readers' Choice Awards, Conde Nast Traveler

- Whiteface-Lake Placid ranks 36th in North America

Liftopia Best in Snow Awards – North America, 2019

- Overall: Titus Mountain (#2)
- Beginner Friendly: Titus Mountain (#1), Belleayre (#6)
- Family Friendly: Titus Mountain (#2)
- Least Crowded: Snow Ridge (#2)

Liftopia Best in Snow Awards – Northeast, 2019

- Overall: Titus Mountain, NY (#2), Whiteface-Lake Placid (#7)
- Beginner Friendly: Titus Mountain (#1), Belleayre (#4)
- Family Friendly: Titus Mountain (#2), Oak Mountain (#5)
- Most Challenging: Titus Mountain (#2), Whiteface-Lake Placid (#4)
- Least Crowded: Snow Ridge (#1), Titus Mountain (#3), Plattekill Mountain (#7), Oak Mountain (#8), McCauley Mountain (#10)
- Best Value: Titus Mountain (#2), McCauley Mountain (#5), Oak Mountain (#7), Whiteface-Lake Placid (#8)

NSAA Marketing Awards

- Best Overall Campaign (under 500K visits) – Windham Mountain (2023)
- Best Direct Marketing Program – Bristol Mountain Resort (2016)
- Best Social Media Campaign – Peek 'n Peak Resort (2015)

NSAA Safety Awards

- Best Overall Safety Program, Gore Mountain (2022)
- Safety Champion – Mark Roberts, Health and Safety Supervisor, Gore Mountain (2022)
- Safety Champion – Bob Piede, Safety Office Manager, Holiday Valley (2022)
- Best Guest Safety Award, Gore Mountain (2018)

NSAA Environmental Awards

- Sustainable Slopes Endorser Badge – Gore Mountain (2020)
- Golden Eagle Environmental Award for Overall Excellence – Gore Mountain (2016), Greek Peak (2013)
- Silver Eagle Award – Excellence in Fish and Wildlife Habitat Protection – Whiteface (2002)
- Silver Eagle Award – Excellence in Visual Impact – Gore Mountain (2006)
- Silver Eagle Award – Excellence in Environmental Education – Gore Mountain (2005)
- Silver Eagle Award – Excellence in Stakeholder Relations – Gore Mountain (2000)
- Silver Eagle Award Finalist – Excellence in Waste Reduction and Recycling – Gore Mountain
- (Note: Silver Eagle Awards were replaced in 2011 with three Golden Eagle awards for resorts in the small, medium and large sized categories)

NSAA Sustainable Slopes Grants

- Greek Peak was one of five ski areas awarded a sustainable slopes grant in 2013. Greek Peaks grant was used for five high-efficiency snowmaking guns.
- Oak Mountain was awarded a similar grant in 2011.

NSAA Best Overall Guest Service Program

- Up to 100,000 visits: Thunder Ridge Ski Area, NY (2009/10). NSAA presents this award to recognize positive development in customer service.

NSAA Lifetime Achievement Awards

- Paul Augustine, Titus Mountain, NY (2008)
- Orville & Israel Slutzky, Hunter Mountain, NY (2007)

Ski Area Management Magazine - SAMMY Leadership Awards

- Jon Shaefer, Owner, Catamount Ski Area, NY and Berkshire East M Resort, MA (2021)

- Laura and Matt O’Brien, Owners, Oak Mountain, NY (2014)

Ski Area Management Magazine and HKD Snowmakers – I AM a Snowmaker video competition

- 2024 winner – Greek Peak
- 2023 winner – Belleayre
- 2019/20 winner – Bristol Mountain

New York State Energy Research and Development Authority (NYSERDA) Grant Program (2018)

- Number of Ski Areas participating 31
- Total Funding \$5,000,000
- Number of new guns funded: 1,200 1,050 AW and 150 Fan Snowguns. Average cost per unit: \$4,166
- New snow guns saved New York Ski Resorts on average 13,000 kWh and 110 gallons of diesel fuel.
- Total savings: 15,600,000 kWh and 132,000 gallons of diesel fuel

2013 Tourism Excellence Award for Tourism Promotion – Ski Areas of New York (SANY), Olympic Regional Development Authority (ORDA), and Empire State Development Division of Tourism - co-recipients at the 7th Annual I LOVE NEW YORK Empire State Tourism Conference on May 2, 2013

OTHER AWARDS & RECOGNITION:

