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# COLORADO SKI/SNOWBOARD COMMUNITY OPINION SURVEY

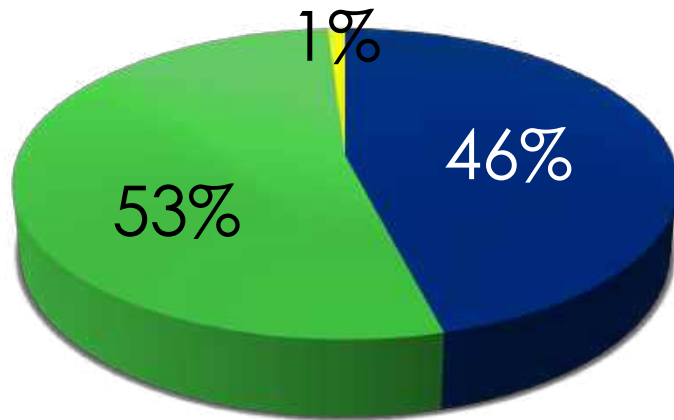
November 10<sup>th</sup> to 16<sup>th</sup>, 2020



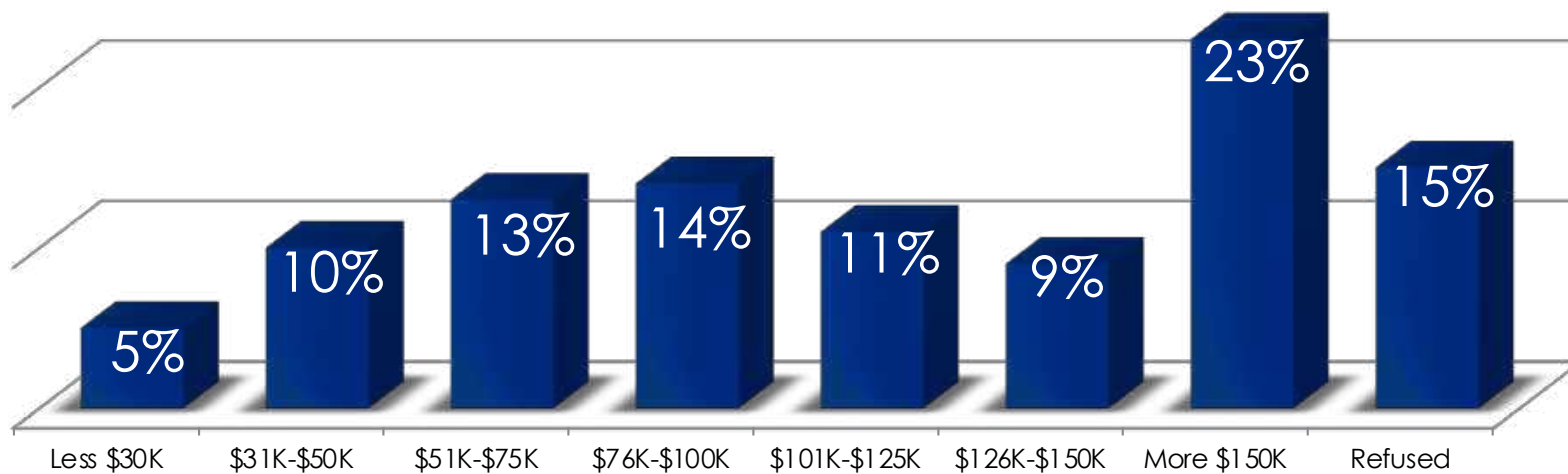
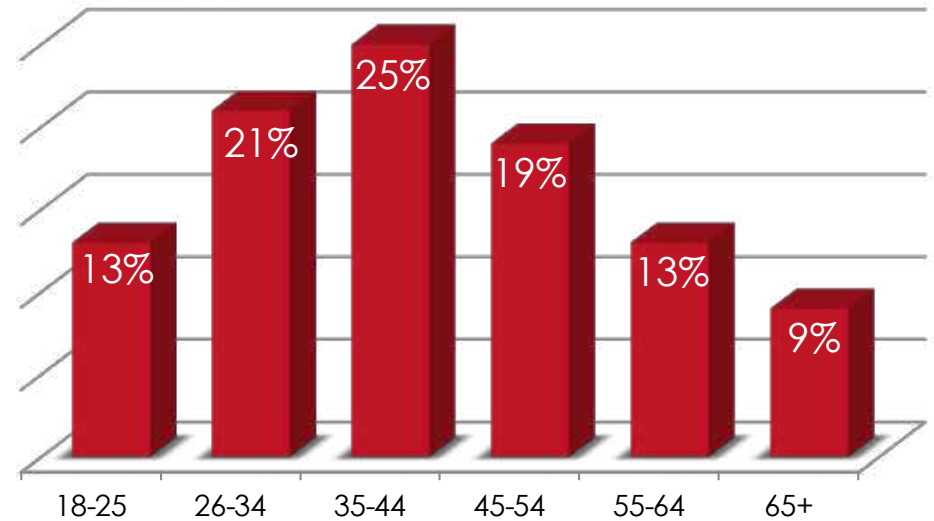
# Methodology

- Magellan Strategies is pleased to present the findings of a survey of 788 adult Colorado skiers and snowboarders.
- The interviews were conducted from November 10<sup>th</sup> to November 16<sup>th</sup>, 2020.
- The overall survey has a margin of error of +/- 3.49% at the 95% confidence interval. Subgroups of voters will have higher margin of error than the overall population.
- The interviews were conducted by sending a text invitation to respondents.
- The survey results were not weighted to any population demographic or subgroup.

# Survey Demographics

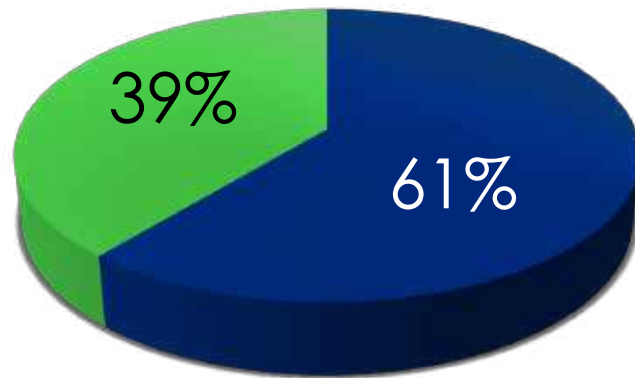


■ Male ■ Female ■ Identify Differently



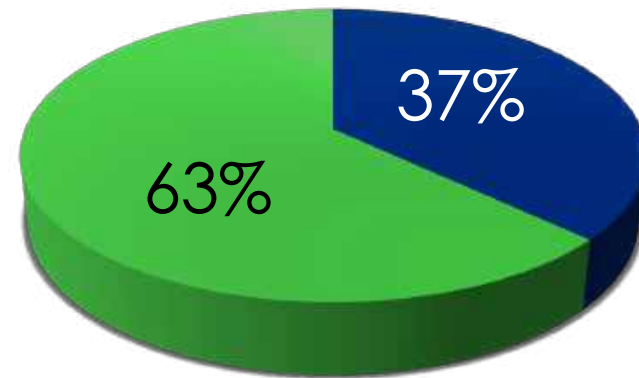
# Survey Demographics

## Area You Live In?

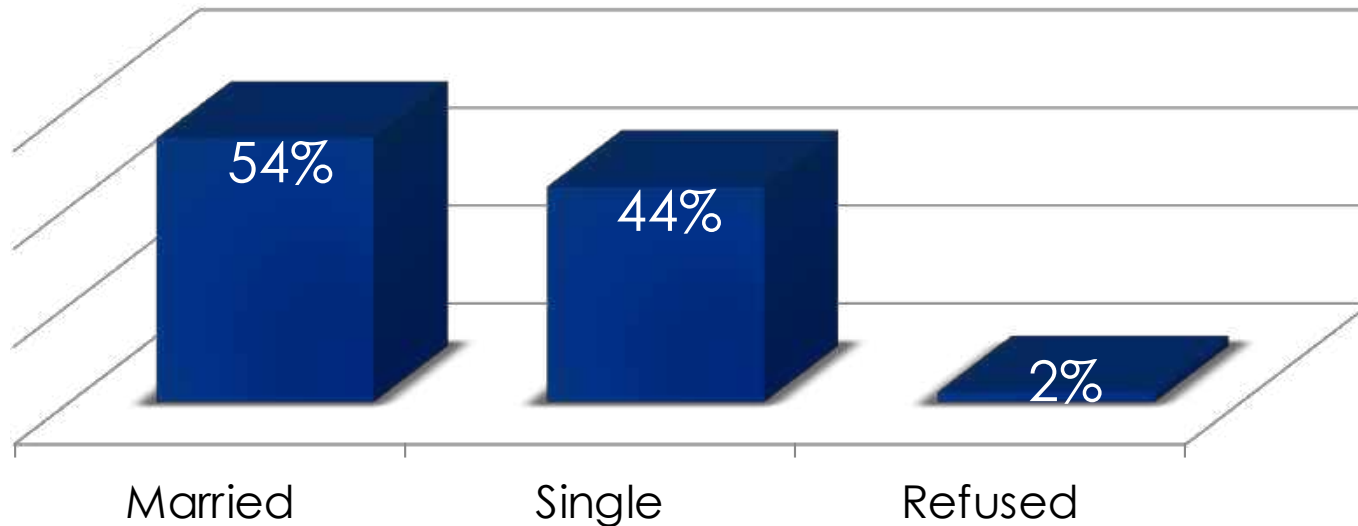


■ Local      ■ Front Range

## Children Under 18 in Household?

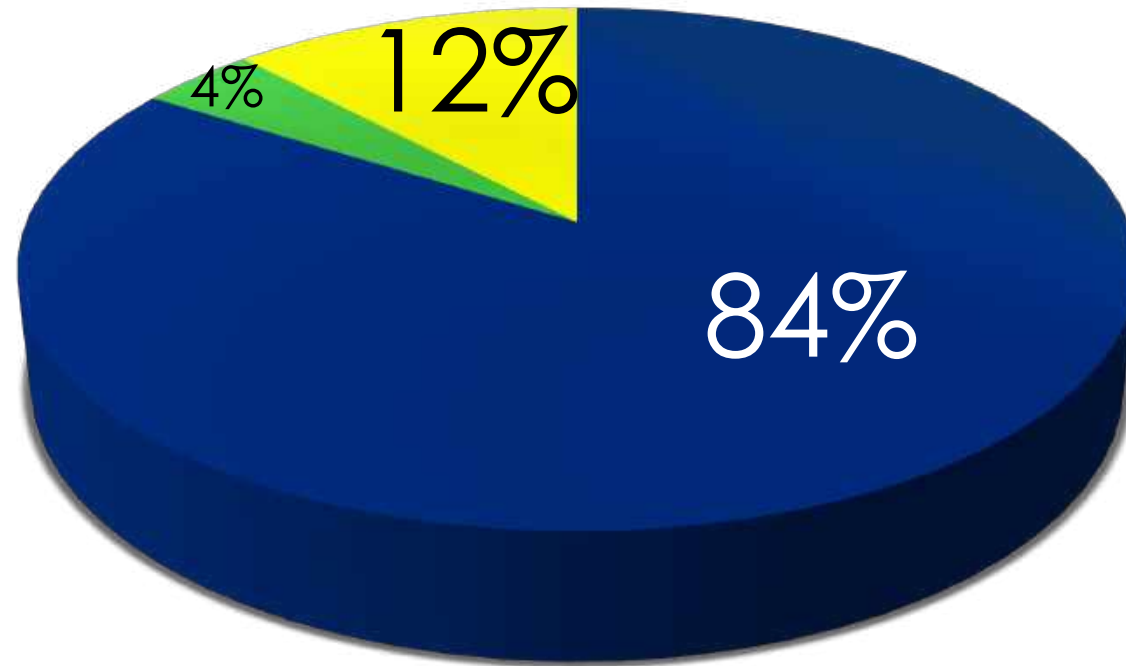


■ Yes      ■ No/Refused



# Survey Demographics

*Do you mostly ski or snowboard at a ski resort or do you mostly ski or snowboard in backcountry areas?*

