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CROSS-COUNTRY SKIER TRENDS
AND PROFILES

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TABLE OF CONTENTS

| | PAGE |
|---|------|
| LIST OF TABLES | ii |
| LIST OF FIGURES. | iii |
| LIST OF APPENDICES | iv |
| INTRODUCTION | 1 |
| DESCRIPTION OF STUDY AREA. | 3 |
| MAP OF CITY AND ZIP CODES. | 4 |
| SURVEY METHODOLOGY | 5 |
| SURVEY RESULTS | 6 |
| RESIDENCE AND TRAVEL. | 6 |
| PREFERENCE AND USE. | 11 |
| SOCIO-ECONOMIC CHARACTERISTICS OF SKIERS. | 16 |
| ORGANIZATIONAL AFFILIATION. | 20 |
| SKILL LEVEL AND PARTICIPATION RATES | 21 |
| MONTHLY SKIING FREQUENCY. | 22 |
| EQUIPMENT OWNERSHIP | 23 |
| OTHER WINTER SPORT PARTICIPATION. | 24 |
| SUPPORT OF USER FEES. | 25 |
| SUMMARY AND CONCLUSIONS. | 27 |

LIST OF TABLES

| | PAGE |
|---|------|
| TABLE 1. Place of Residence | 6 |
| TABLE 2. Transportation Mode. | 7 |
| TABLE 3. Trails Used for Skiing (in percent). | .13 |

LIST OF FIGURES

| | PAGE |
|---|------|
| FIGURE 1. Distance Traveled to Ski. | 8 |
| FIGURE 2. Difficulty in Locating. | 9 |
| FIGURE 3. Difficulty in Parking | 10 |
| FIGURE 4. Preferred Type of Terrain | 12 |
| FIGURE 5. Most Preferred Ski Trails | 15 |
| FIGURE 6. Age of Male/Female Skiers | 17 |
| FIGURE 7. Income of Respondents | 18 |
| FIGURE 8. Ski Outing Expenditure | 19 |
| FIGURE 9. Percent of Respondents with Organizational Affiliation | 20 |
| FIGURE 10. Skill Level of Skiers | 21 |
| FIGURE 11. Monthly Skiing Frequency. | 22 |
| FIGURE 12. Racing Trail Development. | 23 |
| FIGURE 13. Other Winter Sport Participation. | 24 |
| FIGURE 14. Support of User Fees. | 25 |
| FIGURE 15. Fair Amount for User Fees | 26 |

INTRODUCTION

The Tourism Management & Development Center is a special program within the School of Business and Economics at the University of Minnesota, Duluth. The basic goal of the Center is to provide technical assistance to private businesses and public and non-profit organizations in northern Minnesota to manage and develop tourism-oriented programs and facilities. Specific activities include conducting seminars, workshops, and research related to resorts, motels, restaurants, outfitters, campgrounds, and other tourism-oriented small businesses. The Center's research efforts are focused on targeted market segments of visitors, such as fishermen, skiers, campers, senior citizens, special populations and international visitors.

Cross-country skiing as a sport has matured and gained immense popularity in the past five years. This survey of cross-country skiers in Duluth was conducted during the winter of 1983-84 by student interns of the Tourism Management and Development Center. It was designed to be a follow-up to a study conducted during the winter of 1978-79. The 1978-79 report, Cross-Country Skiers: A Duluth Survey, was conducted by the Lake Superior Basin Studies Center, University of Minnesota, Duluth, in order to monitor use of trails and learn the characteristics of Duluth skiers. The survey was conducted at ski trails operated by the city of Duluth and included Lester Park Golf Course, Amity-Lester Park, Hartley Field, Chester Park, Spirit Mountain, and Magney-Snively Park. This report will examine

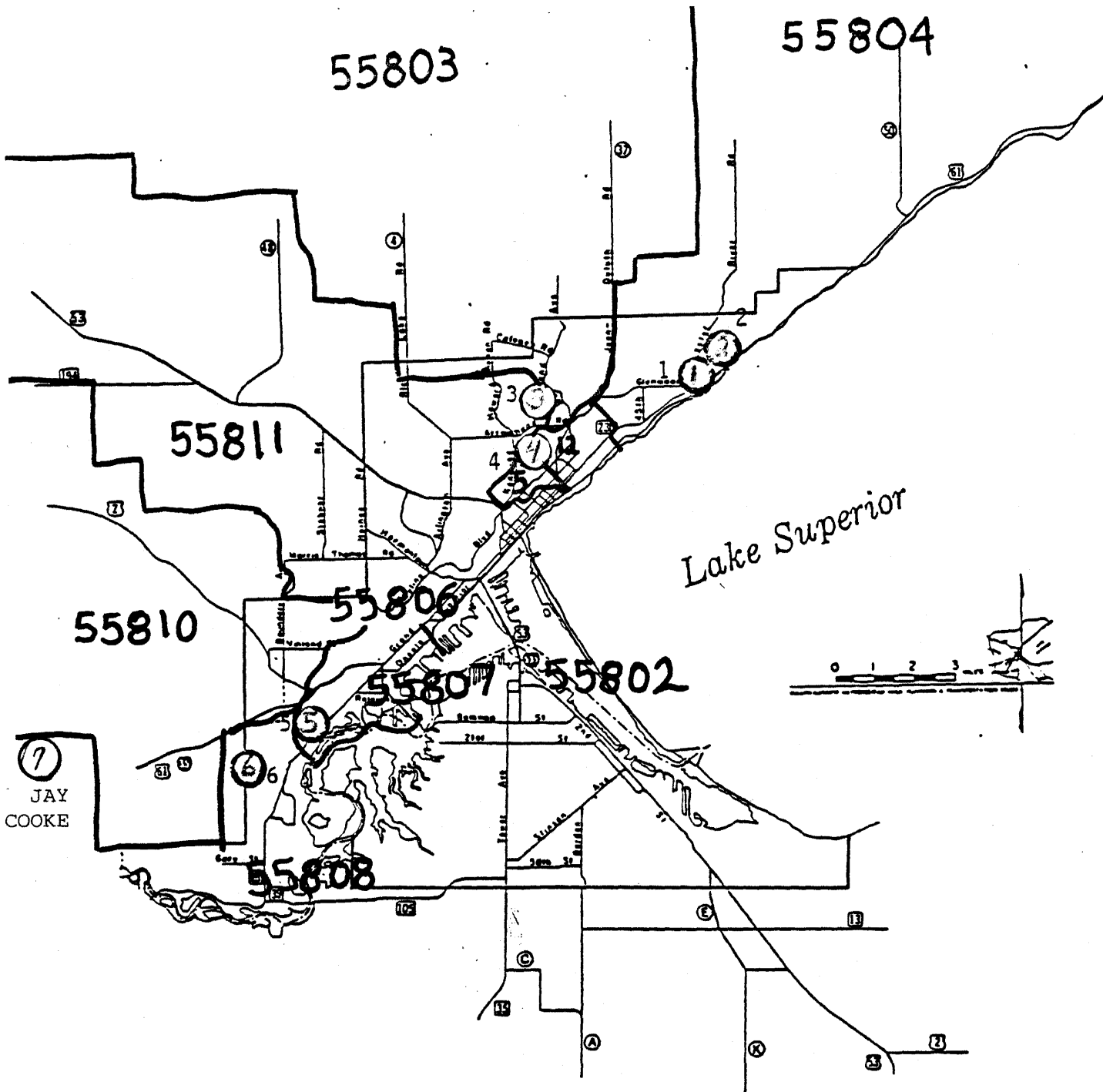
trends and skier profiles, which may be used by park and recreation departments, resorts, and others in meeting the needs and expectations of skiers.

