



2024

ANNUAL
OUTLOOK
ON RESORT
MARKETING

Presented by



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Introduction

Welcome to the first Annual Outlook on Resort Marketing, compiled and presented by MMGY Origin and SAM Magazine.

The goal of this report is to provide a better understanding of the resort marketing landscape, with the intent of supporting those working within marketing departments at ski areas across North America. We will be conducting this survey and distributing the results annually, allowing us to capture trends over time.

The survey was developed jointly by MMGY Origin and SAM, with feedback and suggestions from a handful of resort marketers. We welcome any feedback that will help improve the next survey and the report. The aim is for the report to be an indispensable resource, so we want to know what you want to know.

Please send feedback and suggestions to MJ Legault, mj@originoutside.com; and Dave Meeker, dave@saminfo.com.

Executive Summary

Resort size correlates with team size: As can be expected, smaller resorts tend to have fewer dedicated, year-round marketing staff, and larger resorts tend to have more. However, of the two resorts that reported 11-15 year-round staff, one was a resort in the West that sees 100,000-250,000 skier visits (the other sees 500,000-1 million visits, also in the West).

Seventy-nine percent of all resorts surveyed have in-house marketing and creative teams of five employees or fewer; 48% of all resorts have teams of two or smaller, which correlates with the survey sample of mostly small to midsize resorts.

Keeping the team status quo, for the most part: Eighty-one percent of all resorts surveyed plan to keep their in-house teams at about the same size for next year. For those planning to grow their in-house team, the most common areas of responsibility were content creation and social media, reflecting the importance of digital engagement.

Budget trends: Changes in year-over-year marketing budgets do not show a correlation to resort size, with resorts in all categories showing a mix of flat, increased, and decreased budgets.

Executive Summary

Across most resorts surveyed, there is a trend toward increased budget on digital media, as well as social media, with decreases in traditional media such as print, radio, and out-of-home.

Email marketing and social media platforms are commonly cited as the most productive channels by ad spend across all resorts surveyed.

Impacting climate change is not a priority: Strengthening ties to the local community emerged as the top social issue for the coming year in order of priority. Making a direct impact on climate change and sustainability ranked the lowest for respondents by a fairly wide margin. There could be a variety of reasons for this, including marketing leaders' focus on driving revenue and/or a lack of desire to wade into what has become a political topic.

Artificial intelligence isn't widely used, yet: Half of all respondents said they have used AI in the past year. Among those who report using it, there is an expectation of greater use in the coming year for things like writing content and image creation.

Pass partnerships: Eighty-four percent of all resorts surveyed have a reciprocal pass-holder benefit relationship, or participates in a multi-resort pass product.



METHODOLOGY & RESPONDENTS

Methodology & Respondents

Methodology:

The Resort Marketing Outlook survey was distributed to ski area marketers in early February 2024 via email. The survey allowed for full anonymity of respondents. A total of 68 industry professionals responded to the survey, providing valuable insights into the current landscape of resort marketing.

The survey questions asked for data regarding fiscal year 2024, which, given the seasonality of the ski business, can be a different calendar for different companies and organizations.

Respondent Summary:

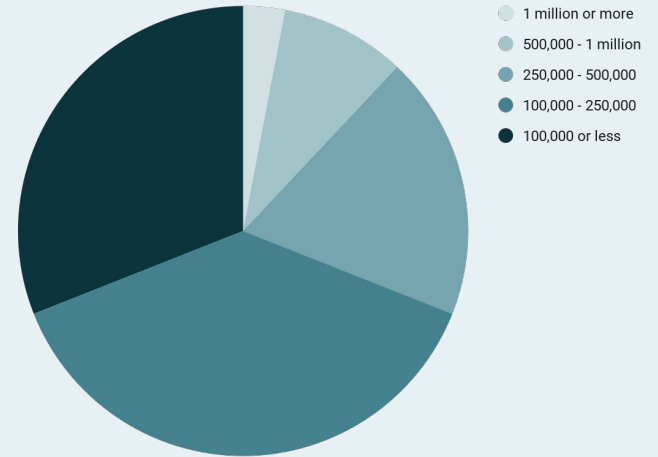
- **Total respondents:** 68
- **Geographic representation:** Respondents hailed from 21 different U.S. states and four Canadian provinces. Roughly 48% of respondents were from the Western U.S., 32% were from the Eastern U.S., 15% were from Canada, and 5% were from the Midwestern U.S.
- **Resort size:** For this report, skier visits were used as the metric for resort size. Respondents had five options to choose from: less than 100,000 skier visits, 100,000-250,000 skier visits, 250,000-500,000 skier visits, 500,000-1 million skier visits, and more than 1 million skier visits.
- **Resort skier visit range:** A significant portion of respondents, 69%, represented resorts with annual skier visits of 250,000 or less, providing insights into the marketing strategies of small to mid-sized resorts.
- **Title distribution:** Nearly 81% of respondents are a senior leader at their resort (marketing director, VP of marketing, CMO, president, general manager, owner) indicating a strong representation of decision-makers and key stakeholders in the survey pool.

An aerial night photograph of a mountain resort. The scene is dominated by snow-covered slopes and dark evergreen trees. Warm yellow lights from buildings and streetlights are scattered across the valley floor, creating a contrast with the cool blue tones of the twilight sky. In the background, rugged mountain peaks are visible, some with patches of snow. The overall atmosphere is serene and majestic.

RESORT SIZE & ROLE AT THE RESORT

Resort Size

Which of the following reflects your resort size?	Percentage
1 million or more annual skier visits	2.9%
500,000 - 1 million annual skier visits	8.8%
250,000 - 500,000 annual skier visits	19.1%
100,000 - 250,000 annual skier visits	38.2%
Less than 100,000 annual skier visits	30.9%



Note: The small sample of resorts with more than 500,000 skier visits may skew the findings within the report. However, we've chosen to keep these categories separate in order to begin building a benchmark basis for comparison year-over-year.

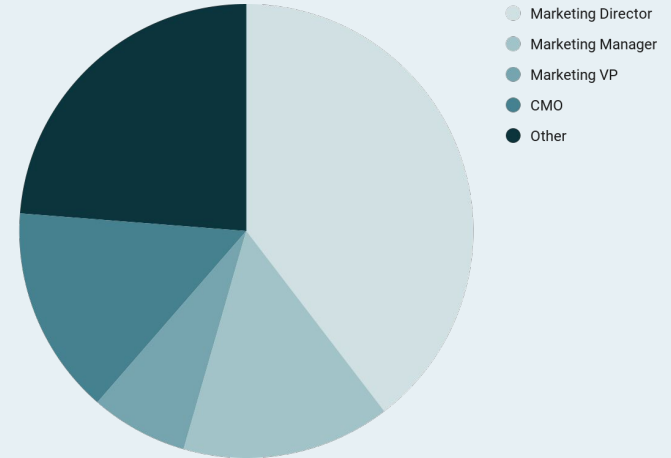
Role at the Resort

“Marketing Director” is the most common marketing-related role across all resorts.