Dry Hill Ski Area

- Finalist, 2023 Watertown Chamber of Commerce Business of the Year Legacy Award (for businesses that have been in operation for over 20 years; voting taking place in January 2024)

Gore Mountain

- Gore Mountain is ranked in Ski Magazine’s Best in the East 2024 Resort Guide:
 - 5th for Lift Systems
 - 6th for Terrain Variety
 - 7th for Snow

- 7th Overall Satisfaction
- 8th for Guest Services
- 8th Family Friendliness
- 9th for Quick Trips
- 10th for Grooming
- Environmental Excellence Award, New York State Department of Environmental Conservation, 2018
- Adirondack Life Magazine's Best of the Adirondacks 2018 & 2016, Ski Center Winner
- Family Fun Magazine 2017 Travel Awards Winner, Best For Ski Bums
- Capital Region "Bestie" Award, Best Ski Area
- Adirondack.net 2019 Best Of The Adirondacks Winner: Best Downhill Skiing
- The Best Under The Radar Ski Resorts, Unofficial Networks, May 28, 2019
- Ski Magazine Resorts of the Year 2019- New York Resorts: Gore Mountain

Greek Peak Mountain Resort

- Syracuse.com/Post Standard's CNY 2023 Readers' Choice Award for Skiing – Winner.
- Finger Lakes Favorites magazine (Cayuga Radio Group): Favorite destination for Extreme Outdoor Adventure - The Adventure Center at Greek Peak Mountain Resort

Holiday Valley

- The Tamarack Club at Holiday Valley, the resort's premier lodging facility, was recognized by RCI with a 2023 Resort Recognition Program Gold Crown. Tamarack has received RCI Gold Crown recognition since its inception, now spanning 15 consecutive years (2009-2023). Select RCI® affiliated resorts are recognized as RCI Gold Crown Resort properties – the highest of the three RCI Award Designations. The RCI Gold Crown Resort award designates resorts that have met or exceeded specific standards in the areas of unit housekeeping, unit maintenance, hospitality and check-in/check-out procedures, and an evaluation of resort facilities, amenities and services.
- Buffalo's Best Ski Resort 2020

Hunter Mountain

- Most Googled Resort in the Northeast, <https://snowbrains.com/top-5-most-googled-ski-resorts-in-the-united-states/>

Labrador Mountain

- Syracuse.com/Post Standard's CNY 2023 Readers' Choice Award for Skiing – 2nd Place.

Plattekill

- Jan 6, 2019 NYT front page story, Metro Section: <https://www.nytimes.com/2019/01/04/nyregion/catskills-skiing-plattekill-mountain.html>
- Feature story in POWDER Magazine Dec/Jan issue: <https://www.powder.com/stories/forever-wild/>
- Snowfarmers Documentary on Vimeo: <https://vimeo.com/270014059>

Woods Valley Ski Area

- Business of the Year - June 2016 - Presented by Rome Area Chamber of Commerce and Business Journal New Network
- Tourism Industry Recognition - October 2019 - Oneida County Tourism

Winter Visitor Spending

Winter visitor spending is the largest component of the total economic impact of the New York ski industry. Winter visitor spending reflects skiers and snowboarders (including tubers and other visitors) spending money at the ski resorts and at other establishments during their ski trip (such as food, equipment rental, and lodging for those staying overnight). It also includes visitor spending at restaurants, retail stores, and hotels not owned by ski area companies. **Total direct winter visitor spending (both on-mountain and off-mountain) is \$511.6 million.**

Table 3
Winter Visitor Spending, 2022/23

	Percent of Snowsports Visits	Number of Snowsports Visits	Estimated Spending per Snowsports Visit	Skier/ Snowboarder Spending
Day/local visitors	66.7%	2,489,782	\$105.95	\$263,792,419
Overnight - paid accommodations	26.3%	979,815	\$217.90	\$213,501,662
Overnight - friends/family or second home	7.0%	261,610	\$131.34	\$34,359,814
TOTAL	100.0%	3,731,207	\$137.13	\$511,653,895

The skier mix and spending per skier visit figures cited in Table 3 above, separated into three categories, are derived from NSAA National Demographic study and ski resort operator survey.⁹ As seen in the table, the average day visitor (66.7% of New York State snowsports visits) spends \$106 per day, overnight visitors in commercial lodging (26.3% of visits) spend \$218 per day, and the average overnight visitor staying with family/friends or in accommodations they own (7.0% of visits) spends \$131 per day. The blended average per person per day spending in the winter season is \$137.