DESCRIPTION OF STUDY AREA

The cross-country skier survey was conducted at various ski trails in and around Duluth, MN. Duluth, a city with a population of approximately 90,000 people, stretches for 20 miles along the St. Louis River and Lake Superior. At its widest, Duluth measures less than five miles across. This geographic configuration creates a long, linear city with distinct neighborhoods. The majority of the ski trails mentioned in the ensuing report are located in areas which are primarily utilized by residents in and directly adjacent to the ski trail, giving them a "neighborhood" clientele. The neighborhood trails used were: Lester Park Golf Course, Amity-Lester Park, Hartley Field, and Chester Park.

The exceptions to the "neighborhood" ski trails are Spirit Mountain Recreation Complex, Magney-Snively and Jay Cooke State Park. The Spirit Mountain facilities are owned and operated by the city of Duluth and consist of both cross-country and downhill skiing. Magney-Snively Park is in close proximity to Spirit Mountain, remote from most neighborhoods. Jay Cooke State Park, which lies just outside the western city limits, is managed by the State of Minnesota. The park has many miles of trails, which vary from level runs to some fairly hilly runs, due to the rugged terrain found there.

MAP 1: Map of City and Zip Codes



1. Amity-Lester
2. Lester Park Golf Course
3. Hartley Field
4. Chester Park
5. Spirit Mountain
6. Magney-Snively
7. Jay Cooke

SURVEY METHODOLOGY

Interviews of cross-country skiers were conducted at six sites within the city limits of Duluth. They are: Amity-Lester, 15 kilometers (k) of trails; Chester Park, 3 k of trails; Hartley Field, 5 k of trails; Lester Park Golf Course, 3 k of trails, Magney-Snively, 7.5 k of trails; and Spirit Mountain, 20 k of trails. Also included as an interview site was Jay Cooke State Park because of its proximity to Duluth. There are 21 k of trails at Jay Cooke.

Skiers were asked to participate in the survey as they came off the ski trail. Only one person in a ski party was asked the interview questions (see Appendix C for a copy of the interview guide). All sites, with the exception of Jay Cooke State Park, were surveyed four times; twice on weekdays and twice on weekends. Survey times were from 1 - 5 p.m. on weekdays, 8 - 4 p.m. on Saturdays, and 12 noon - 4 p.m. on Sundays. Interviews were conducted between January 4 and February 24, 1984.

SURVEY RESULTS

The materials in this report attempt to give the reader a profile of skiers utilizing city- and state-operated cross-country ski trails. The type of trail preferred for ski outings and the distance skiers travel in order to enjoy their sport, age and sex distinctions, and income and expenditure data are examined, as are other factors relative to cross-country skiing.

Reference is made in the data to a cross-country skier profile report conducted in 1978-79, which will give the reader a comparison by which to measure change in the profile of cross-country skiers. A summary of the 1978-79 report can be found in Appendix B.

RESIDENCE AND TRAVEL

Examination of the skiers' zip codes gives indication of the residence of skiers. Comparing 1979 data to that of 1984 shows a slight decrease in percent of Duluth area residents interviewed in 1984. Skiers from the Minneapolis/St. Paul metropolitan area account for 9.6 percent of the skiers interviewed in 1984.

TABLE 1. Place of Residence

| <u>1984</u> | | <u>1979</u> | |
|---------------------------|------|---------------------------|----|
| Cloquet/Carlton/Esko | 6.3 | Duluth/Proctor/Hermantown | 75 |
| Duluth/Proctor/Hermantown | 69.0 | Wisconsin | 3 |
| Mpls/St. Paul Area | 9.6 | All Other Zip Codes | 20 |
| Wisconsin | 2.4 | | |
| Outstate Minnesota | 5.6 | | |
| Iron Range | 4.0 | | |
| PERCENT TOTAL | 96.9 | | 98 |