Which of the following reflects your role at the resort?	Percentage
Marketing Director	39.7%
Other	23.5%
Marketing Manager	14.7%
CMO	14.7%
Marketing VP	7.4%

When stating “other,” these titles included:

- General Manager or President: 8
- Executive Director: 2
- Owner: 2
- Marketing Specialist: 1
- Operations: 1
- VP: 1
- Marketing & Community Relations Manager: 1



Role at the Resort

Based on the responses to this question, "Which of the following reflects your role at the resort?" here are the highlights by resort size:

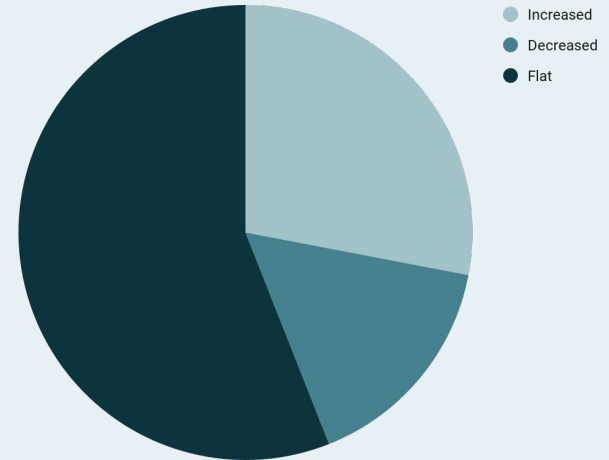
Resort Size	Highlight
Less than 100,000 annual skier visits	A diverse range of titles is observed, with 57.1% categorized as "Other," indicating a variety of roles not specified in the options, which is indicative of the many roles leaders at small ski areas perform. The remaining responses are spread across titles like marketing director, marketing manager, and CMO.
100,000 - 250,000 annual skier visits	42.3% are marketing directors, followed by 26.9% as marketing managers. The rest are distributed among titles such as CMO, marketing VP, and roles categorized as "Other."
250,000 - 500,000 annual skier visits	53.8% are marketing directors, followed by a significant representation of CMOs and marketing VPs, each constituting 15.4%. This is representative of the structure at higher-volume ski areas. Marketing managers and roles categorized as "Other" also make up 7.7% of responses, respectively.
500,000 - 1 million annual skier visits	The roles are more evenly distributed, with 33.3% being CMOs and marketing VPs each, and 16.7% being marketing managers and directors each.
More than 1 million annual skier visits	All respondents are marketing directors, indicating a more focused representation of roles in larger resorts.

BUDGET CHANGES YEAR-OVER-YEAR



Budget Changes Overview

Compared to FY 2023, which of the following statements best reflects your budgeting circumstances for FY 2024?	Percentage
My overall marketing budget has increased	27.9%
My overall marketing budget has decreased	16.2%
My overall marketing budget is flat	55.9%



Budget Changes by Resort Size

Resort Size	Insight
Less than 100,000 annual skier visits	61.9% reported their marketing budget is flat compared to FY 2023, 23.8% reported an increase, and 14.3% reported a decrease.
100,000 - 250,000 annual skier visits	Nearly 61.5% reported their marketing budget is flat compared to FY 2023, 26.9% reported their budget increased, and about 11.5% reported a decrease.
250,000 - 500,000 annual skier visits	38.5% reported their marketing budget is flat compared to FY 2023 while both 30.8% reported an increase and decrease in budgets. Fluctuations in budgets averaged 14%, with some resorts reporting increases/decreases as high as 20%.
500,000 - 1 million annual skier visits	50% reported their marketing budget is flat, and 50% reported an increase with an average budget increase of 12.5% and the highest increase cited as 15%. No resorts reported a budget decrease for the upcoming season.
More than 1 million annual skier visits	50% reported their marketing budget is flat, and 50% reported a decrease. None reported an increase.

Budget Changes

Flat budgets are the norm. Across various resort sizes and locations, a majority of marketing budgets were flat year-over-year.

- **Our take:** *This is not unusual and we're seeing a similar trend. Based on a 2024 Hubspot survey of 1,400+ marketers across all industries, 41% of respondents reported that their budget would increase. However, the majority of marketers (47%) expected their budgets to stay about the same.*

Source: <https://blog.hubspot.com/marketing/marketing-budget-percentage>

Specific Reasons for Budget Circumstances

Based on the responses to the question "Share specific reasons why your budget is up, down, or flat," here are the insights by resort size:

Resort Size	Insight
Less than 100,000 annual skier visits	Reasons for budget increases in this category include trying to access new markets, new demographics and expanding business, which leads to a broader scope in marketing efforts. Flat budget reasons include a lack of employees in the marketing department, a late start to the season and rising costs in general. Those who decreased moved away from agency work, had a horrible winter and one respondent is currently in receivership.
100,000 - 250,000 annual skier visits	Resorts in this category state a decrease due to weather and "hosedived skier visitation" leading them to rely more on organic and guerilla marketing and spending as little as possible. Those who mentioned increases did so to test new markets, to invest in branding and to put an added focus on summer marketing. Those who remain flat state that they have found the sweet spot and don't have capacity for more skiers or they are using similar plans and tactics as last year.
250,000 - 500,000 annual skier visits	Reasons for budget changes included changes to marketing strategy (increased budgets for earlier advertising and targeting broader markets or reallocating budget toward PR), previous seasons' impact (budget readjustments in line with revenues), economic factors (increase in operational costs leading to decreased marketing spend) and visitor management (slowing marketing efforts to reduce risk of over-tourism).
500,000 - 1 million annual skier visits	Reasons for budget changes include the cost of doing business, scale with budgeted growth expectations, and strategic initiatives. One respondent also mentioned focusing on drive markets due to the high cost of air travel.
More than 1 million annual skier visits	The mention of shifting some operational expenses into labor and then committing additional operational expenses into savings given business volumes was included in the responses.

Specific Reasons for Budget Circumstances

The following trends were identified based on responses to the open-ended question, “Share specific reasons why your budget is up, down, or flat.”

Weather Challenges: Several responses noted that their marketing budget was either flat or reduced due to uncontrollable weather conditions, including late starts to the season and poor snowfall, mostly at resorts in the West (U.S. and Canada) and Midwestern U.S.

- **Our take:** *Interestingly, resorts responded really differently to weather challenges with some drastically reducing their marketing initiatives as a result and some increasing their marketing efforts to further entice visitation.*

Revenue and Business Performance: With a late start to the season and limited snowfall, visitation suffered, revenues dropped and marketing budgets were frozen or reduced.

- **Our take:** *This is an indication that, in many cases, ski area marketing budgets are viewed as flexible. Even respondents who said they came off record seasons in 2022-23 had to cut back on spending due to a poor start in 2023-24.*

Operational Expenses: Shifts in operational expenses, including increased labor costs and efforts to maximize current budgets before increasing, were among the reasons for several respondents' flat or reduced budget.

- **Our take:** *This trend presents risks for ongoing marketing budget allocation as operational expenses will continue to rise. If resort managers don't allocate dedicated budgets, it's possible to see resorts with no funds for marketing themselves and relying solely on word of mouth, guerilla tactics, and reliance on loyal guests.*

Specific Reasons For Budget Circumstances

New Markets and Demographics: Efforts to access new markets, demographics, and broader scopes in marketing efforts were mentioned by a few respondents as reasons their marketing budgets increased.

- **Our take:** *Reaching new markets is always more expensive than marketing to regions where the brand has awareness already. Same goes for reaching a broader demographic or a specific niche audience that isn't already aware of the brand. Allocating increased budgets in these instances is critical.*

Digital Marketing: Several responses highlighted a shift toward more digital marketing strategies, including social media and digital ads, which have a tendency to be less expensive than traditional marketing channels like out-of-home and broadcast.

- **Our take:** *As digital becomes the way of the world, digital media prices are not likely to go down. Marketers would be wise to plan ahead assuming annual increases in these fees.*

Conservative Budgeting or Zero-Based Budgets: Some responses indicated a conservative approach to budgeting, with efforts to save or limit spending based on revenue or zero-based budgeting principles.

- **Our take:** *With the majority of small to midsize resorts reporting either flat budgets or budget increases during the 2023-24 season, despite weather challenges, there is an indication that competition for small to midsize resorts is becoming more fierce now that the skier bump seen in Covid years has tapered off.*



Share specific reasons why your budget is up, down or flat.

This season has been challenging to say the least, almost entirely because of weather out of our control. We are relying on organic marketing and guerilla marketing and spending as little as possible.

- Unknown location, 100k-250k skier visits

The major reason for the increase was to start our winter advertising a little sooner in the season and to reach out to a slightly larger market than we have traditionally focused on.

- East, 250k-500k skier visits

We're flat because we are lacking employees in the marketing department.

- Midwest, <100k skier visits

Increase of budget as we're trying to access new markets, new demographics and a broader scope in efforts.