Ski areas in New York State hosted 3,731,207 downhill snowsports visits in the 2022/23 season.

It is particularly important to note the importance and economic impact of the ski resort industry during the four-month winter season in which these businesses primarily operate. Tourism is an important industry in New York State throughout the year, but the summer months tend to dominate this industry. The winter months represent the low season in most tourism areas in the state, with the exception of those regions where skiing and snowboarding is offered. In other words, the ski resort industry provides economic value at a particularly important time of the year. Also, its presence allows for year-round employment opportunities for residents of these areas of the state and provides for a diversified and year-round economy.

Summer Visitor Spending

Many ski areas in New York also have summer operations, including water parks, hotels, golf courses, spas, concerts and events, hiking, mountain biking, zip lining, and summer chairlift/gondola rides. Hotels and golf courses are particularly important contributors to summer operations; for example, Windham Mountain owns and operates a hotel and Hunter Mountain manages a hotel, while Peek n' Peak and Holiday Valley each own and operate golf courses. An indoor water park and outdoor challenge course is a highlight of Greek Peak. All the ORDA facilities have summer operations, from mountain biking to scenic chairlift rides to festivals. While the summer direct visitor spending is less than winter, it remains important to

⁹ Skier mix data is specific to New York ski areas and is current as of 2022/23 (or most recent available data for some ski areas). Skier expenditure per visit data is based on more generalized figures for the Northeast US in 2015/16 and inflation-adjusted forward, with reasonableness checks from 2022/23 resort operator revenue data and more recent skier expenditure surveys conducted in other states.

quantify in this analysis. Again, this summer figure also includes spending at restaurants, retail stores, and hotels not directly owned by the ski area companies.

According to ski area operator surveys, the **average share of annual revenue attributable to summer operations at New York ski areas is 12.0 percent**. This percentage was used to estimate the volume of summer visitation. As well, summer visitors were estimated to spend 80 percent of what winter visitors spend on a per person per day basis.¹⁰ The mix of day and overnight visitors was assumed to be the same in summer as it is in winter (66.7% day, 33.3% overnight).

As such, total summer visits at ski areas in New York State were estimate at 507,580. The blended average spending per visit is about \$110 (\$85 for day visitors, \$174 for overnight visitors in commercial lodging, and \$105 for overnight visitors with other accommodations).

As seen in Table 4 below, the **total direct summer visitor spending is estimated at \$55.7 million**.

Table 4
Summer Visitor Spending, 2022/23

	Percent of Summer Visits	Number of Summer Visits	Estimated Spending per Summer Visit	Summer Visitor Spending
Day/local visitors	66.7%	338,701	\$84.76	\$28,708,315
Overnight - paid accommodations	26.3%	133,291	\$174.32	\$23,235,212
Overnight - friends/family or second home	7.0%	35,588	\$105.07	\$3,739,279
TOTAL	100.0%	507,580	\$109.70	\$55,682,807

¹⁰ For context, ORDA's 2022/23 Economic Impact Analysis indicates that its summer visitors also spend less per day than its winter visitors, per guest research. Specifically, visitors staying in commercial lodging spend an average of \$168 per person/per day in summer (vs. \$206 in winter); visitors staying with friend and relatives spend an average of \$114 pp/pd in summer (vs. \$138 in winter); and day visitors spend an average of \$50 pp/pd in summer (vs. \$75 in winter).

Total Annual Visitor Spending

Combining winter visitor spending and summer visitor spending results in total annual visitor spending. As seen in Table 5 to follow, the ***annual visitor spending attributable to the ski industry is \$567 million.***

It is important to note the share of visitor spending that occurs at the ski area company itself (sometimes called “on-mountain spending”) and the share which occurs at related businesses in the area that are not owned by the ski area company (sometimes called “off-mountain spending”).

Total expenditures attributable to ski area visitors (winter and summer combined) is \$567 million. Of this total, approximately 62% goes directly to ski resort businesses, and **38% goes to other businesses in the area.** Overall, ski area operators realize about \$83 per visitor, or \$353 million, of skier spending. Other businesses also receive about \$51 per visitor, or \$215 million in total.