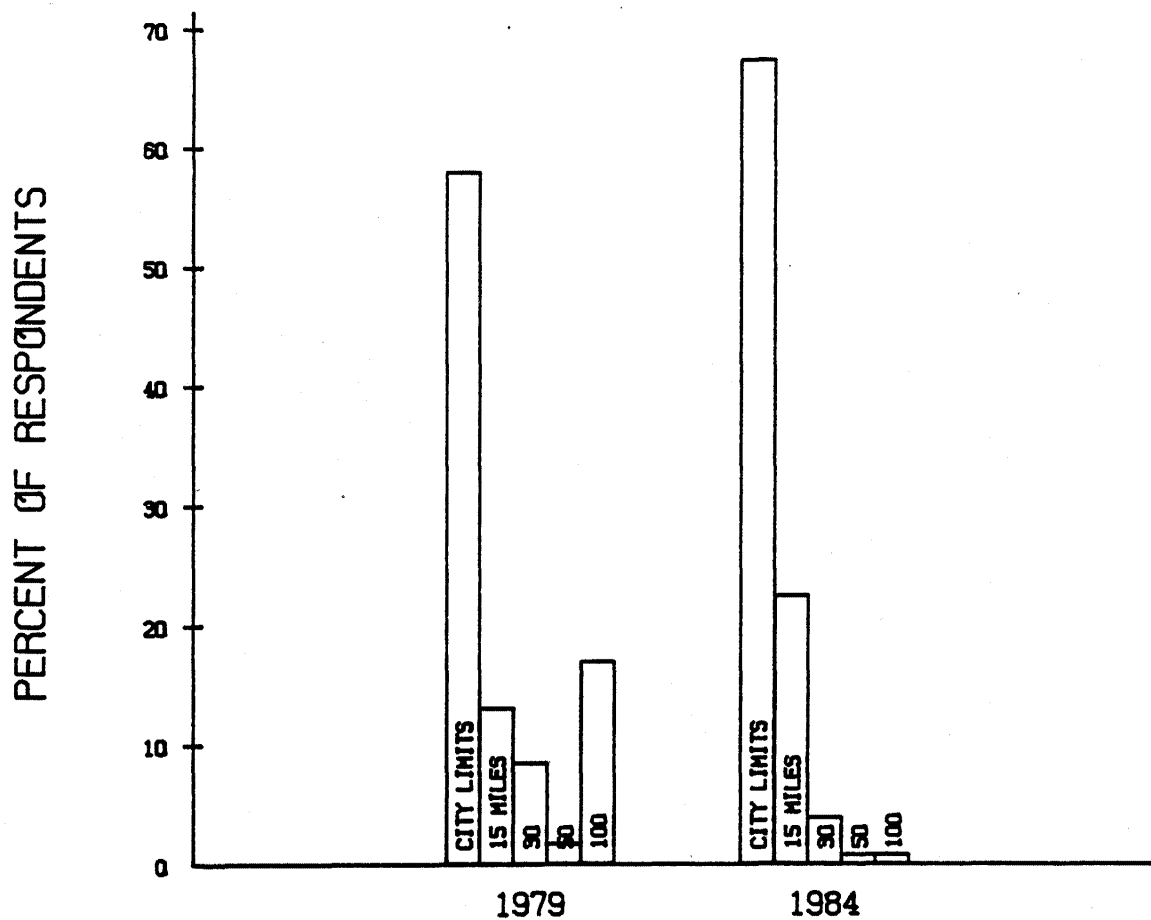
TABLE 2. Transportation Mode in Percent

| | <u>1979</u> | <u>1984</u> |
|-----------|-------------|-------------|
| Walk | 4.0 | 5.4 |
| Vehicle | 92.6 | 89.9 |
| Local Bus | 1.1 | 1.6 |
| Skied | 2.3 | .8 |
| Other | | 1.6 |

Two of the skiers interviewed in the 1984 study arrived in Duluth via the Ski Train and were interviewed at Spirit Mountain. These two people account for the 1.6 percent in the 'other' category.

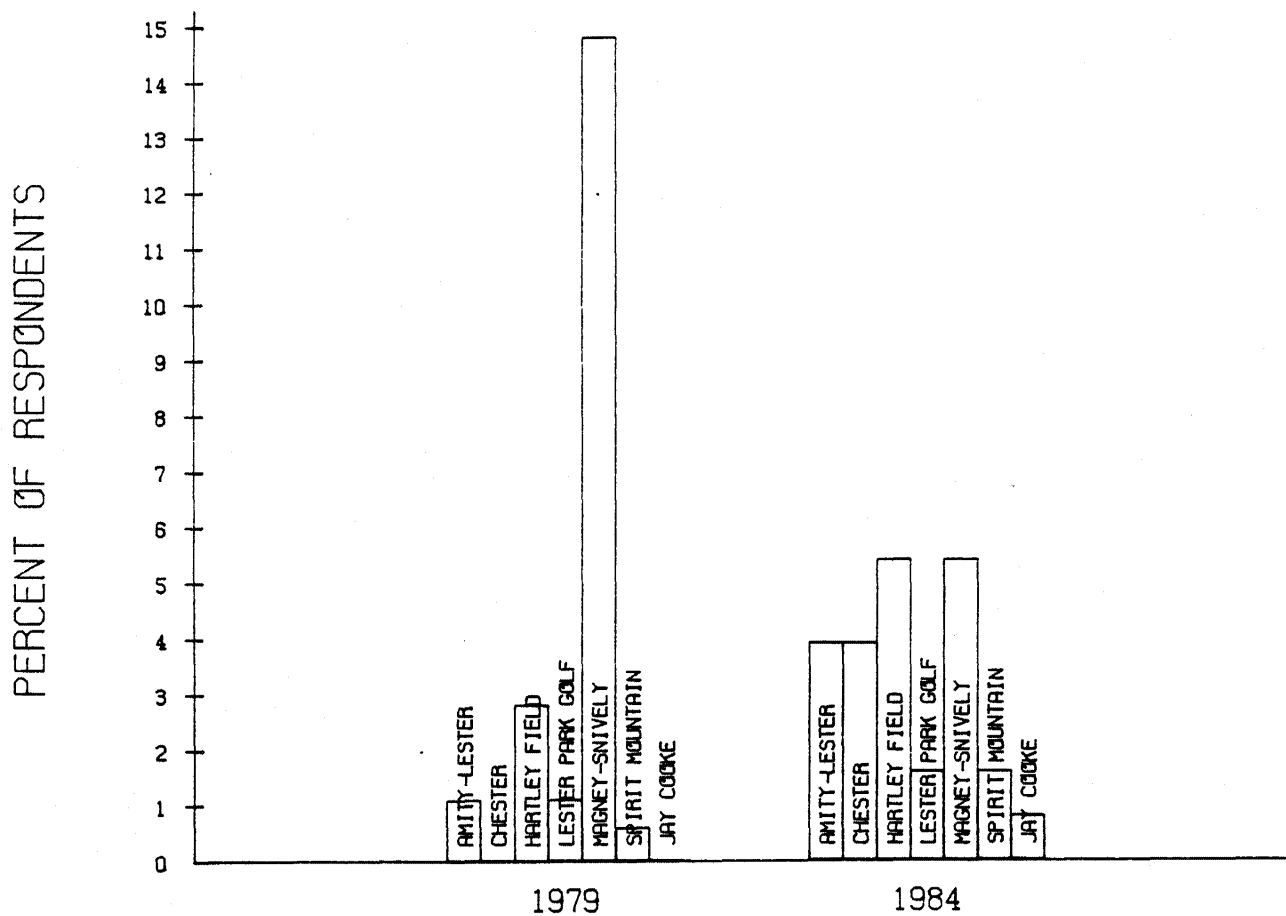
Respondents were asked, "How far from home do you ski?" There is a trend toward preference of skiing close to home. In 1984, 89.9 percent of the respondents preferred to ski within the city limits of Duluth or within 15 miles of Duluth. This is an increase from 71.1 percent in 1979.