- British Columbia, <100k skier visits



ANNUAL MARKETING BUDGET PRIORITIZATION

Budget Percentage

Based on the responses to the question "What Percentage of Annual Revenue is Allocated to Your Marketing Budget?" here are the insights:

Resort Size	Insight
Less than 100,000 annual skier visits	The responses here varied from 1% to 15% of annual revenue spent on marketing. The average was 4%.
100,000 - 250,000 annual skier visits	The responses varied from 1% to 10% with an average of 4.56% of annual revenue spent on marketing.
250,000 - 500,000 annual skier visits	The average marketing budget as it related to annual revenue for resorts between 250,000 - 500,000 annual skier visits is 3%. Respondents answered as high as 12% with the majority reporting 1% - 4%.
500,000 - 1 million annual skier visits	The average marketing budget as it related to annual revenue is 3.5% for this group, with the highest 7.5% and the lowest 1%.
More than 1 million annual skier visits	The average was 1.3%

Annual Revenue Allocated to Marketing

Respondents reported marketing budgets of between 0.5-15% of annual revenue, with an average of roughly 4% of annual revenue going toward marketing—double that of the 2022-23 national average reported in the NSAA Economic Analysis, and equal to the national average from 2013-14.

Our take: *According to recent Hubspot surveys, the amount of revenue businesses allocate to marketing has grown over the last few years, with the average at 9.1% of overall company revenue in 2023 compared to just 6.4% in 2021. Decisions related to marketing budget allocation remain largely industry specific. As a general rule of thumb, B2B companies should spend between 2-5% of their revenue on marketing, and B2C companies sit higher at 5-10%.*

Based on a survey of CMOs at American companies, consumer packaged goods companies spend the most with on average 25.19% of annual sales on marketing while banking/finance/insurance spend 9.49% (Source: <https://www.statista.com/statistics/742988/marketing-budget-share-category-usa/>)

Annual Marketing Budget Prioritization

Here are some insights based on the responses to the question "Have your budget allocation priorities changed compared to previous years, and if so, why?"

Resort Size	Insight
Less than 100,000 annual skier visits	Only 50% of respondents answered "Yes" to this question. Those who said yes did so for three major reasons: a shift from traditional to digital media, a shift for seasonal marketing and focus on summer, and organizational changes (new ownership, new branding, new seasonal offerings).
100,000 - 250,000 annual skier visits	73.33% answered "Yes" to this question and cited a shift to digital and social media. Some in this category were focusing on inbound marketing programs, email, web, and social with paid boosts.
250,000 - 500,000 annual skier visits	Overwhelming majority in this category cited a change from more traditional, OOO tactics to digitally-focused tactics that provide tangible returns. Some cited social media specifically with the goal to capitalize on trends.
500,000 - 1 million annual skier visits	An emphasis on digital advertising and product advertising were mentioned among these respondents.
More than 1 million annual skier visits	Like other categories, shifting into a more data-driven approach with a focus on paid media was mentioned

Marketing Budget Prioritization

Here are the main themes:

Increased Emphasis on Digital Marketing and Decreased Spending on Traditional

Media: A common theme was the reduction in spending on traditional media such as print, radio, and out-of-home advertising in favor of digital marketing, including social media, digital ads, and digital tracking capabilities.

- **Our take:** This shift is seen across all industries and is often attributed to the declining effectiveness of traditional media and the desire for more measurable and targeted digital campaigns. *Marketers love the ability to track and measure the effectiveness of digital campaigns more easily.*

Increased Focus on Social Media: Several respondents highlighted an increased focus on social media marketing. This reflects a broader trend in the industry toward leveraging social platforms for engagement and brand awareness.

- **Our take:** Respondents cited social media as one of the most effective channels to reach their target audience.

Budget Priority Shifts & Why

Brand Development and Creative Development: Some respondents mentioned allocating more budget toward brand development and creative development. This reflects a focus on building a strong brand identity and creating compelling marketing content.

- **Our take:** With the homogenization of resort amenities and experiences, some resorts are turning to brand strategy and a strong brand campaign as a way to further differentiate themselves from competition. While “brand awareness campaigns” can’t always be linked to ROI, they are increasingly used to build emotional connections with guests and prospects.

Summer Operations Focus: Some respondents mentioned a stronger marketing push for summer operations, aiming to offset declines in winter business or capitalize on new opportunities.

- **Our take:** With the vast majority of resort social media followers being winter guests, much more time has to be spent to reach a new summer audience on social media. In addition, all media tends to be more expensive in the summer season as there is more competition. This is true of traditional media but also search and some paid digital.

” Have your budget allocation priorities changed compared to previous years, and if so, why?

Absolutely. This is not a normal year by any means. I have slashed my budget and rely on content and social media to do as much heavy lifting as possible.

— **Unknown location, 100k-250k skier visits**

Yes, allocating more into digital and less in traditional. Also including more spend for brand development and creative development.

— **PNW, 100k-250k skier visits**

Shifting our allocation from Brand Ads to more Product Ads. With poor snow conditions, the goal for the season has shifted from splitting up brand ads and product ads to having our marketing spend be more focused on product ads to drive revenue.

— **Rockies, 500k-1 million skier visits**

We have shifted spend away from radio and OOO: Ownership likes to see a tangible return that digital provides.

— **East, 250k-500k skier visits**

” Have your budget allocation priorities changed compared to previous years, and if so, why?

Yes. We have found we need to shift to a stronger marketing push for our summer operations because ridership is still down and not at a strong enough point for sustainability.

— PNW, less than <100k skier visits

Heaviest focus the past two years for inbound marketing programs, email, web, and social with paid boosts.

— East, 100k-250k skier visits

Direct mail is our most important. No waste. Goes right to people we know ski.

— Midwest, less than <100k skier visits

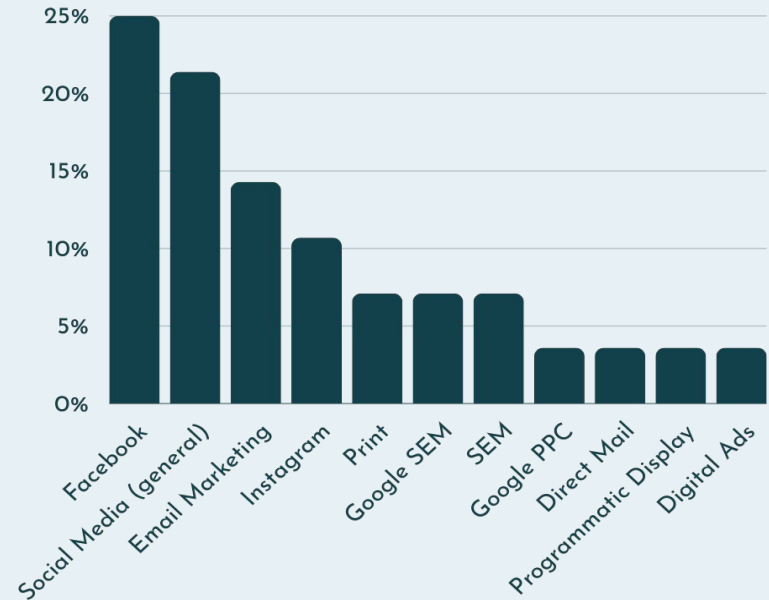


MOST PRODUCTIVE CHANNEL BY RETURN ON AD SPEND

Most Productive Channel By Return on Ad Spend

Note: This was an open-ended question. The percentages reflect the number of responses that named the channel as a percentage of the total number of responses.