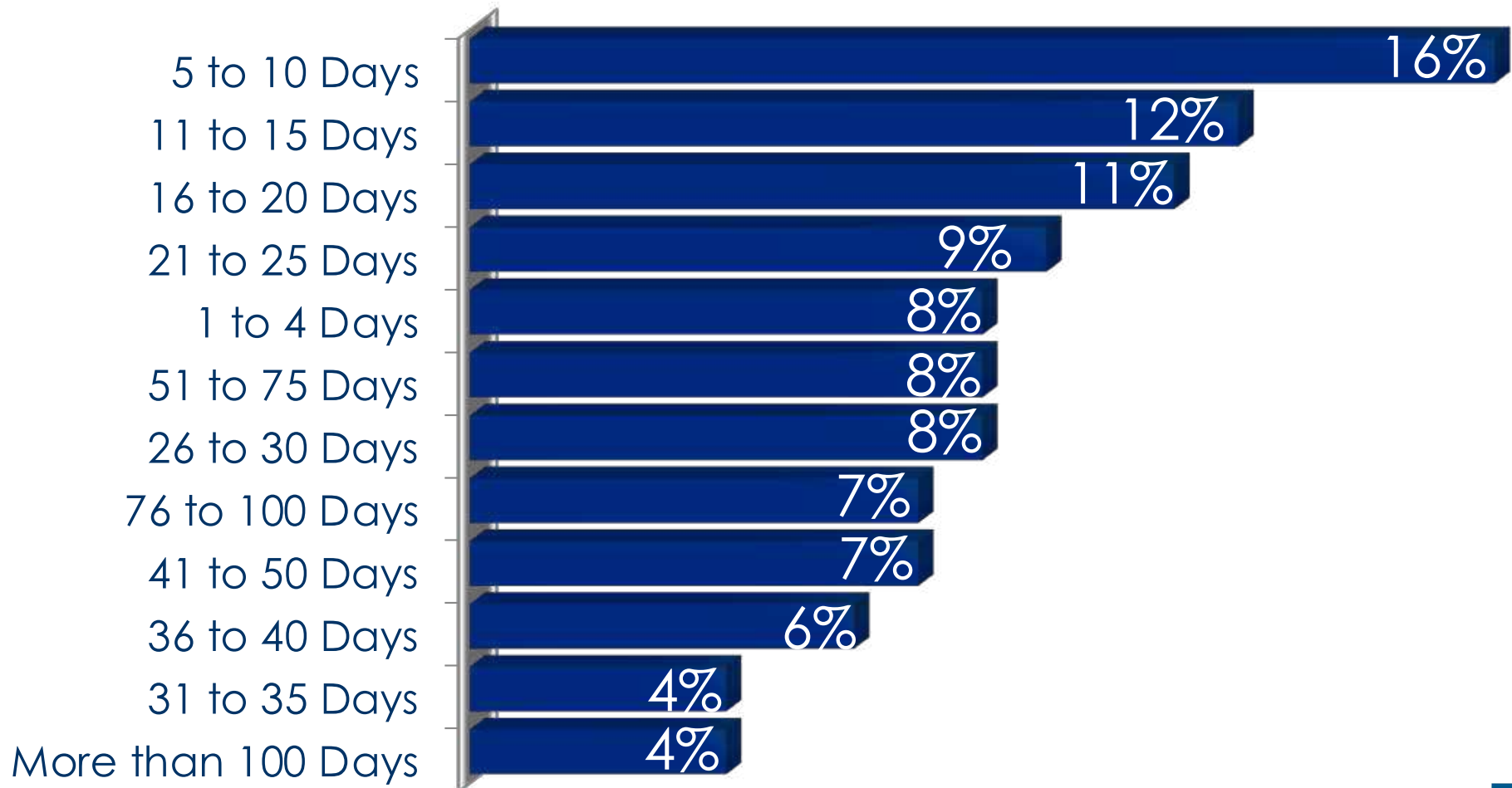


■ Ski Resort    ■ Backcountry    ■ Both Equally/Refused

Only Ski Resort	44%
Mostly Ski Resort	40%
Only Backcountry	1%
Mostly Backcountry	3%

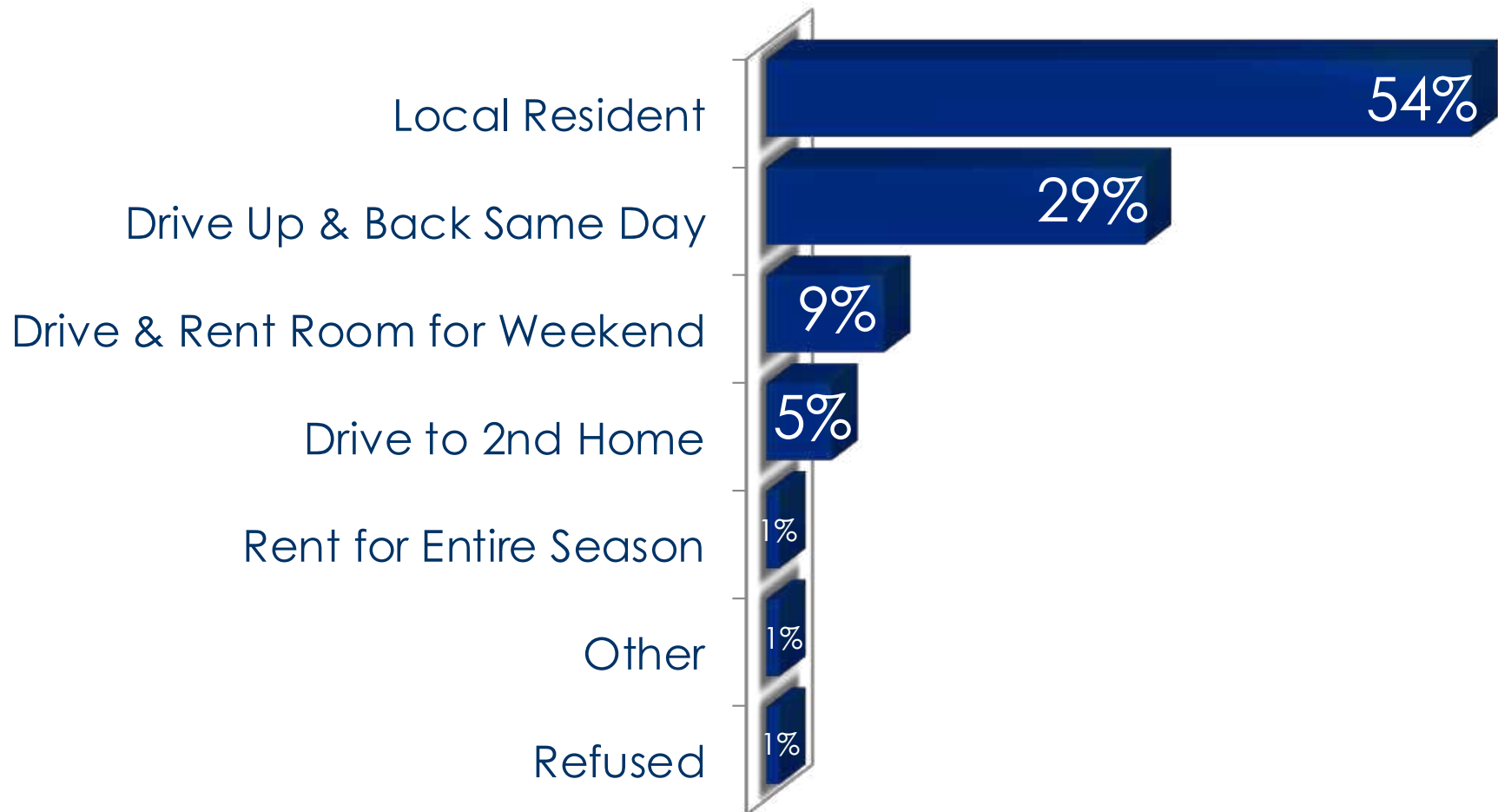
# Survey Demographics

*How many days in a typical season do you ski or snowboard assuming good conditions with plenty of snow?*



# Survey Demographics

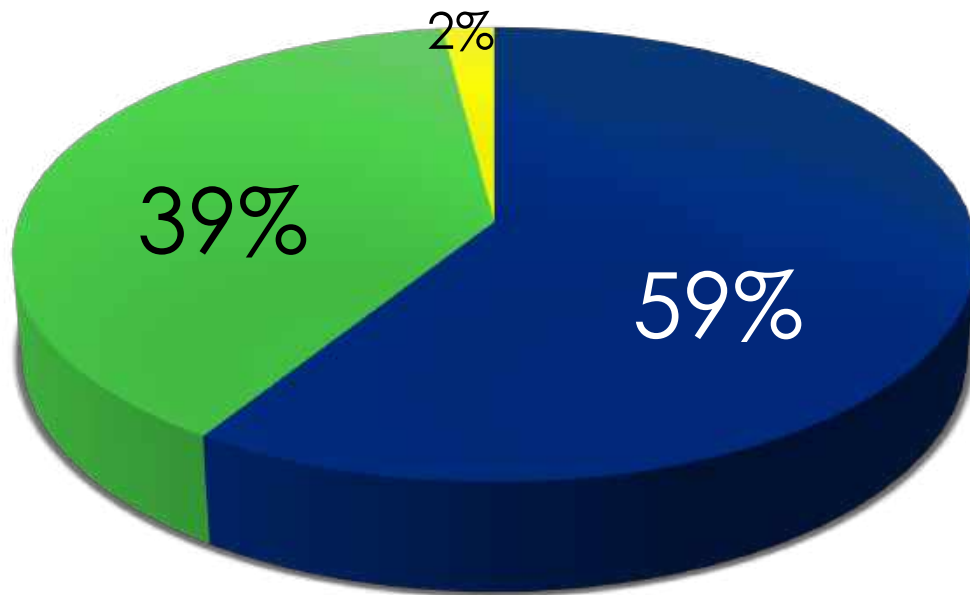
*Which of the following best describes your travel and lodging arrangements for a typical ski day in Colorado?*



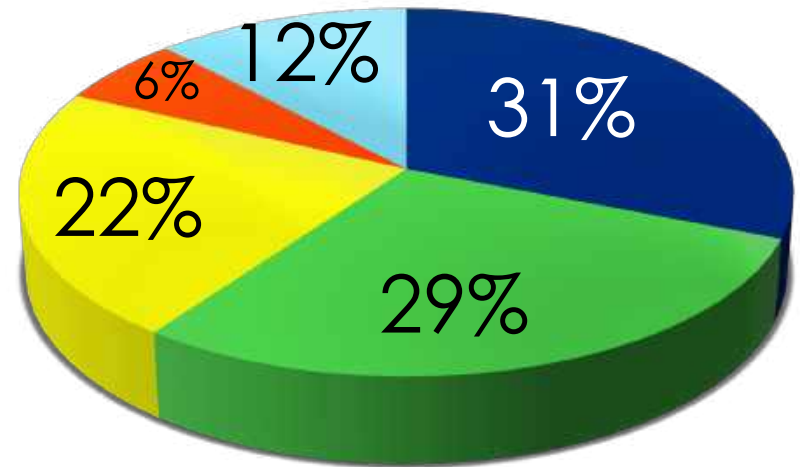
# Survey Demographics

Which of the following options best describes the ski pass you purchased this season? (Asked only to 465 respondents who purchased a ski pass. Margin of error is +/- 4.5%)

Did you purchase a ski pass for the upcoming season?