FIGURE 1. Distance Traveled to Ski Trail



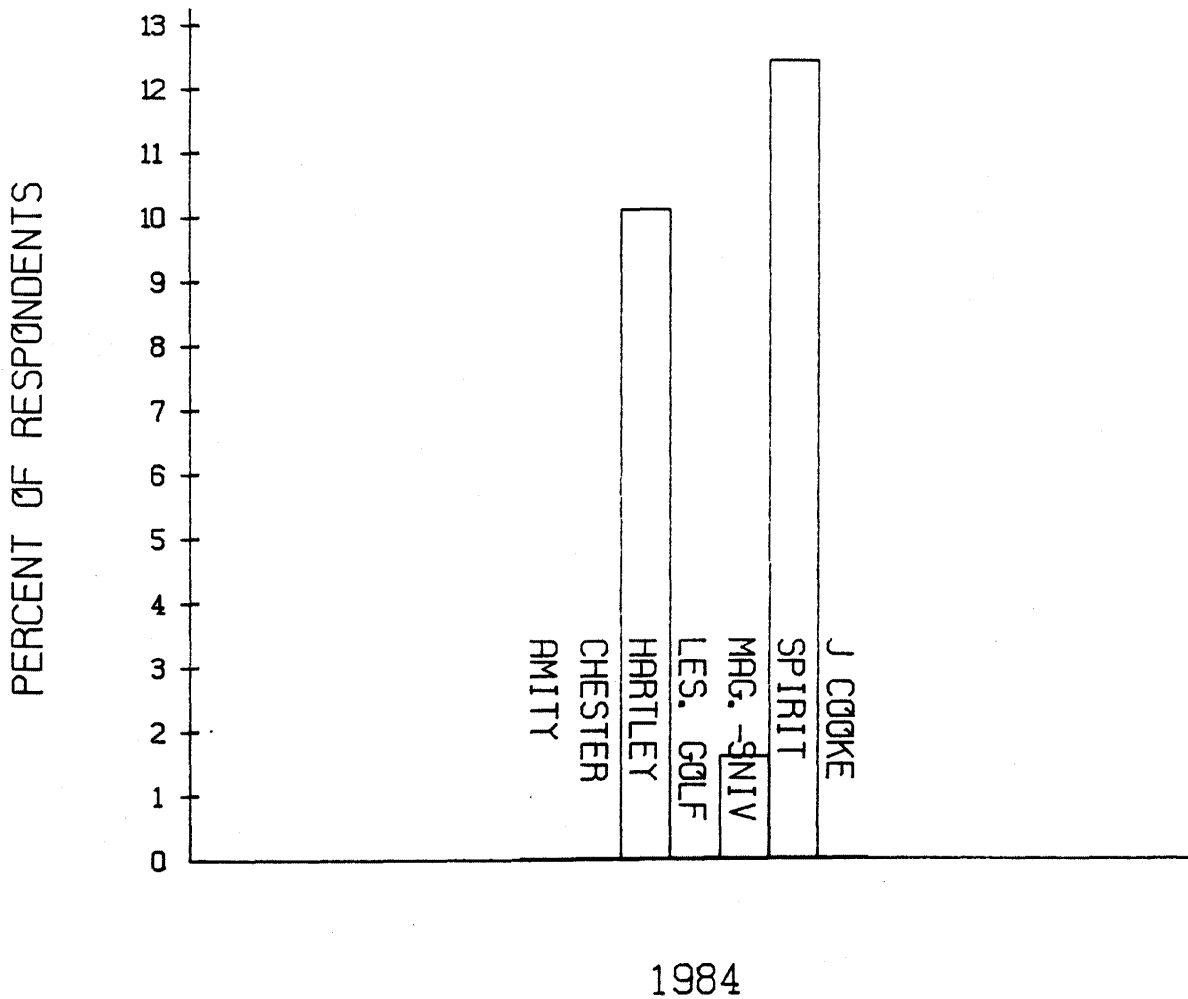
In 1979, 14.8 percent of the respondents had difficulty in locating the Magney-Snively ski area. This number decreased in 1984, and all seven ski areas had less than 6 percent of the respondents expressing difficulty in locating trail access points.

FIGURE 2. Difficulty in Locating Ski Trail



A question was added to the 1984 survey regarding parking. Skiers were asked if they had a difficult time parking once they had arrived at the ski area. Difficulty in parking was experienced at Hartley by 10.1 percent and at Spirit Mountain by 12.4 percent of the respondents. The remainder of the sites posed no parking problems.

FIGURE 3. Difficulty in Parking at Ski Trails



PREFERENCE AND USE

Cross-country skiers were asked which trails they used and preferred for skiing. Skier opinions were grouped according to zip code in order that 1) a correlation of area of residence and trails could be made, and 2) a comparison of which trails skiers used in a particular area could be made with trails which they preferred for skiing.

The data show that most skiers utilize trails located within a short distance of their place of residence. The distance skiers traveled for skiing supports the concept of "neighborhood ski trails." For example, the 55812 zip code area contains two ski trails, Hartley Field and Chester Park. Examination of the graphs found in the Appendix shows that these trails are most frequently used by persons living in close proximity to the parks. Another example of this local use is Lester Park ski trails, which are also used frequently by nearby residents.