Channel	Percentage
Facebook	25%
Social Media (general)	21.4%
Email Marketing	14.3%
Instagram	10.7%
Print	7.1%
Google SEM	7.1%
SEM	7.1%
Google PPC	3.6%
Direct Mail	3.6%
Programmatic Display	3.6%
Digital Ads	3.6%



Most Productive Channel By Return on Ad Spend

Resort Size	Most productive channels by return on ad spend
Less than 100,000 annual skier visits	Social Media (including Facebook and Instagram): 8 responses Facebook: 4 responses Instagram: 1 response General Social Media: 3 responses Direct Mail: 2 responses Email Marketing: 2 responses SEM/Google PPC: 2 responses
100,000 - 250,000 annual skier visits	Social Media (including Facebook and Instagram): 12 responses Facebook: 7 responses Instagram: 2 responses General Social Media: 3 responses Email Marketing: 4 responses Google Ads / SEM: 5 responses Digital Advertising: 3 responses Print: 1 response
250,000 - 500,000 annual skier visits	Social media, paid search (Google ads), digital banner ads
500,000 - 1 million annual skier visits	Email, programmatic display, PPC ads
More than 1 million annual skier visits	Paid social

Most Productive Channel By Return on Ad Spend

Our take: Let's begin with a definition: While ROI (return on investment) is the best measure of success for digital marketing campaigns, ROAS (return on ad spend) is a close second. ROAS interprets a marketing or advertising campaign's return in the context of a single dollar, e.g. "For every dollar you spend, you make \$1.25 back." The ease of understanding that ROAS offers is what makes it popular among CMOs. $ROAS = \frac{\text{Total Revenue from Campaign}}{\text{Campaign Spend}}$

The value you place on the ROAS measurement will depend on your brand's advertising goals. For example, if you want to build brand recognition, awareness, and visibility, a low ROAS isn't necessarily bad news. But if you're focused on generating sales, it's essential.

Overall, the survey data shows Facebook being a standout performer in terms of return on ad spend. When we compare this with industry benchmarks,

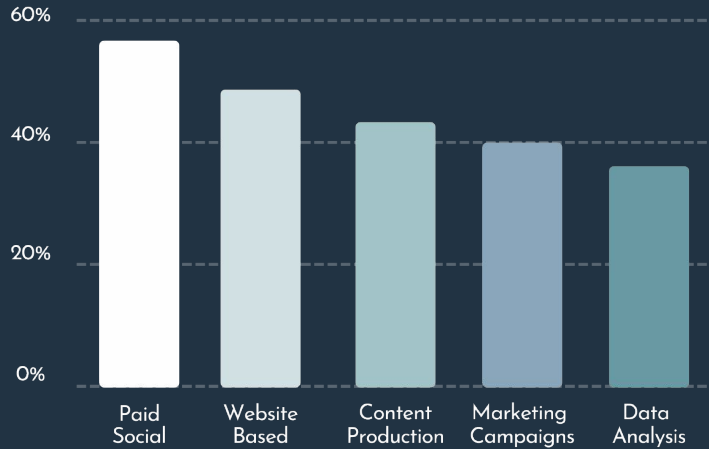
Email marketing was brought up by several resorts as a powerful channel.

SPENDING INCREASES & DECREASES

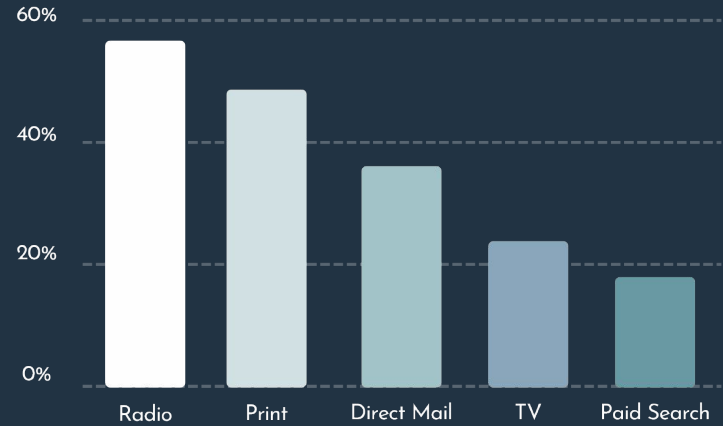


When asked which areas are slated for spending increases and decreases, we saw the following:

Slated for Spending Increases (Top 5) FY 2024



Slated for Spending Decreases (Top 5) FY 2024



Spending Increases

Resort Size	Insight
Less than 100,000 annual skier visits	<p>The highest planned increases in spending are for Websites (66.7%), Marketing Campaigns (55.6%), Content Production (50%), and Paid Social (50%).</p> <p>Moderate increases are planned for Brand Strategy (44.4%), Summer-specific Marketing (38.9%), and Paid Search (33.3%).</p> <p>Other areas with planned increases include Video Advertising (27.8%), Media Planning (27.8%), Platform Implementation (27.8%), and Data Analytics (27.8%).</p> <p>Lower planned increases are seen in Online Display (16.7%), Print (16.7%), Direct Mail (16.7%), TV (22.2%), and Custom Applications (11.1%).</p> <p>Minimal increases are planned for Radio (5.6%).</p>
100,000 - 250,000 annual skier visits	<p>The highest planned increases in spending are for Paid Social (60.9%), Websites (52.2%), and Content Production (47.8%).</p> <p>Moderate increases are planned for Marketing Campaigns (39.1%), Media Planning (39.1%), Data Analytics (34.8%), Online Display (34.8%), and Paid Search (34.8%).</p> <p>Other areas with planned increases include Platform Implementation (30.4%), Brand Strategy (26.1%), Video Advertising (26.1%), and Summer-specific Marketing (26.1%).</p> <p>Lower planned increases are seen in TV (13.0%), Radio (13.0%), Direct Mail (17.4%), and Print (8.7%).</p> <p>Minimal increases are planned for Plans for Media Increases (8.7%).</p>

Spending Increases (continued)

Resort Size	Insight
250,000 - 500,000 annual skier visits	Top tactics slated for spending increases are paid social (60%) website enhancements (50%), data/analytics (40%). 30% of respondents indicate that they are also looking to invest more into paid search, brand strategy, content production, media plan development, video advertising (excluding social) and summer-specific marketing.
500,000 - 1 million annual skier visits	Top tactics slated for spending increases are platform implementations (Ecom, CMS) (83.3%), data analytics/research (66.7%) and marketing campaign development/execution (66.7%). 50% of respondents also indicated that website enhancements, brand strategy, paid search and paid social are also slated for increases.
More than 1 million annual skier visits	Resorts in this category are planning to increase spending in data analytics/research, platform implementations, media planning/buying, brand strategy and development, content production, and paid social.

Spending Decreases

Resort Size	Categories most likely slated for spending decreases (% of respondents in each size category)
Less than 100,000 annual skier visits	<p>The highest planned decreases in spending are for Radio (53.3%) and Print (46.7%).</p> <p>Significant decreases are planned for Direct Mail (40%), Paid Search (26.7%), and TV (26.7%).</p> <p>Moderate decreases are planned for Plans for Media Decreases (20%) and Online Display (20%).</p> <p>Other areas with planned decreases include Custom Applications (13.3%), Video Advertising (13.3%), Paid Social (13.3%), and Summer-specific Marketing (13.3%).</p> <p>Lower planned decreases are seen in Platform Implementation (6.7%), Web-related Projects (6.7%), and Content Production (6.7%).</p>
100,000 - 250,000 annual skier visits	<p>The highest planned decreases in spending are for Print (52.6%) and Radio (52.6%).</p> <p>Moderate decreases are planned for Brand Strategy (26.3%), Direct Mail (26.3%), TV (21.1%), and Web-related Projects (21.1%).</p> <p>Other areas with planned decreases include Data Analytics (15.8%), Marketing Campaigns (15.8%), Platform Implementation (15.8%), Media Planning (15.8%), and Paid Search (10.5%).</p> <p>Lower planned decreases are seen in Websites (10.5%), Plans for Media Decreases (10.5%), Content Production (5.3%), Online Display (5.3%), Video Advertising (5.3%), Paid Social (5.3%), Custom Applications (5.3%), Summer-specific Marketing (5.3%), and Other (5.3%).</p>

Spending Decreases (continued)

Resort Size	Categories most likely slated for spending decreases (% of respondents in each size category)
250,000 - 500,000 annual skier visits	The highest planned decreases in spending are for Radio (66.7%) and Print (55.6%). Significant decreases are planned for TV, Direct Mail, Content Production, Media Buying/Planning, Platform Implementations (like Ecom and CMS), Marketing Campaign Development and Research (22%).
500,000 - 1 million annual skier visits	The highest planned decreases in spending are for TV, radio, direct mail (60%). Significant decreases are also planned for video advertising excluding social (40%).
More than 1 million annual skier visits	100% of respondents indicated that summer-specific marketing, paid search, print, radio, direct mail and online display excluding social were all cited for decreases.