■ YES    ■ NO    ■ REFUSED

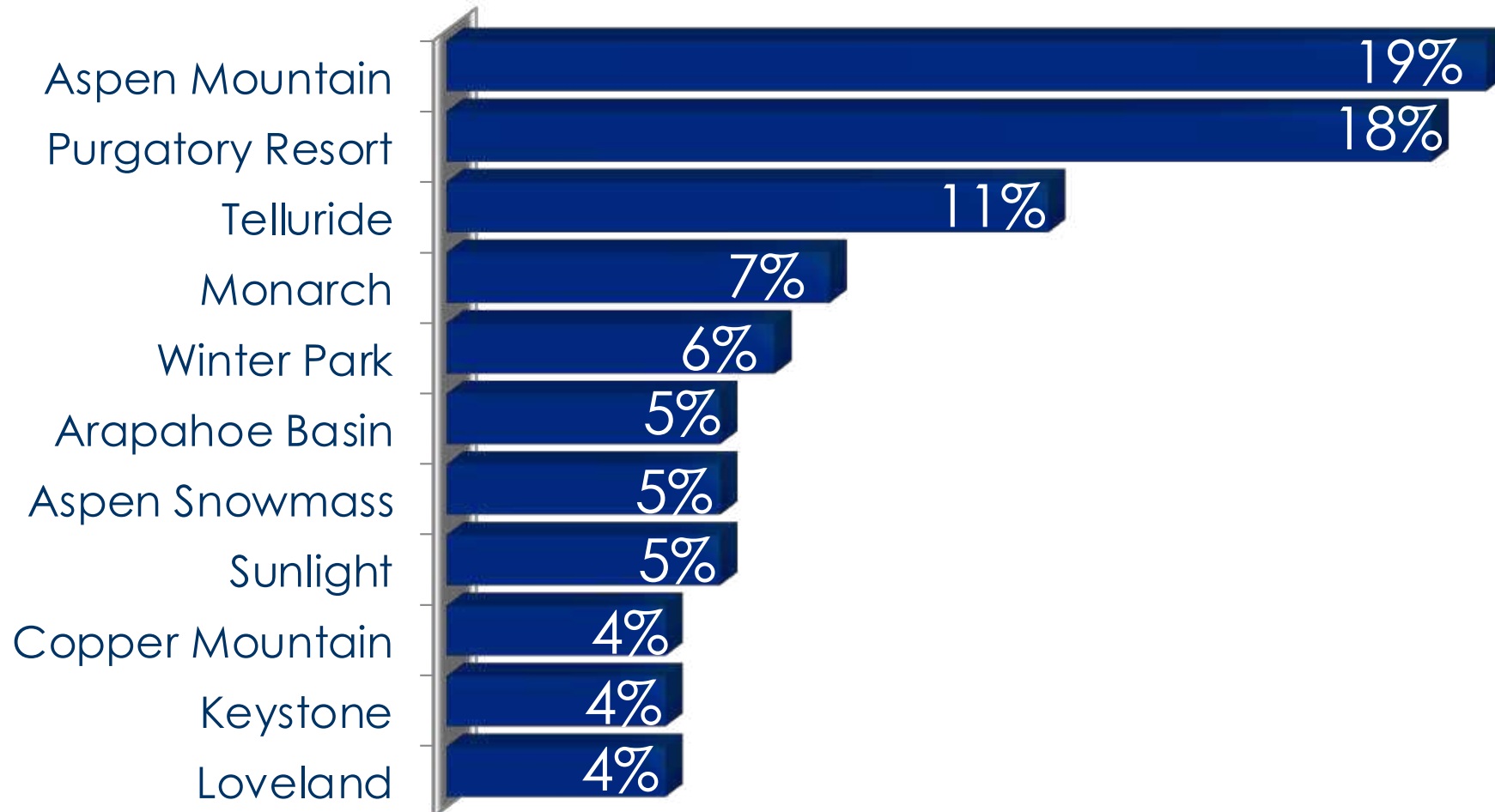


■ EPIC PASS  
 ■ RESORT SEASON PASS  
 ■ IKON PASS  
 ■ BOTH EPIC AND IKON PASS  
 ■ OTHER

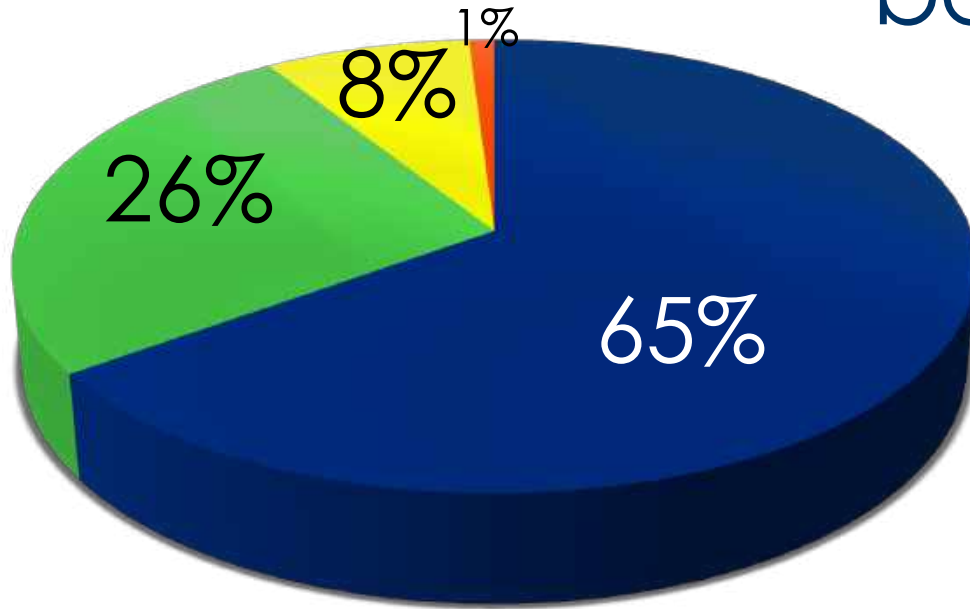


# Survey Demographics

*For which of the following ski resorts did you buy a season pass?  
(Partial list of responses shown. Question was only asked to 137  
respondents who purchased a season pass at a resort.  
Margin of error is +/- 8.3%)*



# Are you primarily a skier, a snowboarder or both?

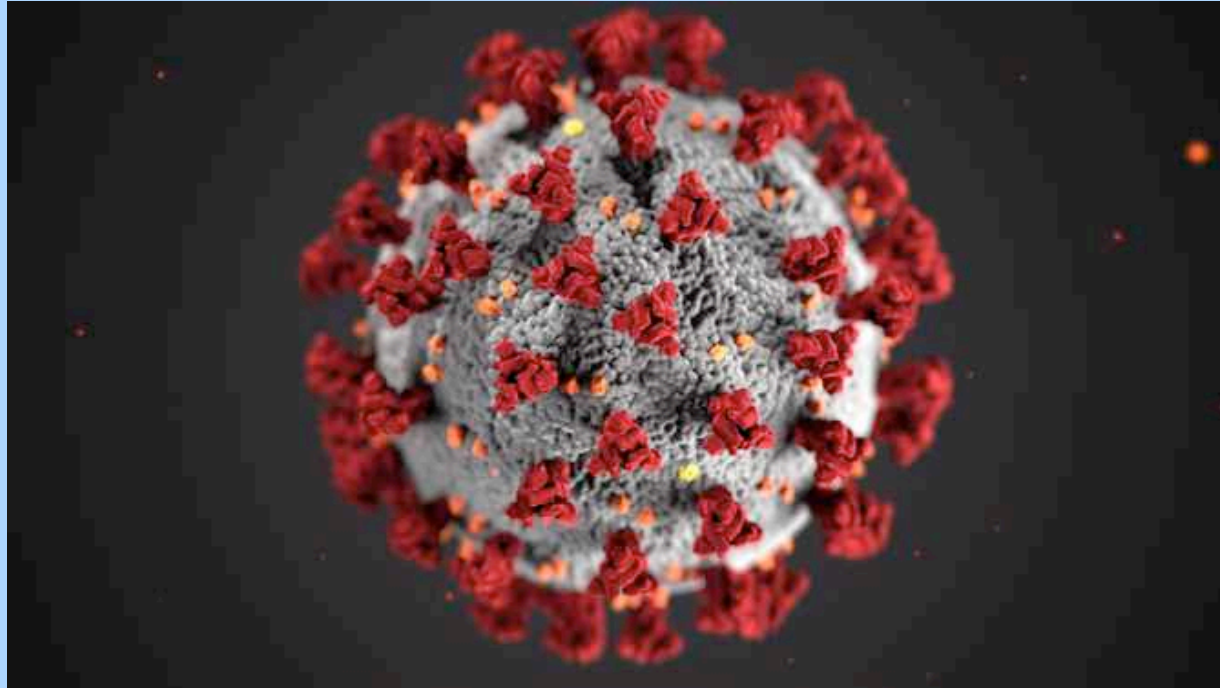


- TOTAL SKI
- TOTAL SNOWBOARD
- BOTH EQUALLY
- REFUSED

Only Ski	54%
Mostly Ski	11%
Only Snowboard	18%
Mostly Snowboard	8%

The age group with the highest percentage of snowboarders is 26-44 (38%), and they are more likely to be male than female.

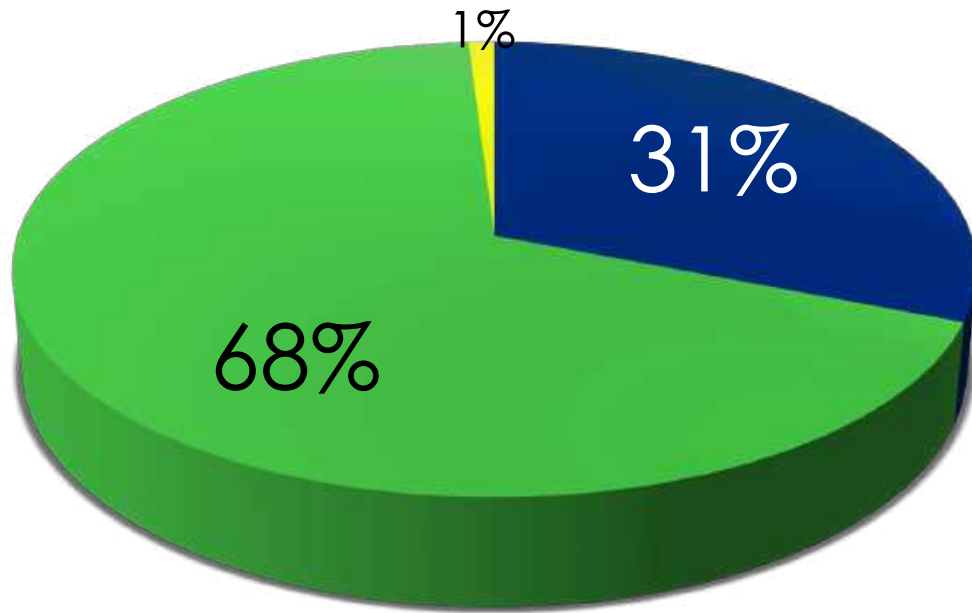
By comparison, less than 10% of respondents over the age of 55 are snowboarders. The vast majority are only skiers.



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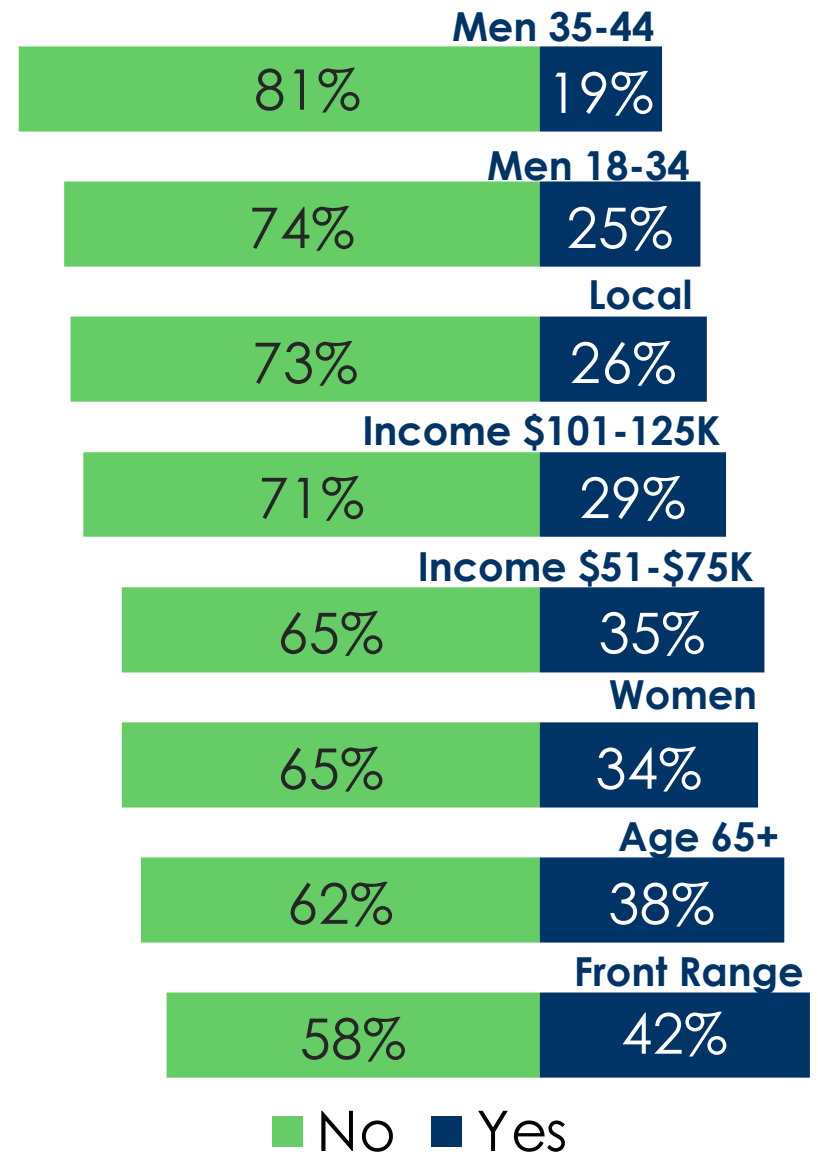
# IMPACT OF COVID-19 ON DECISIONS TO SKI OR SNOWBOARD THIS SEASON

# Are you or your family considering not skiing or snowboarding at all this season because of the coronavirus?



■ YES ■ NO ■ REFUSED

Strongly Considering	14%
Somewhat Considering	17%



## Reasons for Not Skiing or Snowboarding this Season

*“Being as specific as possible, please describe the reasons why you are considering not skiing or snowboarding this season.”*

season seems risk lines people don t mountain crowded resorts  
don t want going limited Covid money ski year will  
Coronavirus days concerned reservations able pass make reservations  
also lodge make virus