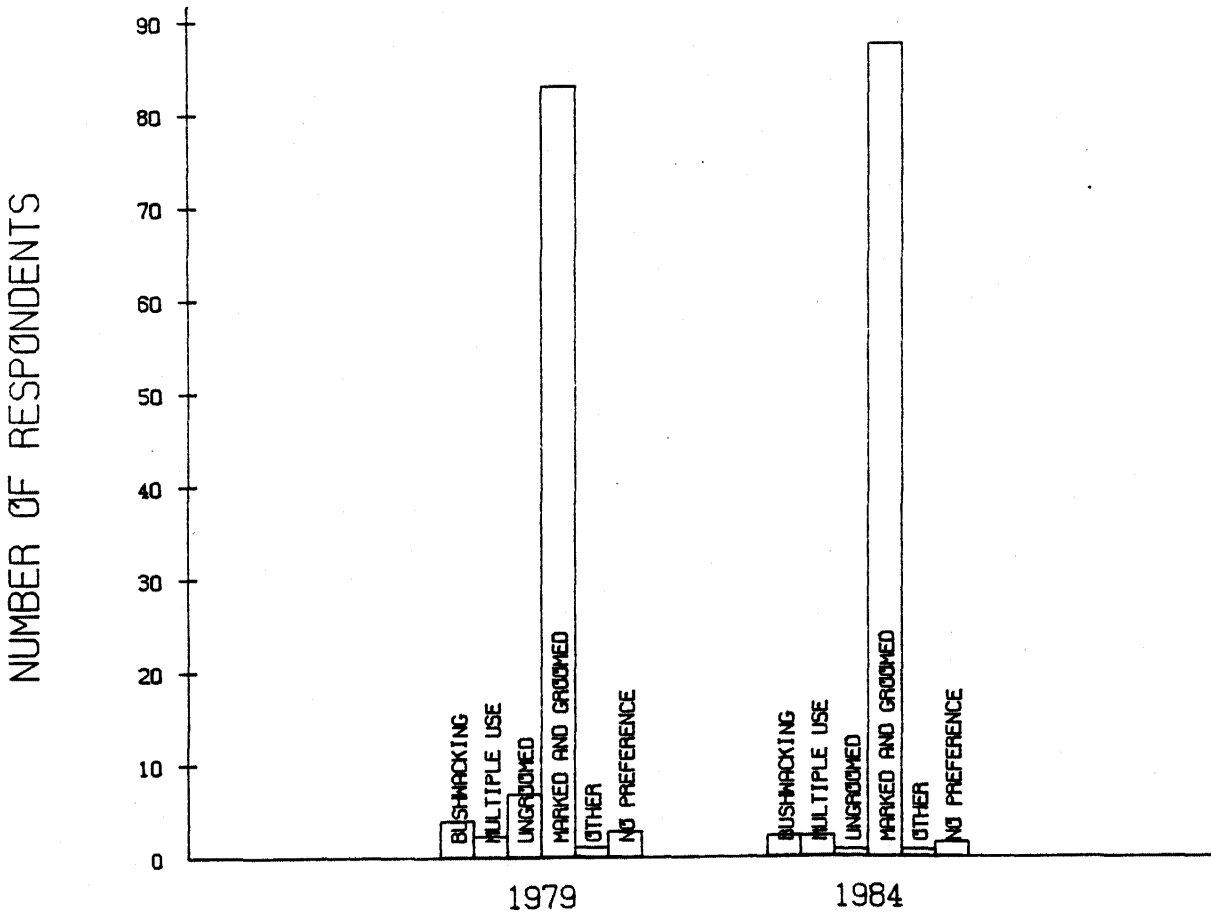
The exceptions to the local use of ski trails are Spirit Mountain and Jay Cooke State Park. Both of these ski areas are used more or less equally by most zip code areas.

Examination of the data reveals that skiers, though they may use a particular trail system, may not actually prefer it. For example, Hartley Field ski trails are used most frequently by skiers residing in the zip code area surrounding that trail. When one examines use compared to where the skiers prefer to ski, Spirit Mountain's popularity is evident. Residents of zip code area 55812 prefer Spirit Mountain (35 percent) over Hartley Field (7 percent). Though use of Spirit Mountain ski trails by residents of the 55812 zip code area was slightly less than that

of Hartley Field, the same residents overwhelmingly preferred skiing at Spirit Mountain. The data tends to support the idea that skiers may use neighborhood trails, but may prefer skiing at another trail area.

Regarding the type of skiing terrain preferred, 83.0 percent (1979) and 87.6 percent (1984) of the survey participants preferred skiing on marked and groomed trails. This high percentage has a built-in bias in that the interviews were conducted at marked and groomed trails.

FIGURE 4. Preferred Type of Terrain



Cross-country skiers are using more trails than they were in 1979. Interviewees were asked which trails they had skied on. The data show increases in use at Chester Park, Magney-Snively, and Spirit Mountain when compared to the 1979 results. Decreases in use were seen at Amity-Lester and Lester Park Golf Course. Jay Cook State Park, not included in the 1979 survey, was utilized by 41.9 percent of the skiers surveyed.