An aerial, high-angle photograph of a snowy mountain slope. Several ski lift gondolas are visible, suspended from cables that run diagonally across the frame. The snow is bright white, and the shadows of the trees and gondolas are cast onto it. The overall color palette is a cool, monochromatic blue-grey. The text 'BIGGEST CONCERNS' is overlaid in large, white, bold, sans-serif capital letters on the left side of the image.

BIGGEST CONCERNS

Biggest Concerns

Resort Size	Insight
Less than 100,000 annual skier visits	<p>The responses reflect a broad range of challenges, from technological and economic issues to consumer behavior and operational constraints.</p> <p>Algorithm Changes: Multiple responses indicate concerns about how algorithm changes and privacy issues affect advertising and tracking.</p> <p>Consumer Trends: Decreased consumer spending on leisure and changes in spending habits are noted.</p> <p>Economic Concerns: The potential impact of economic downturns and high costs on membership and marketing budgets are significant concerns.</p> <p>Operational Challenges: Issues such as inconsistent weather, bad winter impacts, and construction affecting capacity are influencing marketing strategies.</p> <p>Staffing: Staffing challenges and creative planning are also highlighted as areas of concern.</p>
100,000 - 250,000 annual skier visits	<p>These responses highlight a blend of market-specific challenges, technological hurdles, economic pressures, and operational constraints.</p> <p>Regional Market Dynamics: The local market competitiveness and consumer convenience play a major role.</p> <p>Technological Challenges: Issues with algorithms, AI, and tracking systems are prominent.</p> <p>Consumer Trends: Changes in consumer behavior, global warming effects, and decreased skier visits are major concerns.</p> <p>Economic Pressures: Inflation and reduced disposable income are affecting budgets and spending.</p> <p>Operational Constraints: Small team size and staffing issues impact the ability to respond to market and</p>

Biggest Concerns (continued)

Resort Size	Categories most likely slated for spending decreases
250,000 - 500,000 annual skier visits	<p>The responses reflect a broad range of challenges, from technological and economic issues to operational constraints.</p> <p>Algorithm changes: Changes to GA4 is a top concern for nearly all respondents, citing concerns about how algorithm changes and privacy issues affect advertising and tracking.</p> <p>Weather/climate challenges: Lack of early season snow and/or inconsistent weather throughout the season and increasingly warmer winters are a top concern for many respondents.</p> <p>Staffing: Hiring and maintaining key positions for winter operations is a concern among respondents.</p> <p>Evolving AI landscape: Concerns around keeping up with technology changes involving AI were cited by some respondents</p>
500,000 - 1 million annual skier visits	<p>Consumer Trends: Changes in consumer behavior, and decreased skier visits and a rise in industry prices are major concerns by all respondents.</p> <p>Multi-pass products: Concern around the expansion/proliferation of multi-pass products was cited as a concern.</p>
More than 1 million annual skier visits	<p>Algorithm changes: Changes to GA4 is a top concern for nearly all respondents, citing concerns about how algorithm changes and privacy issues affect advertising and tracking.</p> <p>Staffing: The ability to hire and develop high-performing staff is a concern among respondents.</p> <p>Effective marketing: Concerns around building a brand that breaks through the noise and optimizing marketing efforts with a data-driven approach were top of mind.</p>

Biggest Concerns

Marketers were asked the open-ended question of what concerns them the most, from a marketing perspective, in FY 2024. Note: The question offered examples for potential concerns, including algorithmic changes affecting advertising, staffing, and consumer trends. These emerged as top concerns, but it's not clear if the examples prompted respondents to mention them.

It's no surprise that economic factors such as inflation, the spending power of consumers, and the potential impact of a recession are key concerns. Resort operators won't be surprised to hear that recruiting and retaining skilled staff is a common concern.

Our take: *The transition to Google Analytics 4 (GA4) has been a major concern for many marketers. The loss of historical data from Universal Analytics and the limitations in future data collection have created significant challenges. The new GA4 interface, with its updated metrics and naming conventions, has left many marketers feeling overwhelmed. Long-established data points are now either missing or calculated differently, complicating the process of accessing and analyzing familiar insights. We agree, this can appear daunting when you've used this platform for so long, however, Google has new resources available for us in the [Google analytics Academy](#).*

Biggest Concerns (our take continued)

Teams shared increasing concern surrounding privacy changes that impact tracking capabilities. Regulations like GDPR and CCPA, along with browser updates phasing out third-party cookies are making it harder to collect detailed user data, and there are concerns about maintaining the same level of insight and effectiveness in their advertising efforts. Where possible, lean on those agency partners and peers who are dedicating the time to keeping up to speed with the latest updates. It's a moving target and one we cannot miss.

With many resorts citing a difficult weather year during the 2023-24 season, we are noting an uptick in environmental comms planning to staff marketing teams with the messaging needed to facilitate consumer trip planning and decision-making during poor weather periods.



What concerns you the most?

We are generally concerned about keeping up with the consumer trends on social media as we are a very small team and it takes a lot of time to follow trends and create relevant content.

— West, 100k-250k skier visits

Consumer trends - how can we keep skiers interested in skiing? In our world we're missing a generation of skiers at our small area, we need to plant seeds in schools, get night skiing back into something as it died off as this mtn decayed.

— East, <100k skier visits

Google Analytics 4 tracking has been a mess since Google rolled it out. We are not yet confident in our analytics numbers because our setup is not working properly.

— West, 100k-250k skier visits

Changes to and the evolution of technology, including but not limited to algorithmic changes and the ever-growing landscape of AI are things that I think about a lot. The pay-to-play aspects of social media are becoming more prevalent and for resorts with smaller marketing budgets who rely on organic engagement, that's problematic.

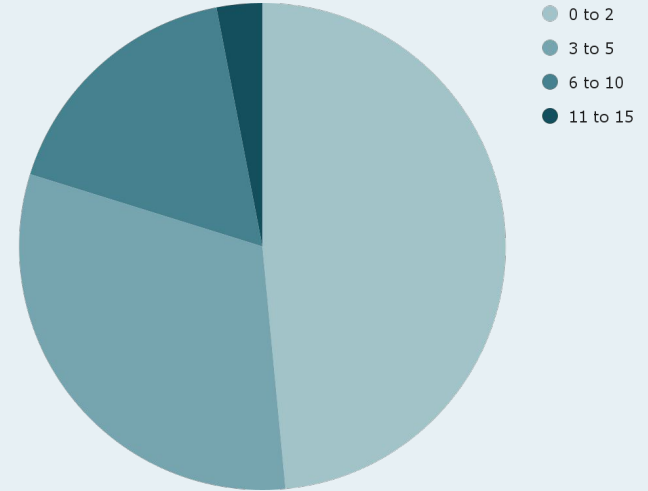
— East, 250k-500k skier visits

A person is skiing down a snowy slope, kicking up a cloud of snow. The background is a dark, starry sky. The text "STAFFING & SIZE OF IN-HOUSE TEAM" is overlaid in white, bold, sans-serif font, underlined.