Table 5
Total Visitor Spending and
Share to Ski Areas and Other Businesses, 2022/23

	Spending per Visit	Ski Area Visitor Spending	Share of Visitor Spending
Estimated resort operator revenues	\$83.22	\$352,749,981	62.2%
Estimated revenues accruing to other businesses	\$50.62	\$214,586,721	37.8%
Total visitor direct expenditures	\$133.84	\$567,336,702	100.0%

Snowsports Retail Expenditures

An additional component of the economic benefit of the snowsports industry in New York State, that is not captured in the trip-related expenditures detailed above, is retail purchases made specifically for downhill snowsports activities that occur at times other than ski trips. These retail expenditures include equipment (skis, snowboards, poles, boots, bindings, etc.), apparel (jackets, pants, base layers, etc.), and accessories (gloves, helmets, goggles, etc.). This economic activity is attributable to the presence of the downhill snowsports industry in New

York State. Most of these purchases are made in stores not owned by the ski area companies and are often made during pre-season time periods.

Downhill snowsports-related expenditures, distinct from other sales made in these same retail stores, is estimated through data collected by Circana and reported at the Outdoor Retailer expo. Total retail spending in the US specialty stores on snowsports equipment, apparel, and accessories was \$4.86 billion in the 2022/23 season (in stores, not online purchases). On a per skier basis, retail spending was \$419. Given the number of individuals who ski and/or snowboard in New York State, the total retail expenditures in New York State were \$252.8 million. Subtracting the retail revenue garnered directly at ski areas in New York (\$22.3 million, a number already captured in the calculations above and removed here to eliminate double-counting) results in **a snowsports retail expenditure figure of \$230.5 million**. This figure can be added to the direct ski area visitor expenditures above to derive total direct consumer expenditures attributable the downhill snowsports industry.

Table 6
Total Snowsports Retail Spending, 2022/23

	Ski Shops/ Retail Spending
Retail spending at specialty stores (US Total)	\$4,860,000,000
Per person expenditures (national)	\$419
Total NY retail expenditures	\$252,807,502
LESS: Retail expenditures at NYS ski areas	\$22,287,345
Total non-ski area retail expenditures (NY State)	\$230,520,157

Source: Circana and RRC Associates

Capital Investment

Another major component of economic value in the ski resort industry is the level of capital investment that ski areas make in any given year. Many of the ski areas in the state have continued to make improvements with new lifts, hotels, lodges, parking lots, ski terrain, snowmaking systems, RFID ticketing systems, summer attractions, and other investments. These improvements have an important value to the economy that would otherwise not exist, typically employing contractors and other businesses to do the work. Therefore, capital spending is included in this report.

Because of the long-term nature of these capital investments, an argument could be made to include spending amounts from two and even three years prior in the economic value analysis. However, this report is focused only on the 2022/23 season and therefore only includes one year of capital investment. The **capital investment for ski areas in 2022/23 was an estimated \$112.9 million**, based on \$70.3 million reported by ORDA,¹¹ \$21.9 million reported for an additional 10 responding resorts, and an inferred \$20.2 million for non-responding resorts.

Table 7
Total Capital Investment, 2022/23

	Total Capital Investment
Total Capital Expenditures	\$112,900,000

Direct, Secondary, and Total Economic Impact

Economic impact incorporates direct and secondary (indirect and induced) impacts. Thus far, this report has focused on the direct impacts that ski areas generate. To estimate the indirect and induced effects, we have used industry-specific RIMS II (Regional Input-Output Modeling System) multipliers for New York state that have been produced by the US Bureau of Economic Analysis.

Table 8 to follow illustrates the estimated direct, secondary, and total economic impact attributable to the ski industry in New York. As shown:

- Direct economic impacts include \$717 million in economic output, 9,849 year-round equivalent jobs, and \$264 million in labor income.
- Secondary economic impacts include \$604 million in economic output, 3,268 year-round equivalent jobs, and \$167 million in labor income.
- Total economic impacts include \$1.322 billion in economic output, 13,117 year-round equivalent jobs, and \$432 million in labor income.

¹¹ As reported in ORDA’s 2022/23 Economic Impact Analysis, this includes \$45.3 million at Gore Mountain, \$13.8 million at Belleayre, and \$11.7 million at Whiteface. It excludes \$34.2 million at other ORDA facilities (Olympic Training Center, Olympic Center, Mt Van Hoevenberg, Veteran’s Memorial Highway, and Olympic Jumping Complex).

The total economic output, inclusive of direct and secondary effects, is \$1.322 billion.