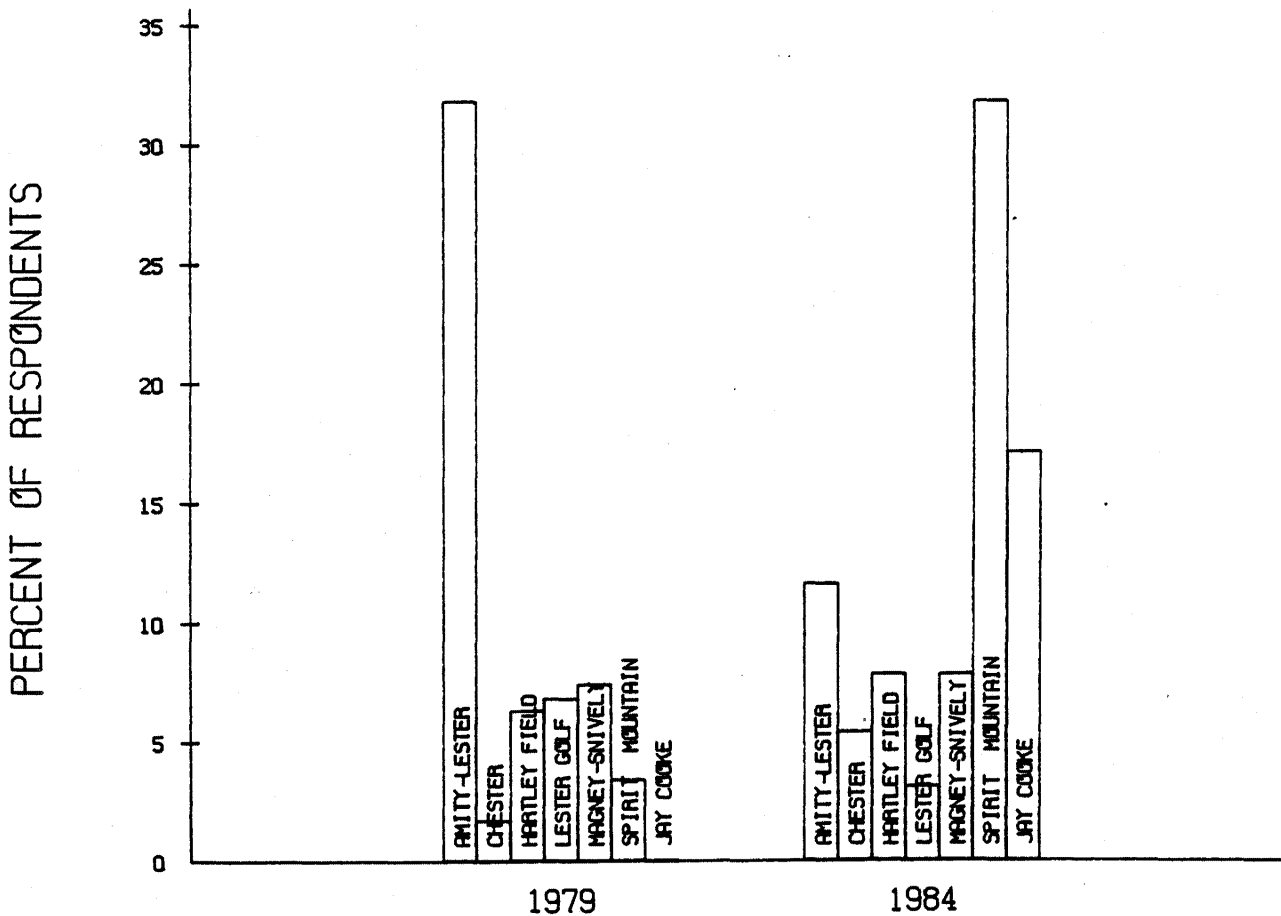
TABLE 3. Trails Used For Skiing (in percent)

| | <u>1979</u> Trail Use | <u>1984</u> Trail Use |
|----------------------------|--------------------------|--------------------------|
| Amity-Lester | 61.4 | 50.4 |
| Chester | 30.7 | 47.3 |
| Hartley Field | 47.2 | 47.3 |
| Lester Park Golf Course | 60.8 | 42.6 |
| Magney-Snively | 33.5 | 38.8 |
| Spirit Mountain | 41.5 | 68.2 |
| Jay Cooke | NA | 41.9 |

Skiers were surveyed as to which of the ski trails included in the survey they preferred. Spirit Mountain was shown greater desirably by the majority of the respondents, with over 30 percent preferring it. The next most preferred ski trail was Jay Cooke State Park. The remaining ski trails were preferred by less than 10 percent of the respondents.

In the city of Duluth cross-country skiers were asked which of the seven trails they preferred. In 1979, Amity-Lester was the favored ski area with 31.8 percent of the respondents preferring to ski there. Ski trail preference has changed in the past five years. Jay Cooke State Park was included in the 1984 study. Having Jay Cooke as a choice, 17.1 percent of the respondents preferred skiing at Jay Cooke State Park. Spirit Mountain has made many improvements in their trail system, which may account for a 25 percent increase in preference.