# Reasons for Not Skiing or Snowboarding this Season

*"Being as specific as possible, please describe the reasons why you are considering not skiing or snowboarding this season."*

*"Because of the limitations on having to make a reservation. I can't predict when I'll be able to ski and I've heard there are no reservations to be had. It's not OK to make people do that."*

**-Female, 45-54, Jefferson County**

## Major Themes

Risk from Others Not Following Guidelines

Frustration with Reservation Systems

Money is Tight / Not Worth the Money

*"Not sure how available days are, scared of heading to the mountain and being turned away because they are at capacity."*

**-Male, 25-34, Chaffee County**

*"Lack of lodge capacity due to social distancing, skier disregard for mask-wearing and social distancing, high prices for food and lift tickets in the middle of a pandemic/economic downturn, no-refund policies at major resorts."*

**-Male, 55-64, Boulder County**

*"Shuttle buses are too crowded and that is the only way to access our resort from day parking. Public restrooms are severely limited. There is no indoor place to get warm except on mountain or base restaurants. No lodge. People here are massively entitled and really don't care about affecting the people around them, so long as their day is not affected."*

**-Female, 35-44, Garfield County**

*"The risk of potentially getting Covid is biggest reason but also the experience of the mountain I feel won't be the same. Reservations to park, the restrictions on number of people in lodge/restaurants. It just doesn't seem worth the cost for a less than experience."*

**-Female, 35-44, Arapahoe County**

*"I think the ski resorts will need to shut down again at some point. It's a lot of money to get my whole family get read to ski each season, and I don't think it's worth it because things will just shut down. Also, I don't want to have to deal with reservations."*

**-Female, 35-44, Douglas County**



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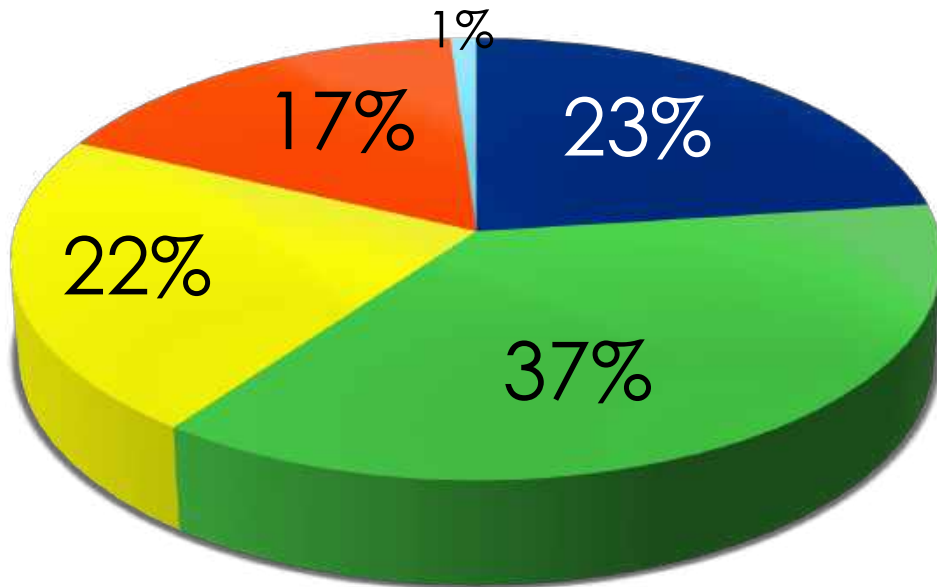
# AWARENESS OF NEW RULES AND SAFETY PROCEDURES AT SKI RESORTS

# New Rules and Safety Procedures

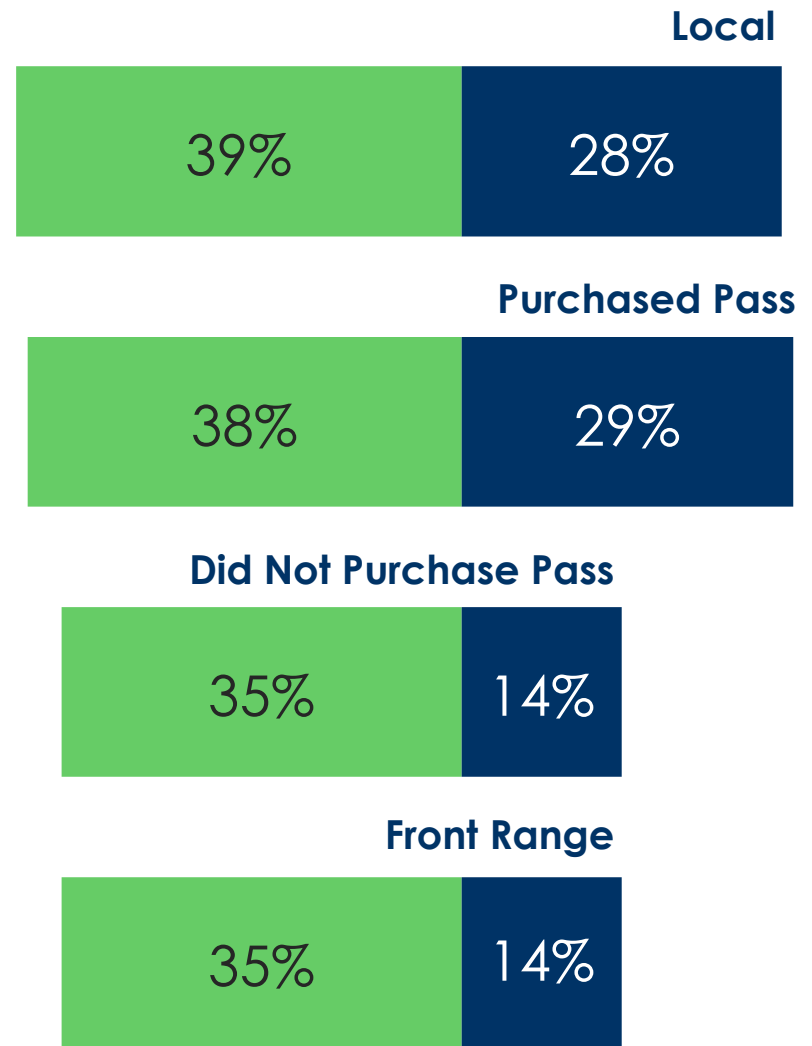
*“As you may know, Colorado’s ski resorts are working closely with state, local and federal health professionals to develop rules and procedures to protect the health and safety of skiers, snowboarders, and employees from the coronavirus...”*



## How familiar would you say you are with new rules and safety procedures at your primary ski resort or local mountain?

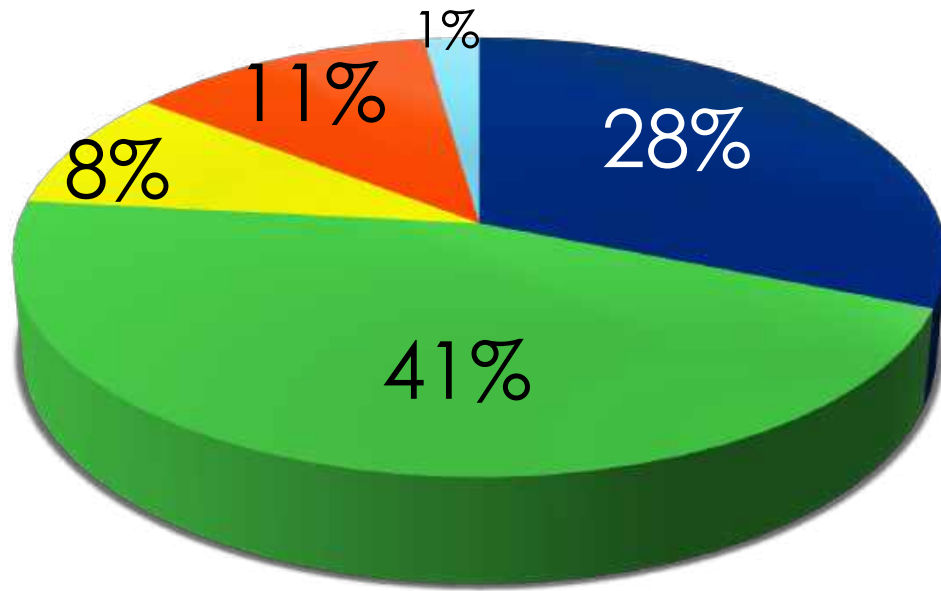


- VERY FAMILIAR
- SOMEWHAT FAMILIAR
- NOT TOO FAMILIAR
- NOT FAMILIAR AT ALL
- REFUSED

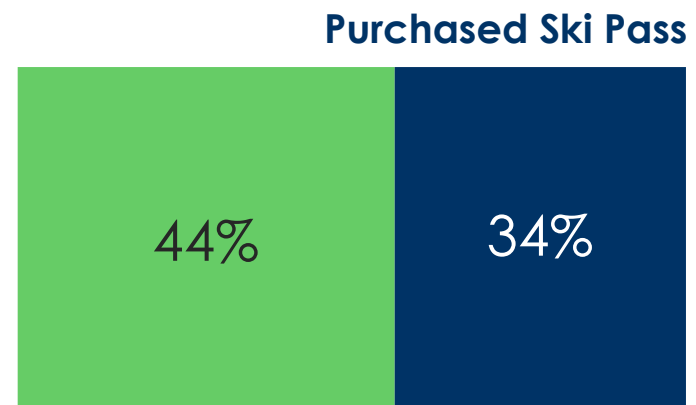
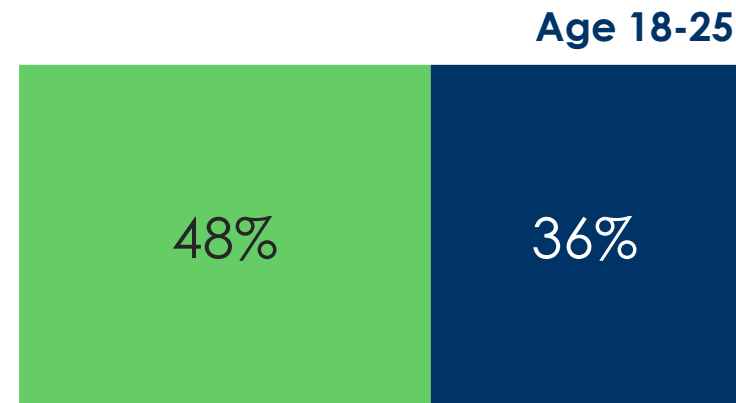


- Somewhat Familiar
- Very Familiar

*Regardless of how familiar you are with the new rules and safety procedures at your primary ski area, how confident are you that the rules and safety procedures will keep employees, you and your family safe from the coronavirus?*