STAFFING & SIZE OF IN-HOUSE TEAM

Size of In-House Team

Which reflects the size of your resort's year-round in-house marketing/creative team?	Percentage
0 to 2	48.4%
3 to 5	31.3%
6 to 10	17.2%
11 to 15	3.1%



Roles in Resort Marketing Teams

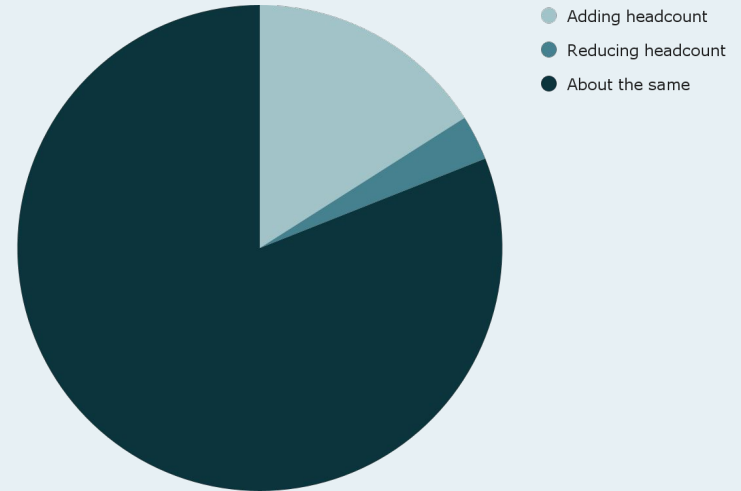
Resort Size	Insight
Less than 100,000 annual skier visits	<p>Social Media Manager is the most common role, included by 57.1% of teams.</p> <p>Graphic Designer, Director of Marketing, and Marketing Manager are also common positions, each with around 42.9% to 47.6% inclusion.</p> <p>Marketing Coordinator and Videographer are noted by 38.1% and 33.3% of teams, respectively.</p> <p>Communications roles are represented by 19%, with other roles such as Interactive Marketing and Merchandising appearing less frequently.</p>
100,000 - 250,000 annual skier visits	<p>Marketing Manager is the most common role in-house, with 72% of teams including this position. Director of Marketing follows closely with 68%.</p> <p>Other notable roles include Videographer, Graphic Designer, and Social Media Manager, each included by around 48-52% of teams.</p> <p>Communications roles appear in 20% of teams, with other roles like Snow Reporter (40%) and Interactive Marketing (12%) also noted.</p>

Roles in Resort Marketing Teams (continued)

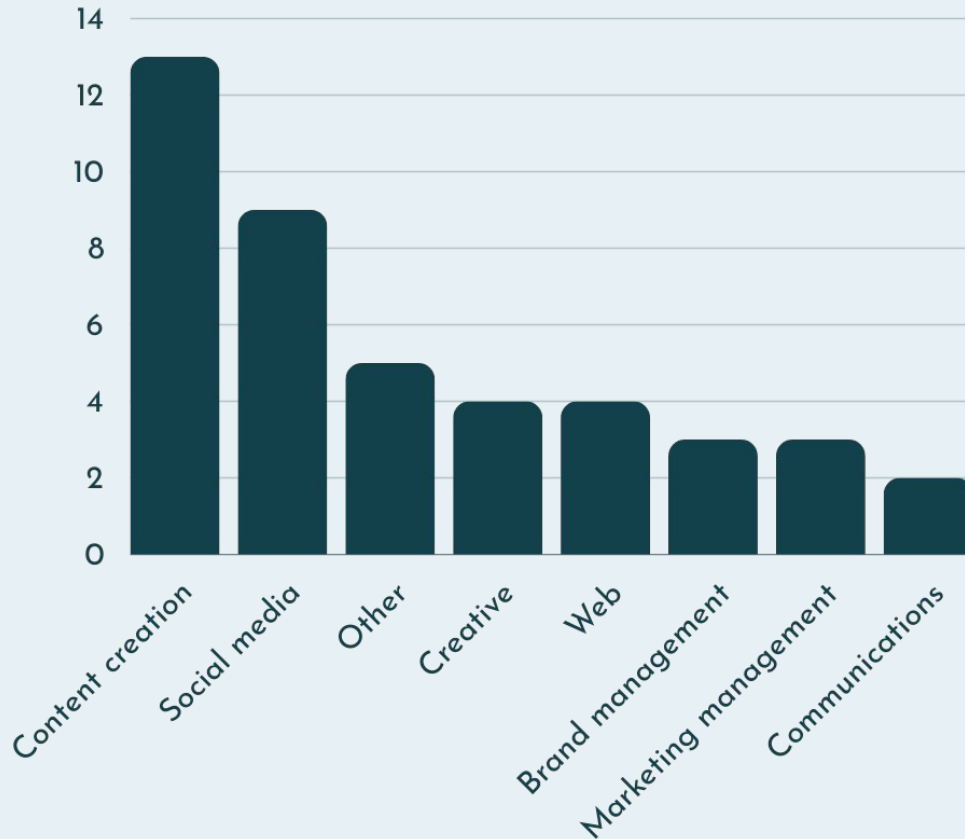
Resort Size	Insight
250,000 - 500,000 annual skier visits	<p>Videographer/Photographer was the most common role, noted by 63.6% of resorts in this category.</p> <p>Snow Reporter role was included in 45% of teams.</p> <p>VP of Marketing role is noted by 18.2% of respondents.</p>
500,000 - 1 million annual skier visits	<p>Overall, 66.6% of resorts in this category have a marketing team of 6-10 employees.</p> <p>Social Media Manager is the most common role, included by 100% of teams.</p> <p>Director of Marketing and Marketing Manager were also common positions, each with 83.3% inclusion.</p> <p>Chief Marketing Officer and VP of Marketing were noted as roles by 50% of respondents.</p>
More than 1 million annual skier visits	<p>Chief Marketing Officer, VP of Marketing, Director of Marketing, Marketing Manager, Graphic Designer, Social Media Manager, and Communications/PR staff all have 100% inclusion in this resort category.</p> <p>There is a strong focus on leadership roles and a comprehensive approach to marketing and creative work.</p>

Staffing Plans for Next Year

Which of these reflect your staffing plans for FY 2024?	Percentage
Adding headcount to in-house team	15.9%
Reducing headcount for in-house team	3.2%
About the same	81%



Where Are You Looking to Grow Your Team?



***Respondents were asked to choose as many as apply.**

When stating "other," these titles included:

Event Staff, Events Coordinator,
Events and Communications as well as Public Relations

Where Are You Looking to Grow Your Team?

Resort Size	Insight
Less than 100,000 annual skier visits	<p>The most significant growth area is Content Creation, with 70% of responses indicating this as a priority.</p> <p>Social Media follows with 50%, reflecting a strong focus on enhancing social media capabilities.</p> <p>About 20% of respondents said they plan to add roles in either Brand Management or Web.</p> <p>Communication, Marketing Manager, and Creative roles are seen as less critical but still relevant, each with 10% of responses.</p> <p>New roles for Events and Public Relations were each noted by one respondent.</p>
100,000 - 250,000 annual skier visits	<p>Content Creation is the top area for growth, with 44.4% of respondents indicating a need to expand this role.</p> <p>Social Media is also a significant focus, with 33.3% aiming to add staff for this area of responsibility.</p> <p>Marketing Manager and Creative roles are each identified for growth by 22.2% of respondents.</p> <p>Brand Management and Web are less prioritized, each at 11.1%.</p> <p>Event Staff/Coordination is noted by 33.3% under the "Other" category, indicating the growing importance of events for ski areas of this size.</p>
250,000 - 500,000 annual skier visits	<p>18.2% of resorts in this category are also looking to add staff for the coming season in areas such as Content Creation, Social Media, Creative, and Communications.</p>
500,000 - 1 million annual skier visits	<p>Resorts looking to add staff are focusing on Content Creation and Web roles.</p>

SOCIAL JUSTICE - WHAT'S MOST IMPORTANT



Social Justice - What's Most Important?