FIGURE 5. Most Preferred Ski Trails

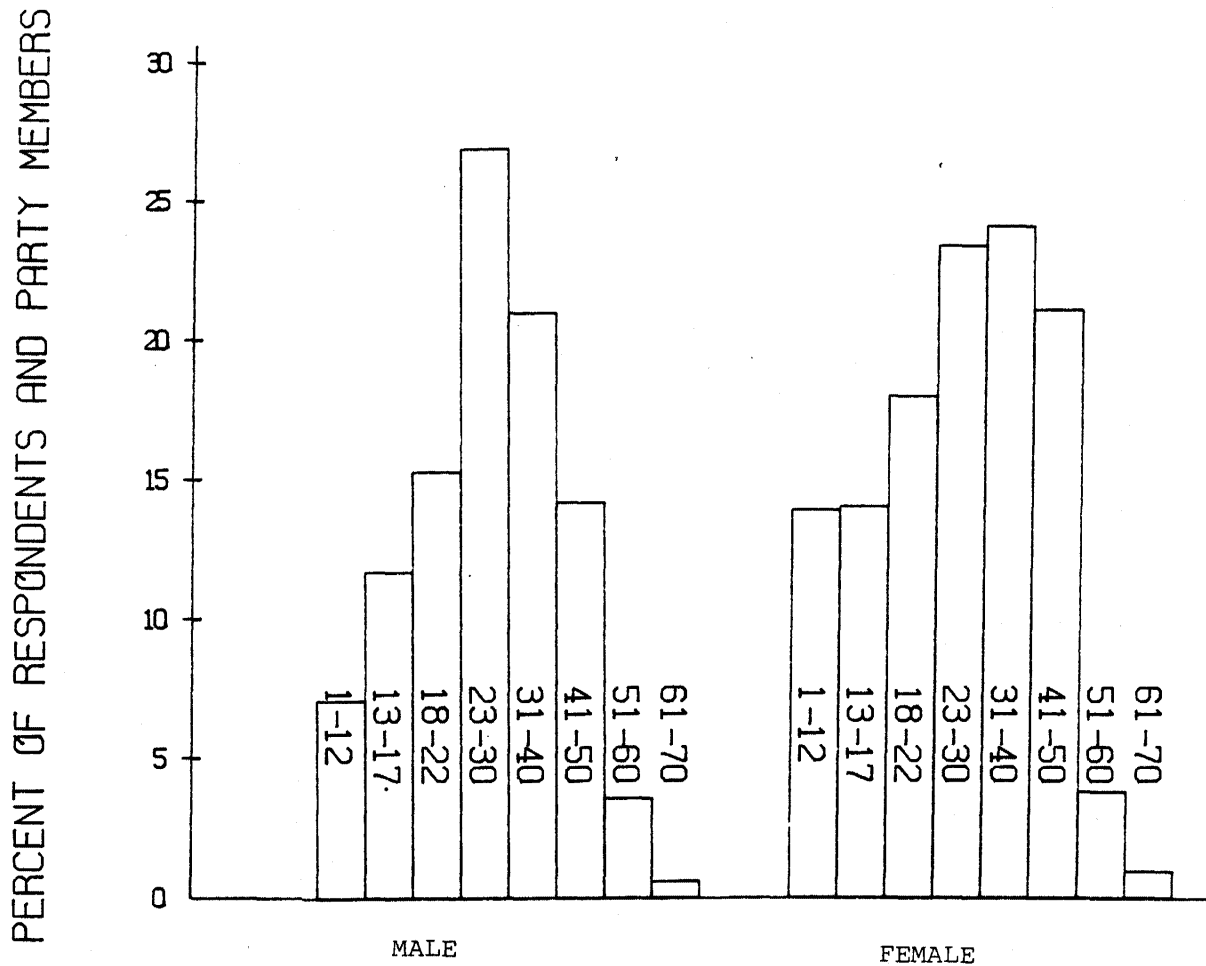


SOCIO-ECONOMIC CHARACTERISTICS OF SKIERS

A total of 129 people participated in the 1984 study. Ski party size ranged from one to nine. Respondents and their party members totaled 290. Males accounted for 171 (59 percent) of the 290, females 119 (41 percent) of the total.

In both gender groupings, the largest percentage of skiers were between the ages of 23-40 years of age. Males age 23-40, constituted 36.4 percent of the total, while females, within the same age group, constituted 51.2 percent. Whereas the male group showed a sharp contrast between the 23-30 years of age group and all other groupings, the female group was more homogeneous. The lowest percentage of skiers by age were those skiers, both male and female, over the age of 50. A very low proportion of skiers were below the age of 12. The data, however, is not complete enough to support classifying cross country skiing as a sport of only post-teenage persons.

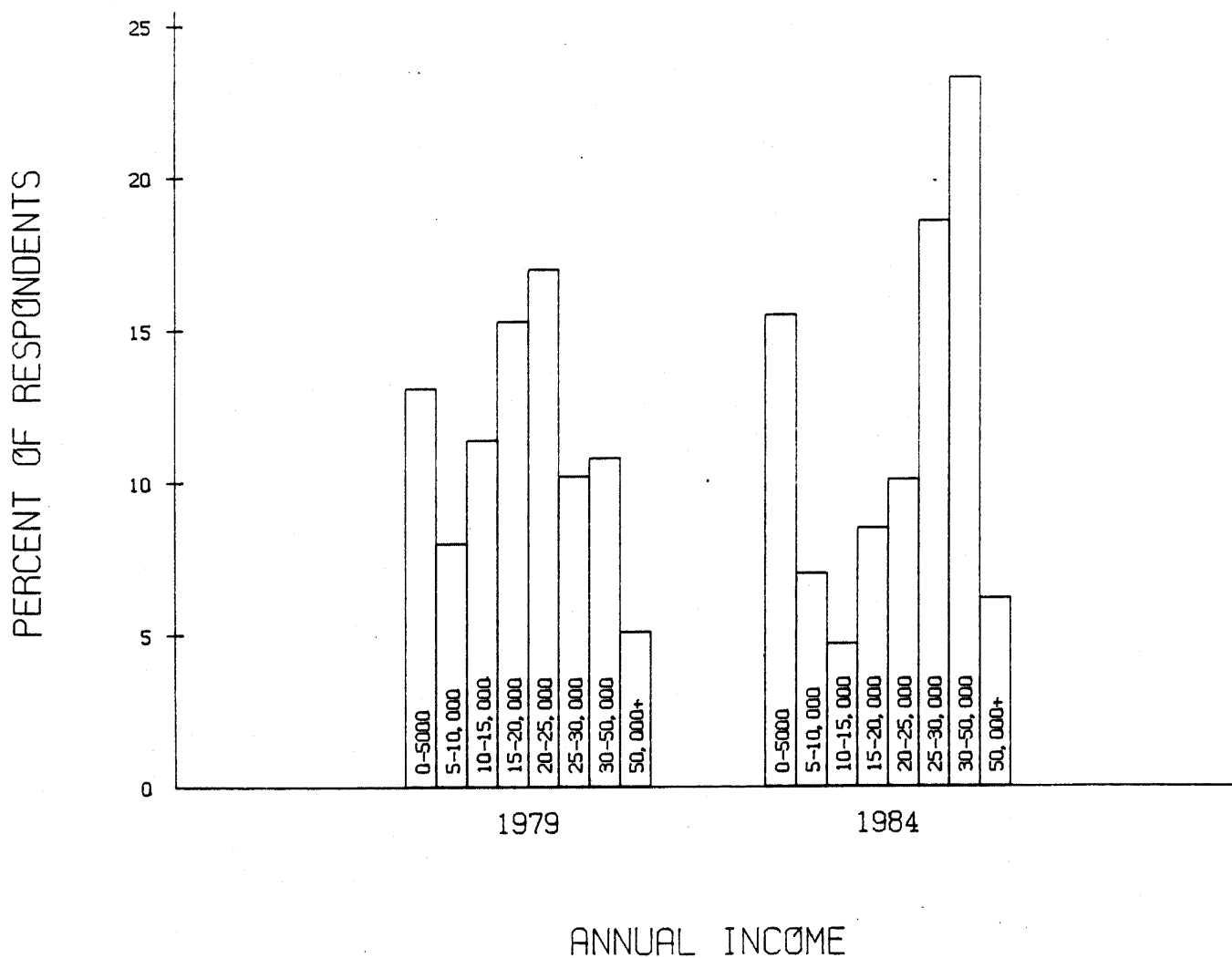
FIGURE 6. Age of Male/Female Cross-Country Skiers