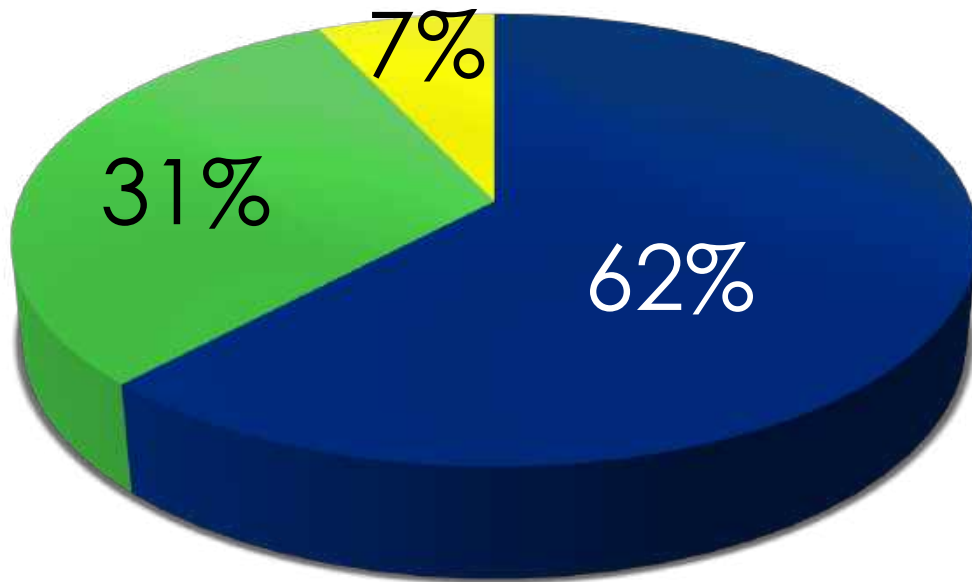


- VERY CONFIDENT
- SOMEWHAT CONFIDENT
- NOT TOO CONFIDENT
- NOT CONFIDENT AT ALL
- REFUSED



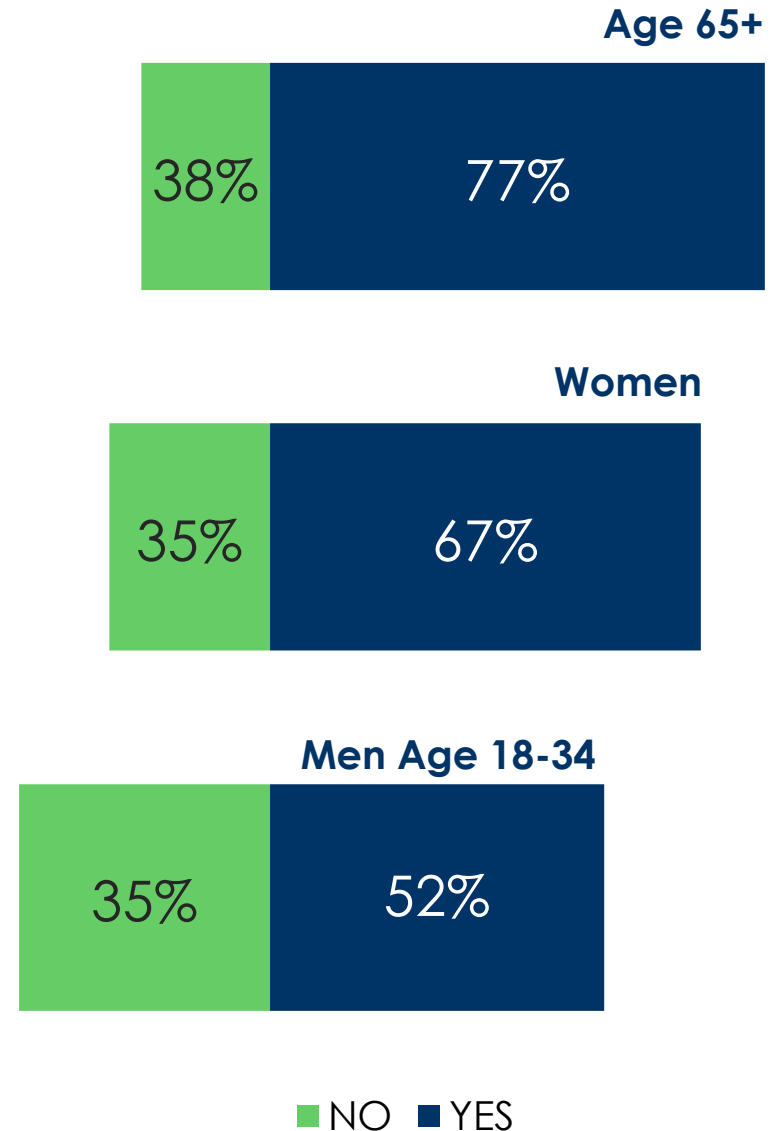
- Somewhat Confident
- Very Confident

*Do you trust elected officials to make the right public health decisions when it comes to keeping ski resorts open or closing them down for a period of time?*



- TOTAL YES, TRUST
- TOTAL NO, DO NOT TRUST
- UNSURE/REFUSED

Strongly Trust	20%
Somewhat Trust	42%



## Suggested Safety Procedures that Would Inspire Confidence

*“Being as specific as possible, please describe any rules or safety procedures that would give you confidence that you and your family were safe and protected from the coronavirus.”*

feel safe share chairlift come everyone skiers group less keep way feel  
required make Clean open year inside Limiting people areas wear  
bathrooms Limited capacity need don t know family ski resorts  
one already restaurants day gondola employees lodges  
eating time bar Limit enforce resort face covering

## Suggested Safety Procedures that Would Inspire Confidence

*“Being as specific as possible, please describe any rules or safety procedures that would give you confidence that you and your family were safe and protected from the coronavirus.”*

*“Mandatory face masks on lift lines. Cleaning of gondolas and chairs regularly. Reminding people to social distance even when outdoors and skiing.”*

**-Female, 55-64, Pitkin County**

*“Riding the chairlift with your friends and family only and not strangers would feel safer. I think the tourists will be flying on planes and spreading the virus. Wearing a mask!”*

**-Female, 45-54, Ouray County**

*“Limit number of people in shuttle buses, temperature checks with pass checks. Incentives to stay away for people who booked but have the coronavirus. More picnic tables and grill throughout the mountain for social distance lunching.”*

**-Male, 35-44, Jefferson County**

### Major Themes

Social Distancing

Mandatory Face Masks

Only Friends and Family Together

Strict Enforcement of the Guidelines

*“Enforce the guidelines, period....it really is difficult to remember to follow these guidelines...for us all...but we need employees to have authority to enforce....and at same time empathize with guests who need to be constantly reminded.... but enforce...this will pass if we all contribute.”*

**-Male, 35-44, Grand County**

*“I think the best thing they can do is segregate groups on lifts/gondola rides. Aside from that, there’s tons of room to spread out on the mountain.”*

**-Female, 25-34, Adams County**

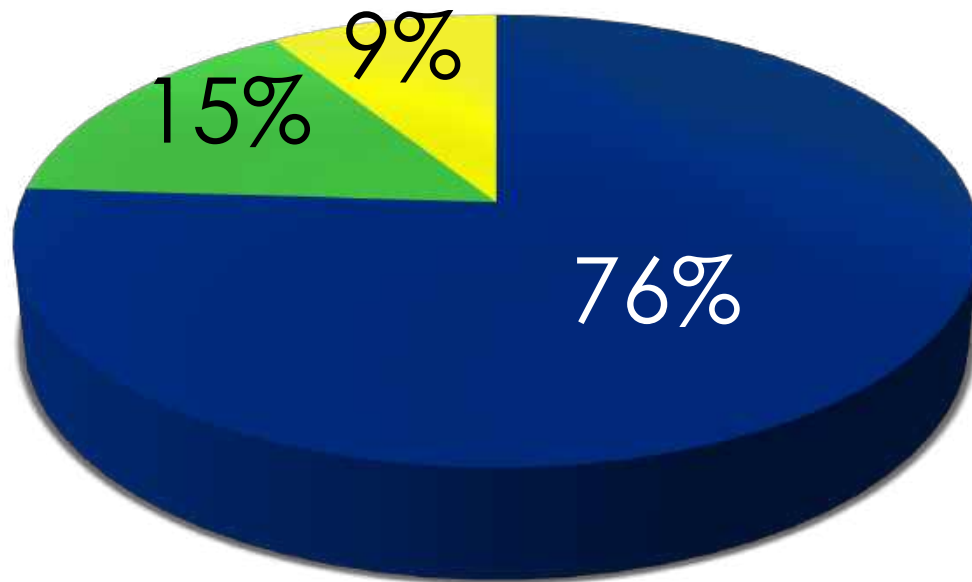
*“Having a zero-tolerance policy and kicking people out who don’t abide by the rules.”*

**Male, 35-44, Denver**

*“Covers over chairlifts, only people from the same group on a chairlift together, much greater spacing enforced in lift lines, to-go food only on the mountain served outdoors.”*

**-Female, 45-54, Routt County**

*Do you trust the ski resorts to provide a quality snow-riding experience with the new rules and procedures in place?*



- TOTAL YES, TRUST
- TOTAL NO, DO NOT TRUST
- UNSURE/REFUSED

Strongly Trust	34%
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Somewhat Trust	42%
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Younger respondents are more likely to trust resorts to provide a quality experience, including 84% of respondents age 18-25.

There are no other significant differences across other major demographic subgroups.

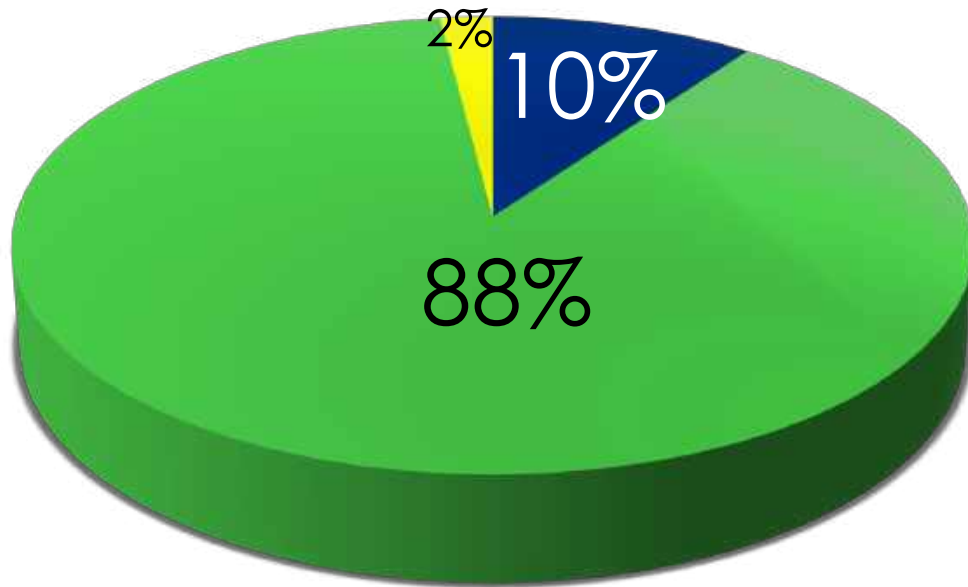


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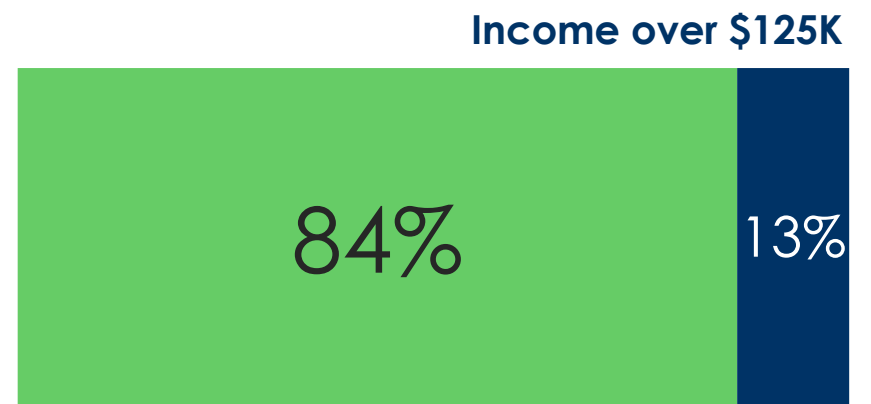
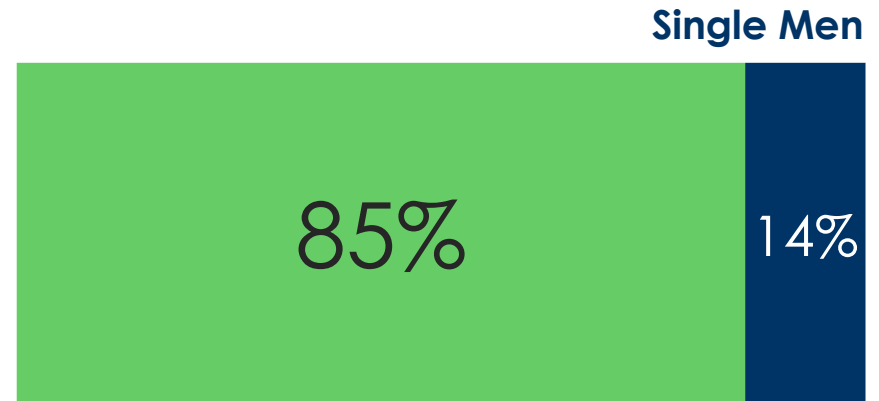
INTENTION TO FLY TO A SKI  
DESTINATION THIS SEASON



# Do you or your family intend to fly to a ski destination this season?



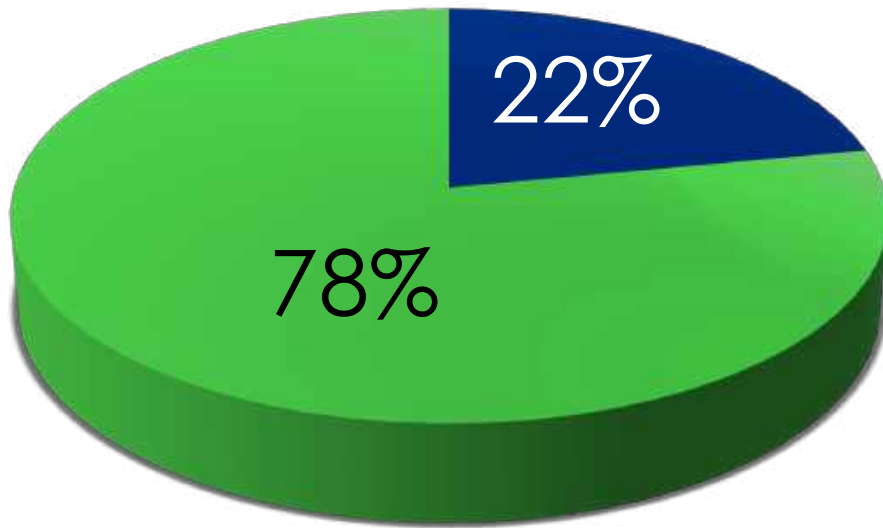
- YES
- NO
- REFUSED



- No
- Yes



*When choosing your ski destination, was nearby access to quality health care facilities an important factor in your decision in case you or a family member were infected with the coronavirus? (77 respondents, Margin of Error +/- 11.1%)*