Table 8
Total Economic Impact (Direct and Secondary), 2022/23

	Output (\$MM)	Employment	Labor Income (\$MM)
Winter Operations Direct Impact	\$433	7,301	\$152
Summer Operations Direct Impact	\$59	993	\$21
Non-Ski Area Retail Direct Impact	\$113	871	\$35
Capital Expenditures Direct Impact	\$113	683	\$56
Total Direct Impact	\$717	9,849	\$264
Winter Operations Secondary Impact	\$367	2,004	\$98
Summer Operations Secondary Impact	\$50	273	\$13
Non-Ski Area Retail Secondary Impact	\$102	558	\$28
Capital Expenditures Secondary Impact	\$85	434	\$28
Total Secondary Impact	\$604	3,268	\$167
TOTAL IMPACT (Direct + Secondary)	\$1,322	13,117	\$432

Additional Economic Benefits

Charitable and In-Kind Donations

Many ski areas are important members of the local community, supporting charitable and other causes by donating either cash or in-kind donations, such as free lift tickets, lessons, season passes, or other products. The value of those donations is an important contributor to the local economy, though the specific amounts were not documented in this report.

Other Benefits

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

Introducing First-Timers to the Sport

A major focus of many New York ski areas is to bring get more people physically active and outdoors in the winter. As such, the state is well known for teaching beginners to ski and snowboard for the first time. In the 2022/23 season, it is estimated that approximately 160,000 people learned to ski and snowboard at ski areas in New York State.

Kids Ski or Ride for Free: 3rd and 4th Grade Passport

The Ski Areas of New York sponsors a program to bring kids into the sport called the *3rd and 4th Grade Ski and Ride Passport*. For a \$41 processing fee, the Passport provides all 3rd and 4th graders from anywhere (not just New York State residents) an opportunity to experience skiing and snowboarding, broadening their horizons and exposing them to a fun and healthy activity. The program has cumulatively enrolled more than 50,000 kids over time. Childhood obesity is a major challenge today and providing a variety of opportunities for kids to be active in a safe and fun environment is critical to solving the problem. As well, skiing and snowboarding are lifelong sports that kids can continue to enjoy after they grow up. The *3rd and 4th Grade Passport* program is evidence of a strong commitment among the SANY member resorts to provide recreational opportunities to kids and to expose them to new experiences.

Kids Learn to Ski or Ride for Free

The Kids Learn to Ski or Ride Passport is the perfect program for those who do not ski or are true beginners. With the Learn to Ski or Ride program, a child receives a lift ticket, lesson and equipment rental free at all participating ski areas. There are over 20 ski areas throughout New York State participating in the Learn to Ski or Ride program.

Quality of Life Impacts

Overall, alpine ski resorts have a positive impact on the quality of life in the parts of the state in which they operate. They provide a sense of community, civic pride, something that local residents identify with and are a part of, and other intangible benefits. An appreciation for natural beauty and the environment is also enhanced through the skiing experience.

As well, the location of the ski areas is very evenly distributed throughout the state (as opposed to being concentrated in a certain geographic sector of the state). There is a ski resort within 90 minutes of nearly every major New York metro area; this distribution makes skiing and snowboarding an important contributor to employment and quality of life for residents all over New York State.

Business Attraction and Retention

By providing an important quality of life amenity, ski areas in New York State likely also serve to enhance business attraction and retention. Employers which have choices where to locate typically factor in quality of life considerations for attracting and retaining employees. The

availability of skiing likely plays into that quality of life calculus for many businesses and workers.

Events and Exposure

Media coverage of events at ski areas provides terrific promotional and branding exposure that can be worth much more than the events themselves cost. Some of the larger events which garner significant regional and national media coverage include World Cup alpine racing at Whiteface, major winter carnivals, snowboarding freestyle competitions, and numerous other events and festivals. These events bring new visitors to the regions and provide media exposure to potential customers to visit in the future.

Health and Wellness Benefits

Skiing provides one of the few opportunities for outdoor recreation during the winter, a season in which many people stay inside and exercise less. All participants, from kids to Baby Boomers and beyond, reap positive health benefits from skiing and snowboarding. The importance of providing opportunities for exercise cannot be overstated, especially as more Americans become overweight and obese. Ski areas in New York provide the opportunity to get outside in the winter and get exercise, fresh air, and a release from day-to-day stress. Again, the winter season has more limited opportunities for outdoor exercise, so the presence of ski areas is an important factor in keeping New York residents healthy.

Conclusion

This Economic Impact Analysis provides a conservative estimate of the value of the ski resort industry in the State of New York. Through direct winter and summer impact and capital investment impact, the ski resort industry plays a critical role in the New York economy, particularly during the December through March period of the year when other segments of the tourism economy tend to be at a seasonal lull.