Rank the following in order of priority	Overall Rank	Rank Distribution	Score	No. of Rankings
Strengthening relationships with local community	1		214	63
Investing in employee skills development to fill talent shortages	2		202	60
Supporting the emotional and physical wellbeing of staff	3		197	58
Creating a culture of inclusion and belonging	4		194	58
Making a direct impact on climate change and the sustainability of our planet	5		106	56



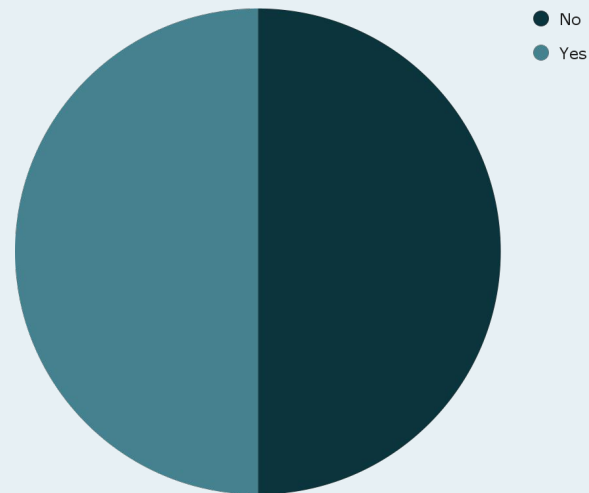
Lowest — Highest



IS YOUR RESORT USING AI?

Is Your Resort Using AI?

Is your resort using AI?	Percentage
No	50%
Yes	50%



Is Your Resort Using AI?

Resort Size	Insight
Less than 100,000 annual skier visits	More than 71% of respondents said they are not using AI right now. Half of those that are using it are located in the Southwest, and most current users say they use it to help write content.
100,000 - 250,000 annual skier visits	Roughly 62% of respondents are using AI. Most are using it to help write content (copywriting, social posts), and some leverage it for chatbots and image creation.
250,000 - 500,000 annual skier visits	54.5% of respondents in this category are currently using AI in their resort operations. Majority of respondents are using AI to facilitate copywriting for blogs, social, emails, and other marketing tactics while one respondent mentioned the use of AI for lift efficiency.
500,000 - 1 million annual skier visits	66.7% of respondents in this category are using AI. Respondents indicated that the uses included chatbots facilitation (answering customer service questions), copywriting, and research.
More than 1 million annual skier visits	50% of respondents are currently using AI (for minor copywriting needs) while 50% have not implemented the use of it internally.



Is Your Resort Using AI?

We are simply crossing into the use of AI. Primarily right now we are using it for email and creative text content, along with some photography elements. Nothing too complex but we do anticipate focusing in on learning more about the opportunities AI has this off-season.

— Midwest, 100k-250k skier visits

Most marketers at small resorts work alone and in a silo. AI provides a great tool for enhancing and improving writing, brainstorming, and filling in the muddy spots on the mountain with generative AI snow.

— Southwest, <100k skier visits

We use Chat GPT for helping with emails, blogs, and captions for our media and content. We also use AI to help see where our focuses need to lie based on what our reviews are saying and how we can function better as a team.

— East, <100k skier visits

Mostly right now it helps to write blogs, online review responses, and social media captions. But I plan to increase its capabilities soon in terms of analyzing data and website metrics.

— East, 250k-500k skier visits

Do You Plan to Utilize AI More in 2024?

Resort Size	Insight
Less than 100,000 annual skier visits	With this group of resorts, a majority of respondents either have no current plans or are unsure about AI's role in marketing. One respondent is planning on exploring digital and social media AI. There is a significant level of uncertainty or lack of clarity regarding AI's relevance to their industry.
100,000 - 250,000 annual skier visits	A majority of respondents have no current plans to use AI in FY 2024. A smaller subset is exploring or interested in AI for specific areas like content creation, data analysis, social media, and SEO.
250,000 - 500,000 annual skier visits	A majority of respondents have no current plans to use AI in FY 2024
500,000 - 1 million annual skier visits	N/A
More than 1 million annual skier visits	There is an interest in exploring AI further in FY 2024, particularly for minor copywriting needs.

About half of respondents said no, they have no plans to do more with AI in the future. Some comments included, "We will play with it a bit but not really planning on implementing" or "no clue how this ties into our industry, paying attention."

Do You Plan to Utilize AI More in 2024?

Larger resorts (500,000 or more skier visits) are more likely to be using AI, particularly for chatbots and copywriting tasks. Midsized resorts (250,000-500,000 visits) show an interest in AI, particularly for customer service tasks. Smaller resorts (less than 100,000 and 100,000-250,000 visits) are less likely to use AI.

- **Our take:** *For small marketing teams, efficiency is paramount. Cutting down on repetitive tasks and maximizing productivity is essential. AI serves as a vital tool to help avoid the need for additional hires and prevent team overload. We've observed the best results when resorts identify one passionate employee to champion AI implementation across departments. Success often stems from this individual being slightly more senior, with the authority to drive significant changes*

” Do you plan to utilize AI more in 2024?

Although the time-saving elements of AI can be beneficial, I do not plan to use AI to create content, posts, responses to customers, etc. We pride ourselves on being mom & pop through and through, and retaining that personal element is key. We have yet to explore AI in terms of data collection, and that is something we may start to look into.

— Unknown location, 100k-250k skier visits

No. IT forbids it. (and justifiably so, based on conversations with experts)

— East, 250k-500k skier visits

An aerial photograph of a dense forest of evergreen trees covered in snow. The ground is also covered in snow, and there are several winding tracks visible, likely from skis or snowshoes. The overall color palette is a monochromatic blue and white, giving it a cool, winter feel.

MARKETING LESSONS & MISSTEPS

Marketing Lessons & Missteps

Respondents were asked, “What marketing missteps have you learned the most from over the past year?” Their answers were interesting, and revealing, which is why we share most of them here.

- “Spending more does not always translate to customer loyalty. Creating a solid brand and customer experience will make up for that spending hand over fist.”
- “Not getting out in front of the season with aggressive packages to build a baseline of business.”
- “Over-pricing, not recognizing the COVID heyday bubble would pop.”
- “Assuming Mother Nature wasn't going to clean our clocks for Christmas and MLK weekend.”
- “Setting expectations with stakeholders on the role of marketing internally.”
- “Not understanding how our consumer/potential consumer views our resort. We need to do a better job leveraging all the amenities we have and communicating them out. We also fell short on creative. Need to differentiate in an industry filled with vanilla content.”
- “Lacked direct contact with potential customers for feedback.”

Marketing Lessons & Missteps

- “It is important to have a core team that understands the brand. Paying a little bit more for these critical specialist roles is a must.”
- “Playing it TOO local or core alienated the middle-of-the-bell-curve customer. You can be cool and talk to adventure families all at once.”
- “Our core market is very traditional in how it consumes media and most digital efforts have shown poor results. While we are talking to a high-tech audience, high touch contact is still very important.”
- “I wasn't prepared enough from a content planning standpoint to ride out a weak start to winter in the East. Moving forward, I really have to start thinking up content strategies that aren't so on-snow dependent but will still captivate and entertain our audience.”
- “Need to be more aggressive with packaging and promotions earlier in the buying cycle.”
- “PR on crowded days. We were in a situation this year where the marketing team was busy assisting guest services on a busy day and social media blew up with negative comments about crowding. We always need someone to stay behind the scenes to monitor, no matter how important helping operations may seem.”

Marketing Lessons & Missteps

- “Employee turnover is costly to productivity.”
- “Proper direction and planning to keep marketing focused and on track so personal feelings do not override data and analytics.”
- “Accuracy of message. Current information. Limited outreach. All needs to be fixed.”
- “Consistency matters in social media and too large of an offering for snowsports school and bike school makes it a marketing nightmare.”
- “Being methodical about reaching into a new market to create a great experience (we stepped into a new international market with a different language and were unprepared to deliver a great experience and proper info).”
- “Believing customers simply know about the area, there's no snow anywhere - you can still be skiing, we're making tons. How to get that word out, get people on skis.”
- “Social media is volatile - we walk a tightrope with advertising and local viewpoints of not wanting more people moving here.”