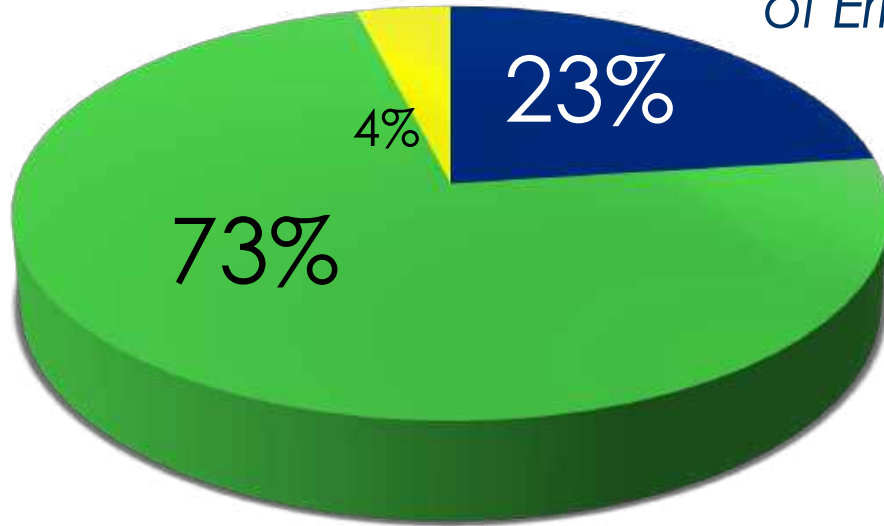
- TOTAL YES
- TOTAL NO
- REFUSED

Yes, Big Part	12%
Yes, Somewhat Part	10%

Access to quality health care and the resort's safety procedures were not significant factors in ski destination decisions.

Among these 77 respondents, there are no significant differences across major demographic subgroups.

*When choosing your ski destination, were the ski resort's safety rules and procedures to protect you from the coronavirus an important factor in making your decision? (77 respondents, Margin of Error +/- 11.1%)*



- TOTAL YES
- TOTAL NO
- REFUSED

Among these 77 respondents, there are no significant differences across major demographic subgroups.

Yes, Big Part	13%
Yes, Somewhat Part	10%

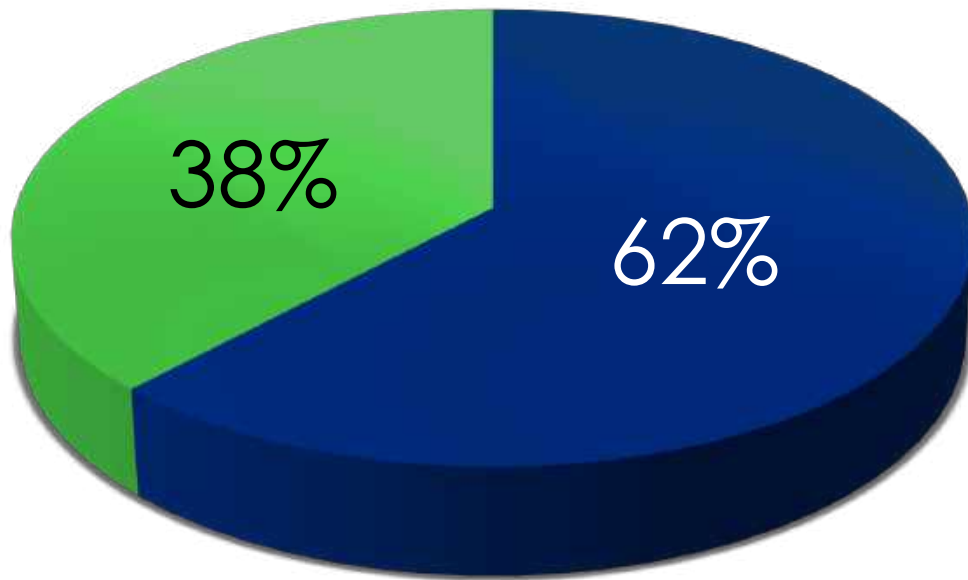


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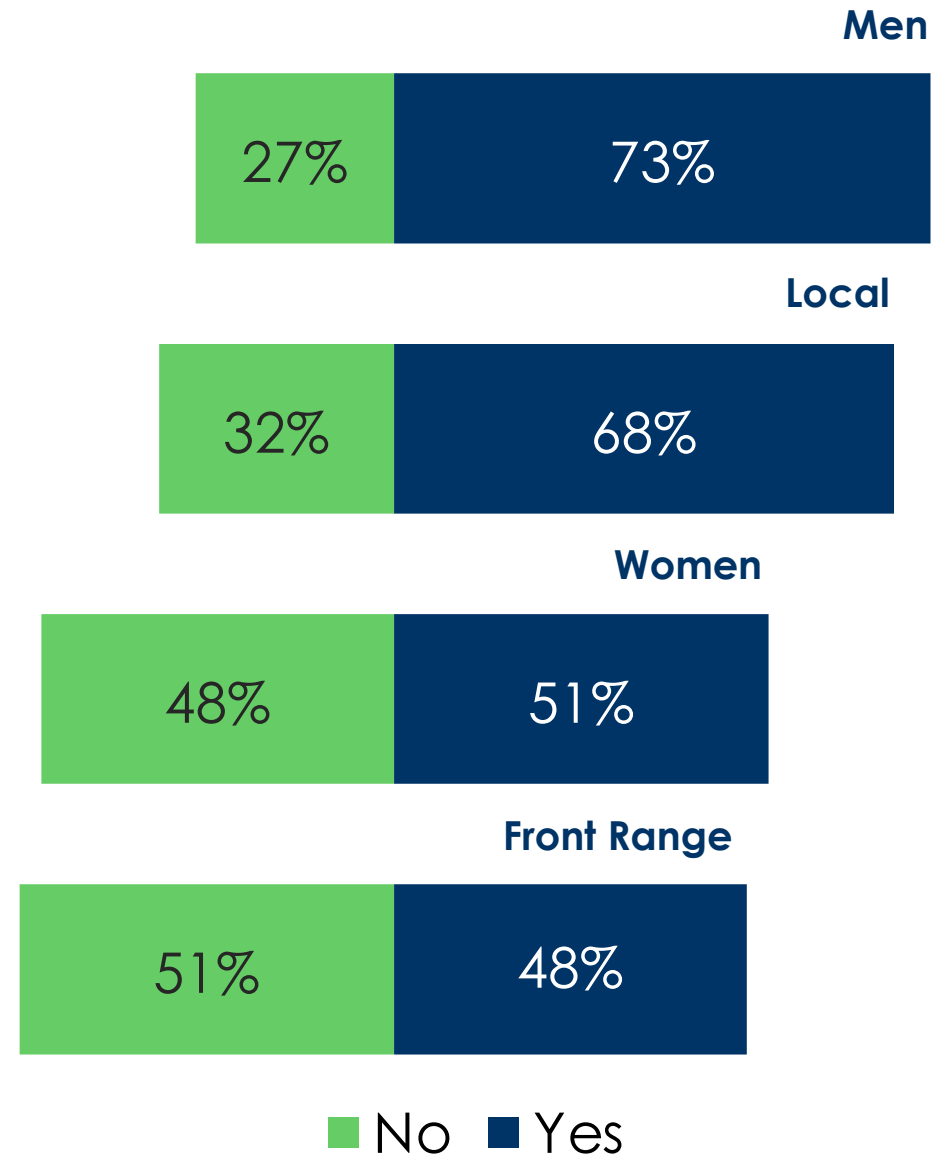
# INTEREST IN BACKCOUNTRY SKIING AND SNOWBOARDING THIS SEASON



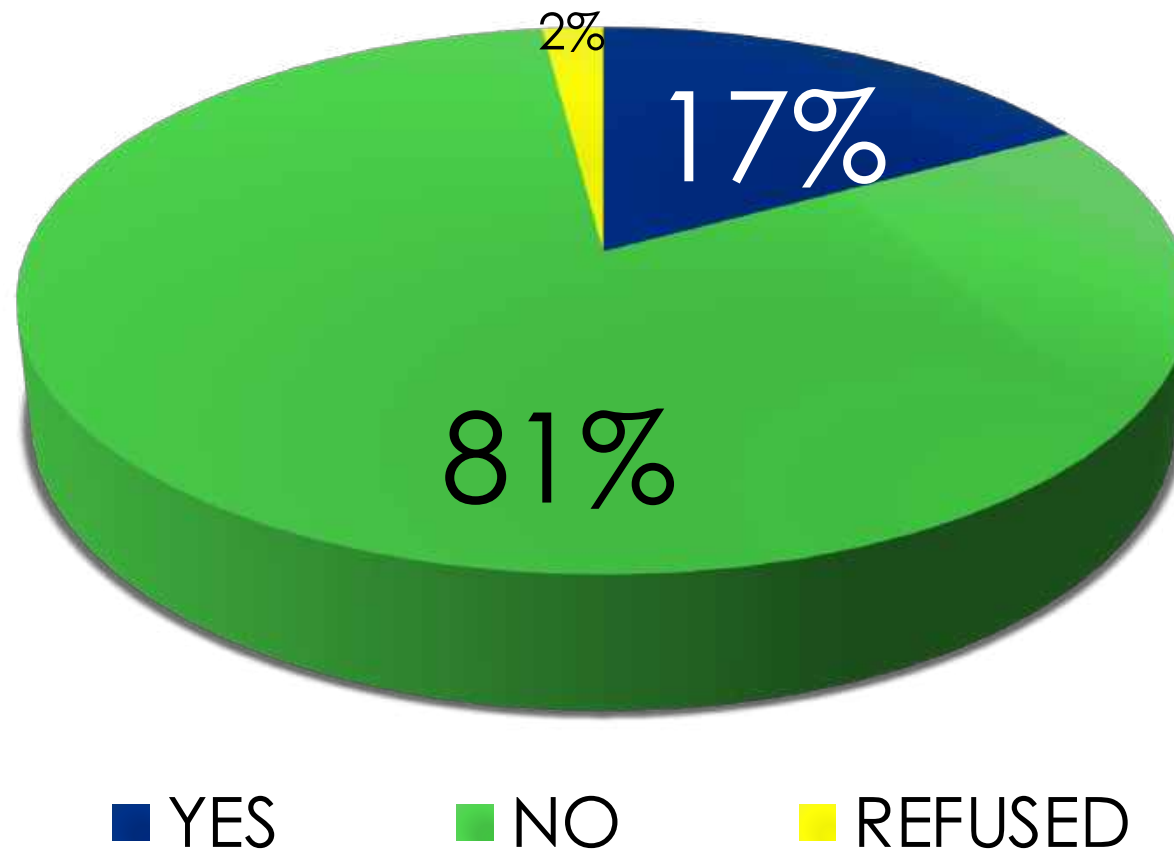
# Have you ever skied or snowboarded in a backcountry area?