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

- Total Economic Output (direct and secondary), based on the winter and summer visitor spending, is **\$1.322 billion**.
- Total jobs attributable to the presence of the ski resort industry in the state of New York is **13,117** (including full time and part time positions).

- Total Labor Income (employee wages & benefits and proprietor income) is **\$432 million**.

Additional detailed findings include the following:

- Direct Winter Visitor Spending for the 2022/23 season was **\$511.7 million**. This figure includes alpine skiing, tubing, retail, equipment rental, lodging, ski lessons, and other direct consumer spending as a result of the New York alpine snowsports industry.
- Direct Summer Visitor Spending for the 2022 summer season, including hotels, golf, weddings, water parks, mountain biking, sightseeing, festivals, and other activities, was **\$55.7 million**.
- Snowsports Retail Expenditures are an additional economic benefit of skiing and snowboarding in New York State and include retail expenditures made specifically for the sports – equipment, apparel, and accessories. The direct expenditures in this retail segment are estimated at **\$230.5 million** (excluding purchases made at ski area-owned shops).
- Capital Investment, representative of one year of investment for the 2022/23 fiscal year, was **\$112.9 million**.
- New York has the largest number of operating ski areas of any state in the US (52 areas in 2022/23) and is typically fifth in terms of total skier visits (3.7 million skier visits in 2022/23, and an average of 3.6 million annually over the past five seasons).
- Skiing and snowboarding facilities are particularly important to more rural areas of New York, frequently anchor the economy in the communities in which they reside. Skiing and snowboard also help provide seasonal balance to the tourism economy, which in many areas skews more to summer.
- Other important benefits include quality of life impacts, business attraction and retention, charitable donations, health and wellness impacts, events and exposure, and the 3rd and 4th Grade Passport program.

About Ski Areas of New York

Ski Areas of New York, Inc (SANY) is The Voice of New York Skiing.

SANY is dedicated to the continued growth of the New York snow sports industry by working on behalf of its membership to promote fair legislation, develop marketing programs, create educational opportunities and enhance the public awareness of snow sports throughout the State and region.

SANY is a trade organization that serves its members by acting as a facilitator, negotiator, educator, marketer, business analyst, legal advisor, information collector, and distributor and sometimes even a referee. Many of the responsibilities that we have undertaken are simply just expected and, some of the time, our members are unaware of the full scope of our operations. This is all by design. By operating as a support organization for the industry, our products and programs help to foster new and continued business for our members. By continually staying abreast of the latest technology and opportunities for our industry, we hope to grow the sport for generations to come.

Some of the services we provide to our members are as follows:

- Ski Conditions Reporting
- Ski Area Promotion
- Third and Fourth Graders Free for Kids Ski & Ride Passport Program
- We host the SKI NY-PSAA EXPO, a consumer ski show, with our partner organization, the Pennsylvania Ski Areas Association
- Representation in Albany
- Annual Seminars and Trade Show
- Annual Economic Surveys
- Salary/Wage Survey
- Database/Mailing List Access
- License Plate Program

About RRC Associates

RRC Associates is a multi-disciplinary consulting firm providing market research, strategic analysis, and community/land planning services. Principal areas of focus by RRC Associates include the ski and snowboard industry in particular, and the travel, tourism, and recreation industries generally. In these subject areas the firm is considered national experts and are frequently quoted and contacted for information concerning trends and opportunities. RRC also provides research and analysis services in a diversity of related and adjacent areas, including economic and fiscal impact analysis, market demand analysis, competitive analysis, customer demographic profiling and benchmarking, and customer satisfaction assessments. Additionally, RRC provides a wide range of community planning studies for a variety of public agencies and communities as well as private entities.

RRC is the leading market research firm in the snowsports industry and tracks many statistics and figures for the industry throughout North America. RRC publishes annually on behalf of the National Ski Areas Association (NSAA) the Kottke End of Season and Demographic Report and the Economic Analysis of US Ski Areas, two industry reports that track patterns of significance related to operational, demographic, and financial information,. RRC also collects Canadian skier demographic data for the Canadian Ski Council, giving us an unparalleled depth of understanding of the North American snowsports industry. Additionally, we have conducted state-level economic analyses of the ski industry for the following organizations:

- Ski Areas of New York
- Colorado Ski Country USA
- Ski Utah
- California Ski Industry Association
- Ski Idaho
- Ski Maine
- Pennsylvania Ski Areas Association
- North Carolina Ski Areas Association
- Ski Wisconsin
- Michigan Snowsports Industries Association
- Minnesota Ski Areas Association

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