Marketing Lessons & Missteps

- “If you don't want to be publicly punished ... you've got to be so careful what you say on social. Especially direct messages. Those can be screenshot and posted.”
- “Too much in one message.”
- “Underestimating time requirements for long-term projects that are above and beyond the normal scope of the marketing department's responsibilities.”
- “We didn't focus enough energy on the guest pick up and conversion process this year.”
- “Nobody reads the fine print until after the purchase. Stay the course- knee jerk reactions don't go over well with customers.”
- “We have a lot more basic work to do before reaching out to other professionals to pitch in.”

Marketing Lessons & Missteps

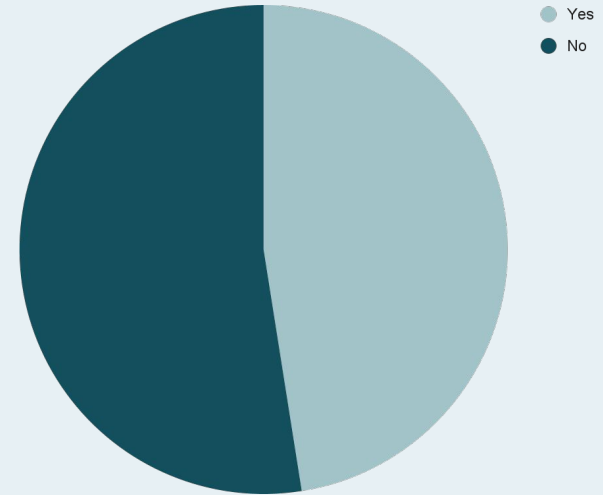
- “The saying ‘No need to reinvent the wheel’ should not ever apply. The predecessor for this position never changed anything, and this is the first year we have seen an increase in traffic across the board after 5 years.”
- “Overall we are learning that transparency is really important to our client base.”
- “Getting things out on time. Having a back up plan for when a newsletter system goes down. Getting more video of real people having a great time and not just pretty shots of the hill.”
- “Putting \$\$ in a college newspaper for recruitment and season pass advertising - was a total bust.”
- “Be prepared to do more with less. Be nimble and able to pivot quickly. Invest in staff training so they can deliver better performance and are fluent in upcoming trends so you do not get left behind.”
- “It's easy to get too focused on customer-facing communication. Internal communication is sometimes just as important. Arm your front line staff in all departments with solid information so that they can be good salespeople.”

A person is seen from behind, sitting on a ski lift chair. The chair is suspended from a cable that runs diagonally across the frame. The background is a vast, snow-covered mountain landscape with evergreen trees. The entire image has a light blue tint. The text 'DO YOU WORK WITH A MARKETING AGENCY?' is overlaid in large, white, bold, sans-serif font on the left side of the image. A thin white horizontal line is positioned below the word 'AGENCY?'.

DO YOU WORK WITH A MARKETING AGENCY?

Do You Work With a Marketing Agency?

Do you work with a marketing agency?	Percentage
Yes	47.5%
No	52.5%



If yes, what do you outsource? Answers included:

- Media Buying
- Creative Development
- Website Development
- SEO and Online Ads
- Social Media Management
- Public Relations (PR)
- Content Capture and Production
- Ad Placement and Reporting
- Brand Strategy and Messaging
- Video Production
- Digital Marketing Planning
- Search Engine Marketing (SEM)
- CRM Management
- Signage and Design Tasks

Do You Work With a Marketing Agency?

If yes, what do you outsource and why?

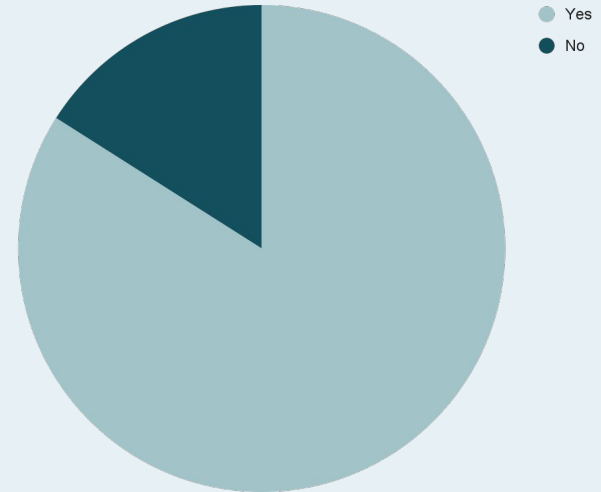
Resort Size	Insight
Less than 100,000 annual skier visits	Only 20% of respondents work with a marketing agency, the smallest percentage of all size categories. They outsource SEO and SEM, online advertising, paid social, and some planning and creative work.
100,000 - 250,000 annual skier visits	61% of respondents, or 14 of 23, work with a marketing agency, most commonly for design and creative as well as media buys (including paid social and digital campaign management), website development and maintenance, PR, and social media management.
250,000 - 500,000 annual skier visits	54.5% of these respondents work with a marketing agency, all of which outsource for help with media buying (paid search, ad placement). Other outsourced efforts include brand creative, production, and PR. Reasons given included having too small a team to do it all and, "Efficiency of time and effectiveness, allowing internal staff to focus on bigger strategic thought."
500,000 - 1 million annual skier visits	66.7% of respondents work with a marketing agency, specifically for things like campaign ideation and creative execution as well as media strategy, paid advertising and reporting. Reference was made to using agencies for getting the most out of their budgets.
More than 1 million annual skier visits	100% of respondents work with an agency in some capacity for services including branding and creative, media buying, international PR, and content capture and production.



RECIPROCAL RELATIONSHIPS & MULTI-RESORT PASSES

Reciprocal Relationships & Multi-Resort Passes

Does your resort have a reciprocal pass holder benefit relationship, or participate in a multi-resort pass product?	Percentage
Yes	84.4%
No	15.6%



Respondents were asked to rank from 1-5, "From a marketing perspective, how important is it to be aligned with other resorts for season pass sales?" 1 = not important, 5 = very important. **The aggregated responses ranked the importance at 3.5 out of 5.**



PLANS FOR 2024-25 SEASON

Plans for 2024-25 Season

Which of these reflect your plans for FY 2024?	Count
<i>Leveraging data to make smarter/faster decisions</i>	37
<i>Cultivating a better understanding of customer needs</i>	33
<i>Investing in summer experiences</i>	30
<i>Evolving our internal culture and org structure</i>	29
<i>Launching new products and services</i>	27
<i>Differentiating our brand through innovation</i>	20
<i>Adopting new methods/processes for working</i>	19
<i>Competing more aggressively on price</i>	16
<i>Creating a more effective/nimble partner ecosystem</i>	8
<i>Expanding into new geographic regions</i>	8
<i>Embracing emerging tech before our competitors</i>	7
<i>Other</i>	1

Our Take: With more than half of resort marketers indicating their intent to leverage data to make smarter/faster decisions in the upcoming season and with the upcoming GA4 changes, now more than ever marketers must have a transition plan for safeguarding existing analytics as well an action plan for capturing and storing analytics moving forward.

CONCLUSION



Conclusion

First and foremost, we'd like to thank our resort partners for being so generous with their time and candid in their replies. With the inaugural survey complete, we now have a benchmark to begin building upon over the following years. There will be refinements and adjustments to the survey and the report to make it an even more valuable resource for ski area marketers.

The results of the survey reinforce the notion that nearly every ski area is unique. Variables such as location, size, target markets, ownership, and personnel all contribute to this. However, they all share a common thread of the necessity for effective marketing. Despite the myriad differences from one operation to another, learning how others—regardless of size or location—approach their marketing strategies, what the makeup of their teams are, where they're spending their money, and other important details that this report aims to share can help the entire industry flourish.

We sincerely hope this report has been useful to you, and we welcome your feedback.

Thank you.