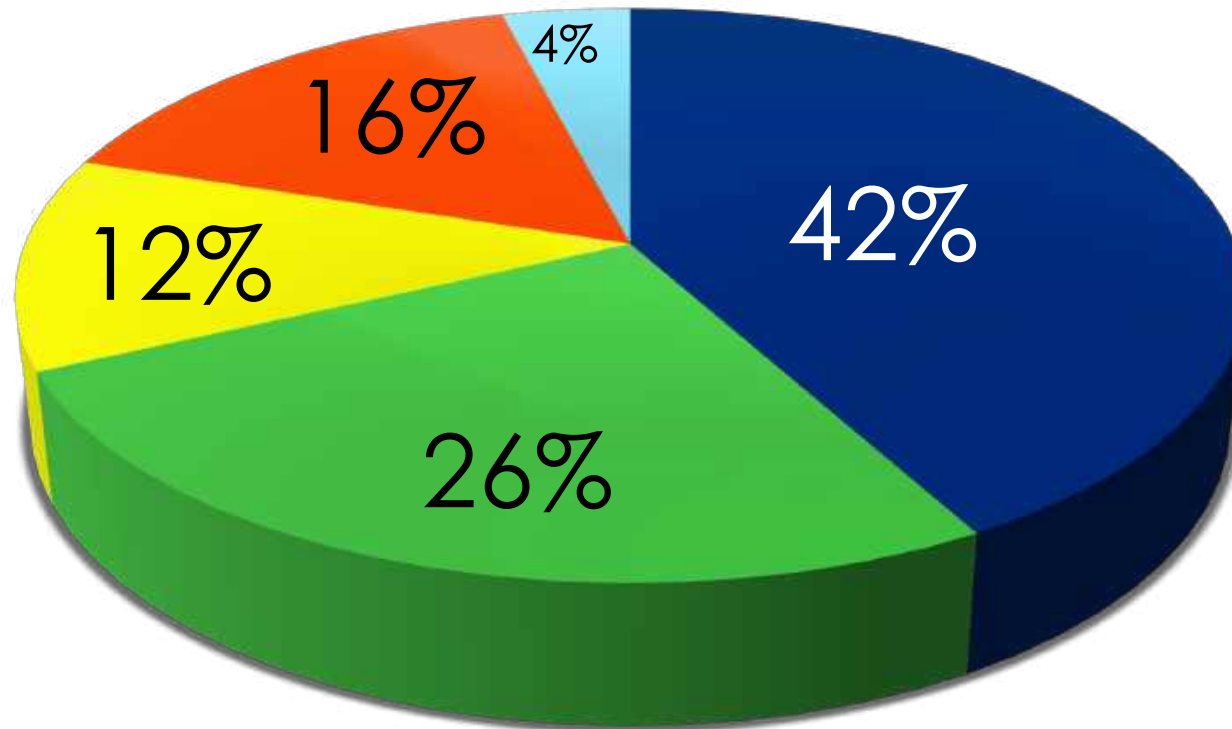
- YES
- NO
- REFUSED



*Do you have plans or a strong interest in experiencing backcountry skiing or snowboarding this season?  
(Asked to 300 respondents who have never skied or snowboarded in a backcountry area. +/- 5.6% Margin of error)*

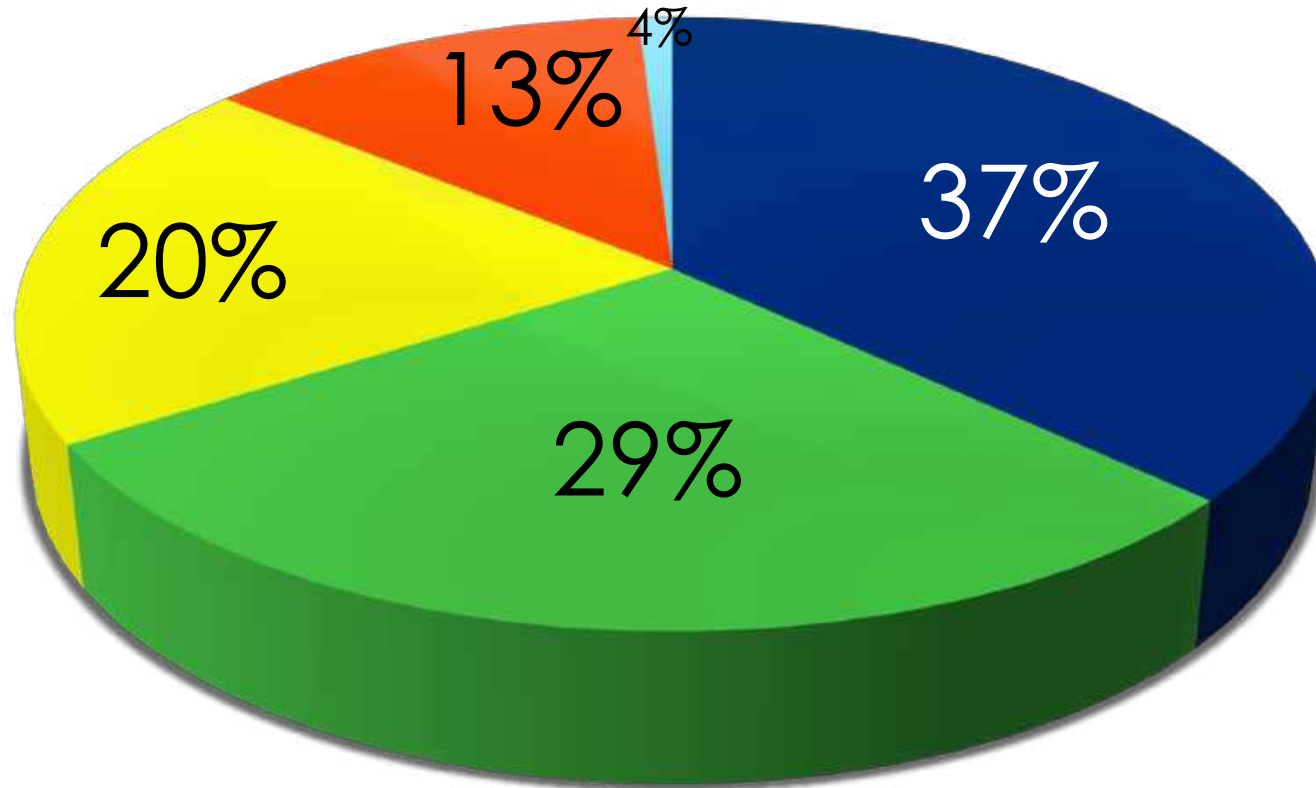


*Before you try backcountry skiing or snowboarding for the first time, do you plan on buying avalanche safety gear or take an avalanche awareness course? (Asked only to 50 respondents that intend to ski or snowboard in a backcountry area for first time. +/- 13.4% Margin of error)*



■ YES, BOTH ■ YES, SAFETY COURSE ■ YES, BUY GEAR ■ NO, NEITHER ■ REFUSED

*As someone who has experienced backcountry skiing and snowboarding, do you have avalanche safety gear, or have you taken an avalanche awareness course? (Asked to 486 respondents who have skied or snowboarded in a backcountry area. +/- 4.4% Margin of error)*



■ YES, GEAR AND COURSE

■ YES, HAVE GEAR, NO COURSE

■ UNSURE/REFUSED

■ NO, NO GEAR OR COURSE

■ YES, TAKEN COURSE, NO GEAR



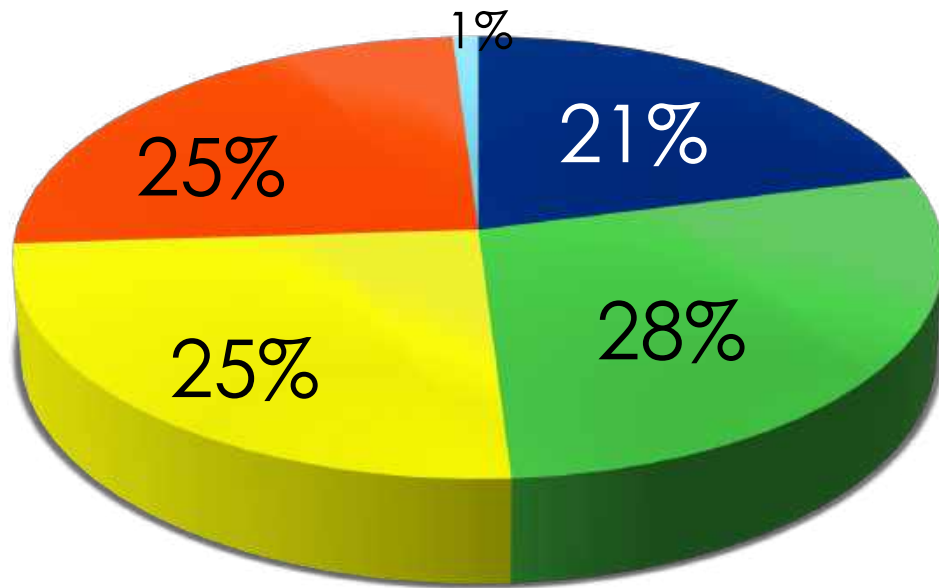
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# FAMILIARITY WITH RESORT RESERVATIONS SYSTEMS AND OPINIONS OF INDOOR DINING

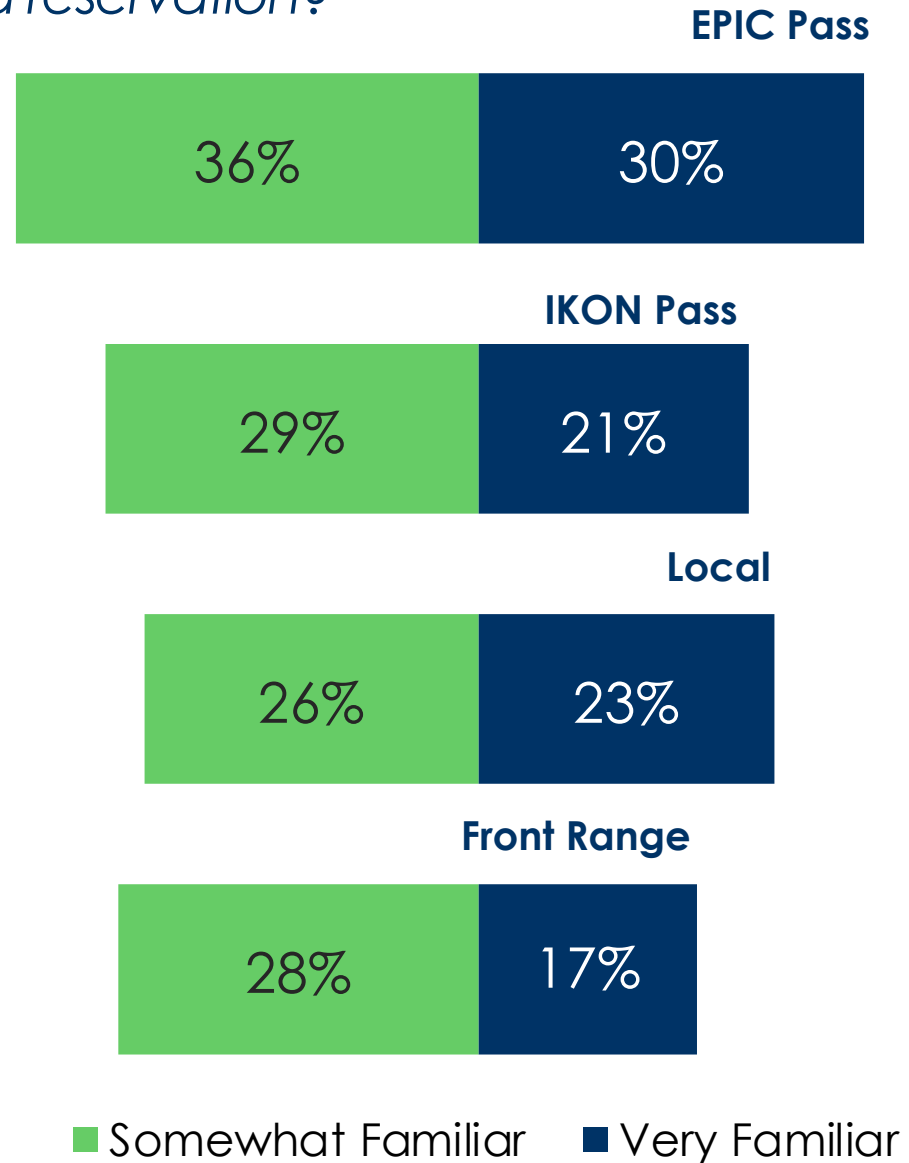




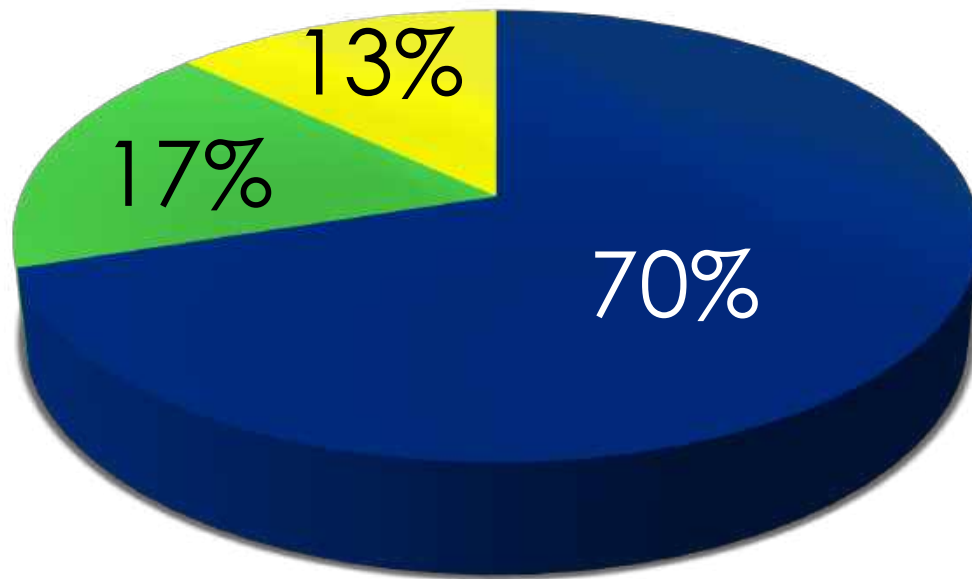
*How familiar are you with your primary ski resort's reservation policies and procedures for the upcoming season? To clarify, are you familiar with how to make a reservation, when to make a reservation and who does or does not need to make a reservation?*



- VERY FAMILIAR
- SOMEWHAT FAMILIAR
- NOT TOO FAMILIAR
- NOT FAMILIAR AT ALL
- REFUSED



*Do you trust the ski resorts to properly manage the reservation systems they put in place?*

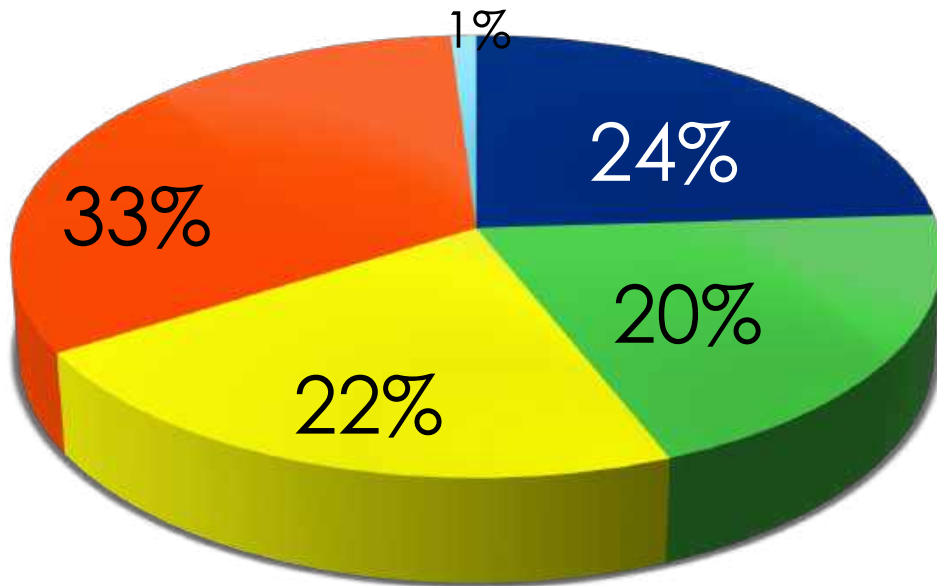


- TOTAL YES, TRUST
- TOTAL NO, DO NOT TRUST
- UNSURE/REFUSED

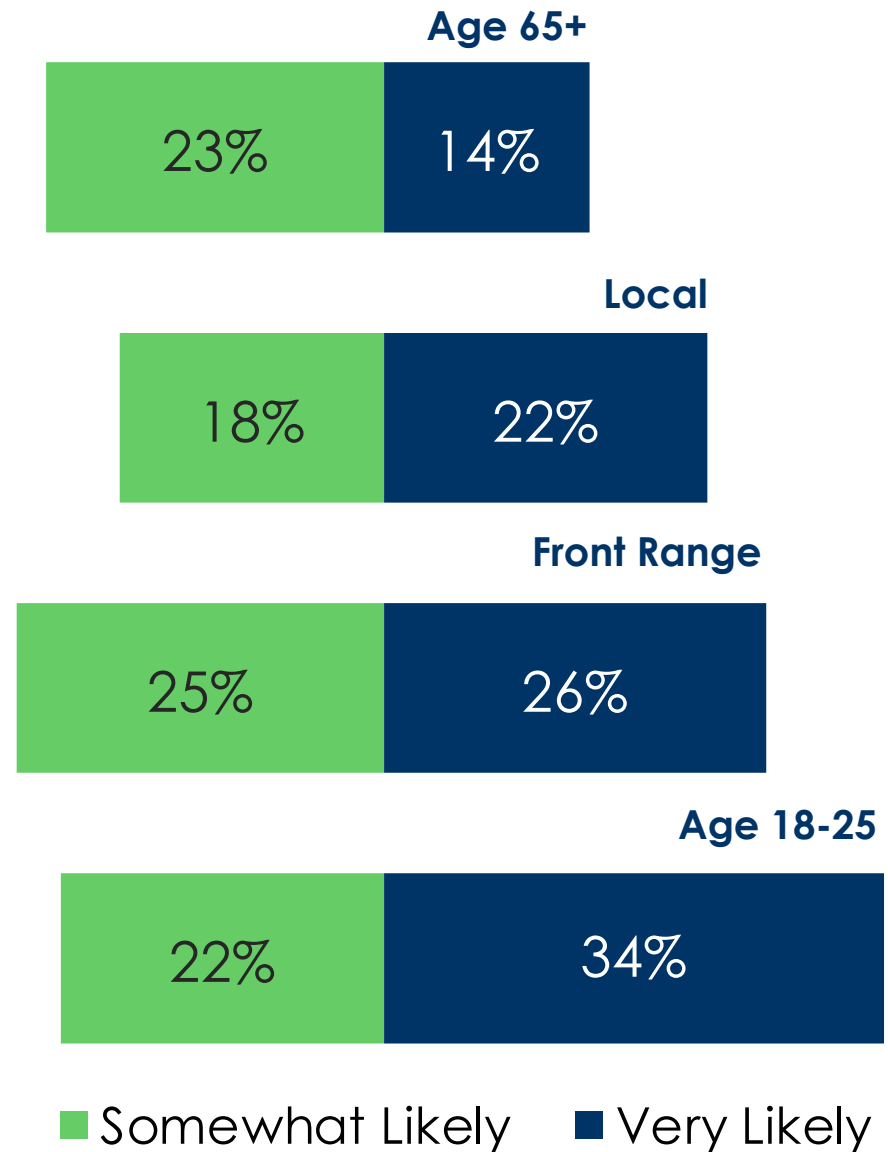
Strongly Trust	25%
Somewhat Trust	45%

There are no significant differences in opinion across major demographic and population subgroups.

# How likely are you eat lunch, dine and drink indoors at a ski resort when the weather turns cold and outside seating is not an option?



- VERY LIKELY
- SOMEWHAT LIKELY
- NOT TOO LIKELY
- NOT LIKELY AT ALL
- REFUSED

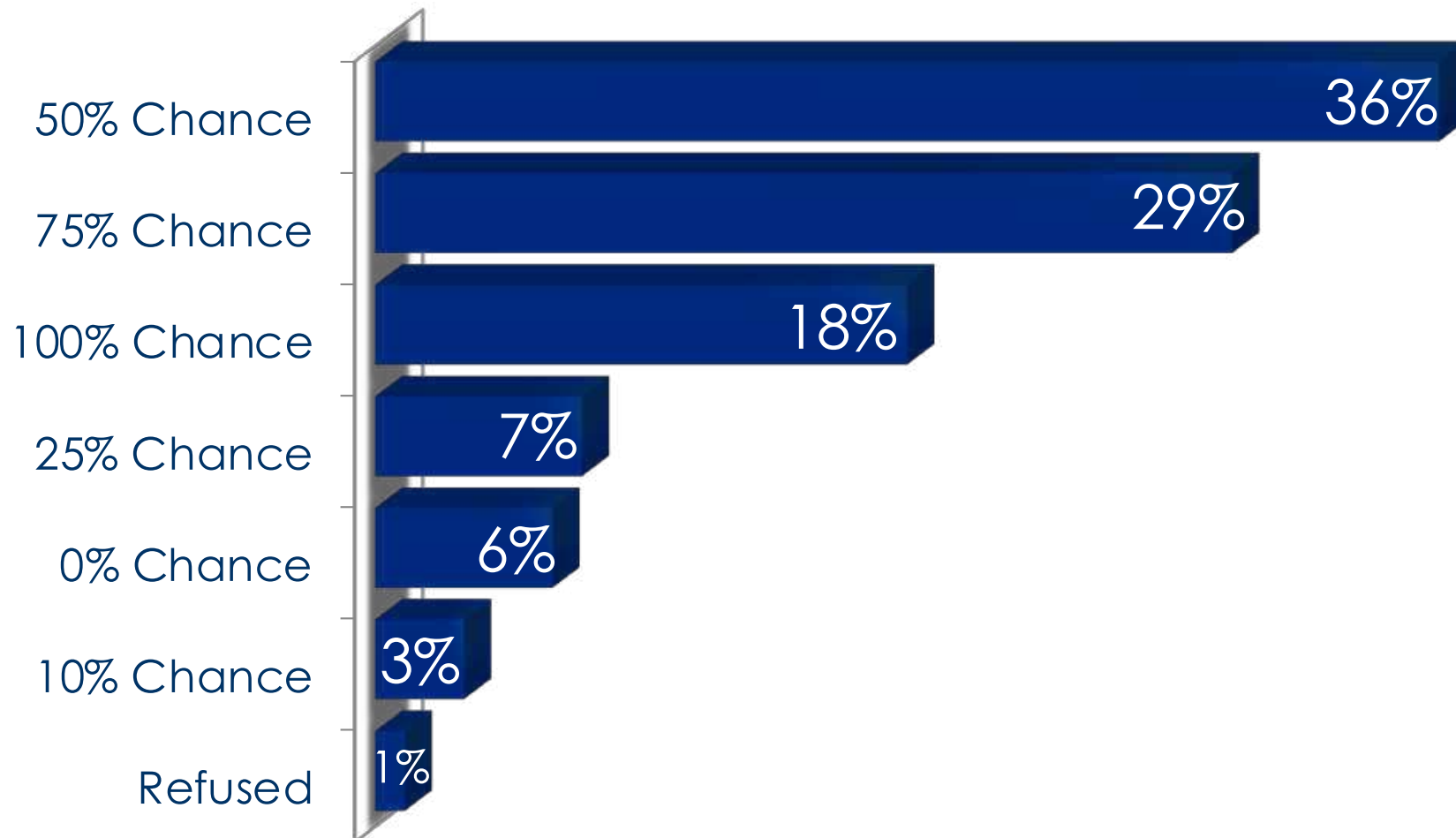




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OPINION OF THE CHANCES  
SKI AREAS WILL BE SHUTDOWN  
AT SOME POINT

*What do you think the chances are Colorado ski areas will be shut down at some point this season because of the coronavirus?*





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# GENERAL THOUGHTS ABOUT THE UPCOMING SEASON



## General Thoughts on the Upcoming Season

*“Do you have any general thoughts or concerns that you want to share about the upcoming season?”*

risk employees covid m ski resorts safety mountain want season live  
locals state think stay open open reservations people  
ski season will concerned ski pass go ski areas resorts  
come shut day need year make good keep able hope one safe  
close



# General Thoughts on the Upcoming Season

*“Do you have any general thoughts or concerns that you want to share about the upcoming season?”*

*“I’m nervous about skiing this season. I understand resorts are trying hard to make it safe, but I worry the number of people allowed to ski on a given day will not allow for a safe environment .”*

**-Female, 25-34, Clear Creek County**

## Major Themes

Keep Resorts Open

Prioritize Locals/Don’t Encourage Tourism

If Done Right, Can Still Be Safe

*“Snowboarding and skiing is already social distancing, you’re not right on each other besides the lift which you ride in the car with them to the resort so there’s no difference, let’s enjoy the winter sports!”*

**-Female, 18-25, Weld County**

*“Ski resorts, regardless of economic value, should prioritize their locals. Without their locals, ski resorts will fall apart. Yes, resorts run off tourists’ summer and winter, but locals lay the framework year-round. Keep their voice heard in decision making meetings.”*

**-Male, 18-25, Boulder County**

*“I am concerned about being a local near a ski resort as the resort plans to open. I am concerned Covid cases will rise in our community due to the influx of tourists coming to ski at the resort. This will put strain on our small hospital and community as a whole.”*

**-Female, 25-34, Pitkin County**

*“I love to ski. I love being outside. Encouraging tourism during COVID is stupid. I’d be more inclined to participate if it was locals only. I live in a small resort town. This winter is going to be a mess. I’m snowshoeing and Nordic skiing instead. Maybe back country skiing if I can get into an avalanche class.”*

**-Female, 45-54, Routt County**

*“The resorts should stay open. It is vital to our economy and our healthy lives. Stupid politicians need to stay out of it. Americans are free to make their own choices.”*

**-Male, 45-54, Cheyenne County**



David Flaherty | Courtney Sievers  
Ryan Winger



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