1984

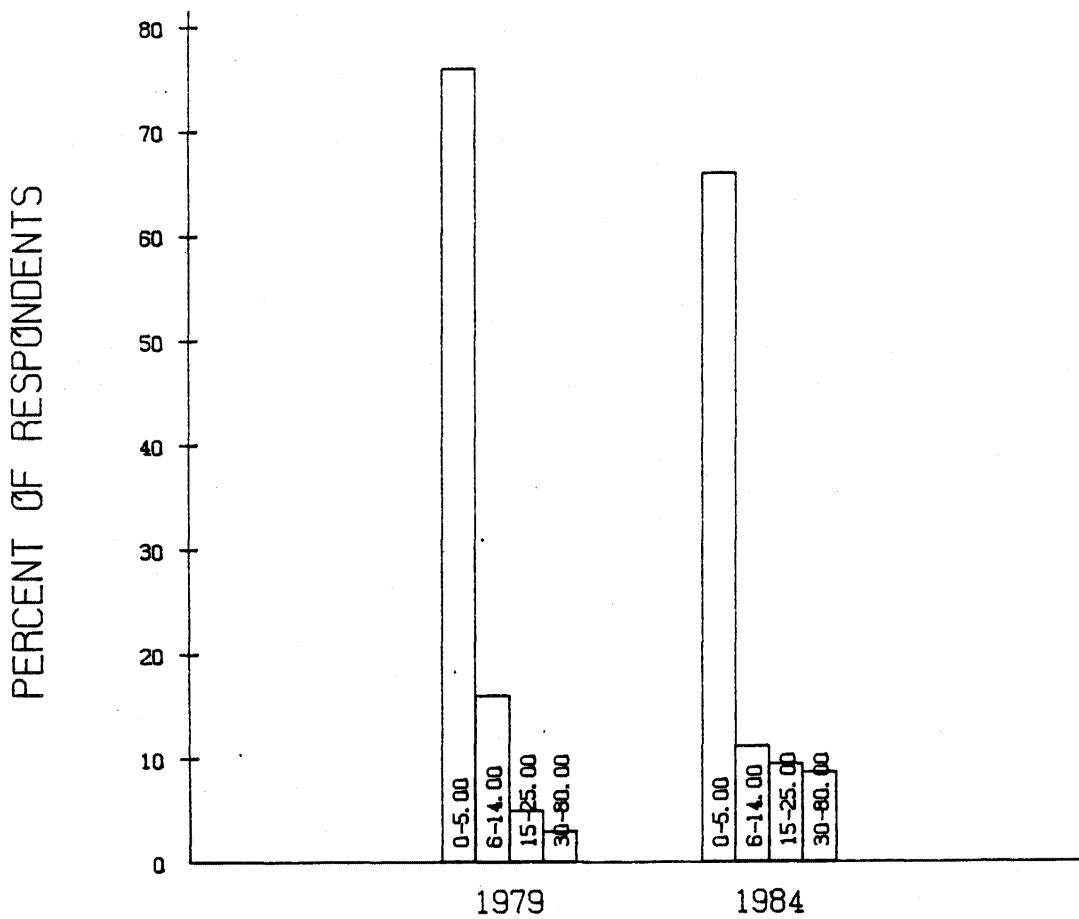
There was an increase in household income of skiers in the five years between studies. This may be attributed to the increase in the number of two-income families as shown by the 1980 U.S. census. The \$25-30,000 income range increased from 10.2 percent of the respondents in 1979 to 18.6 percent of the respondents in 1984. The \$30-50,000 income range also rose dramatically. In 1979, 10.8 percent of the respondents were in this income category compared with 23.3 percent in 1984.

FIGURE 7. Income of Respondents



The amount of money spent on a ski outing did not change significantly in the five year interval between surveys. The majority of skiers, 70 percent, spent \$5 or less on their ski outing. Many commented that the only money spent that day was the cost for the gas from home to the ski area and back home again. The skiers which spent between \$30 and \$80 during their ski outing were non-Duluth residents on a visit to Duluth.

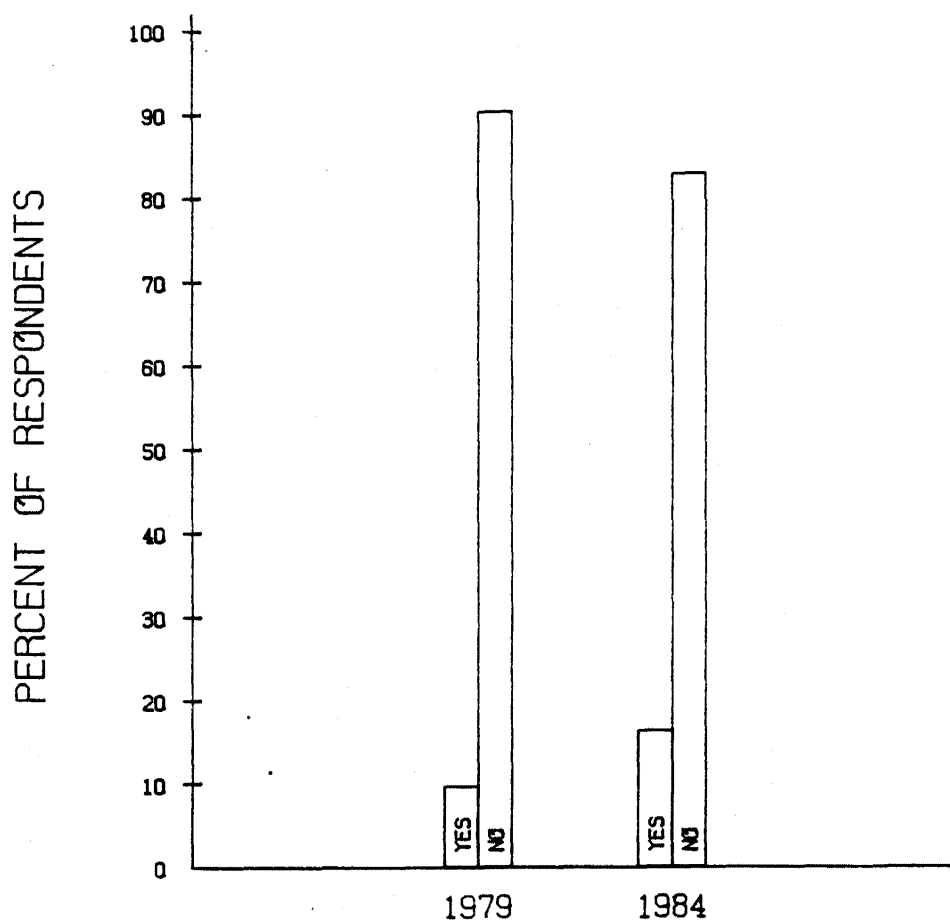
FIGURE 8. Ski Outing Expenditure



ORGANIZATIONAL AFFILIATION

More skiers belonged to a cross-country ski club in 1984 than in 1979. This is an increase from 9.7 percent in 1979 to 16.3 percent in 1984. Examination of the data collected showed that club members ski more frequently than do non-club members.

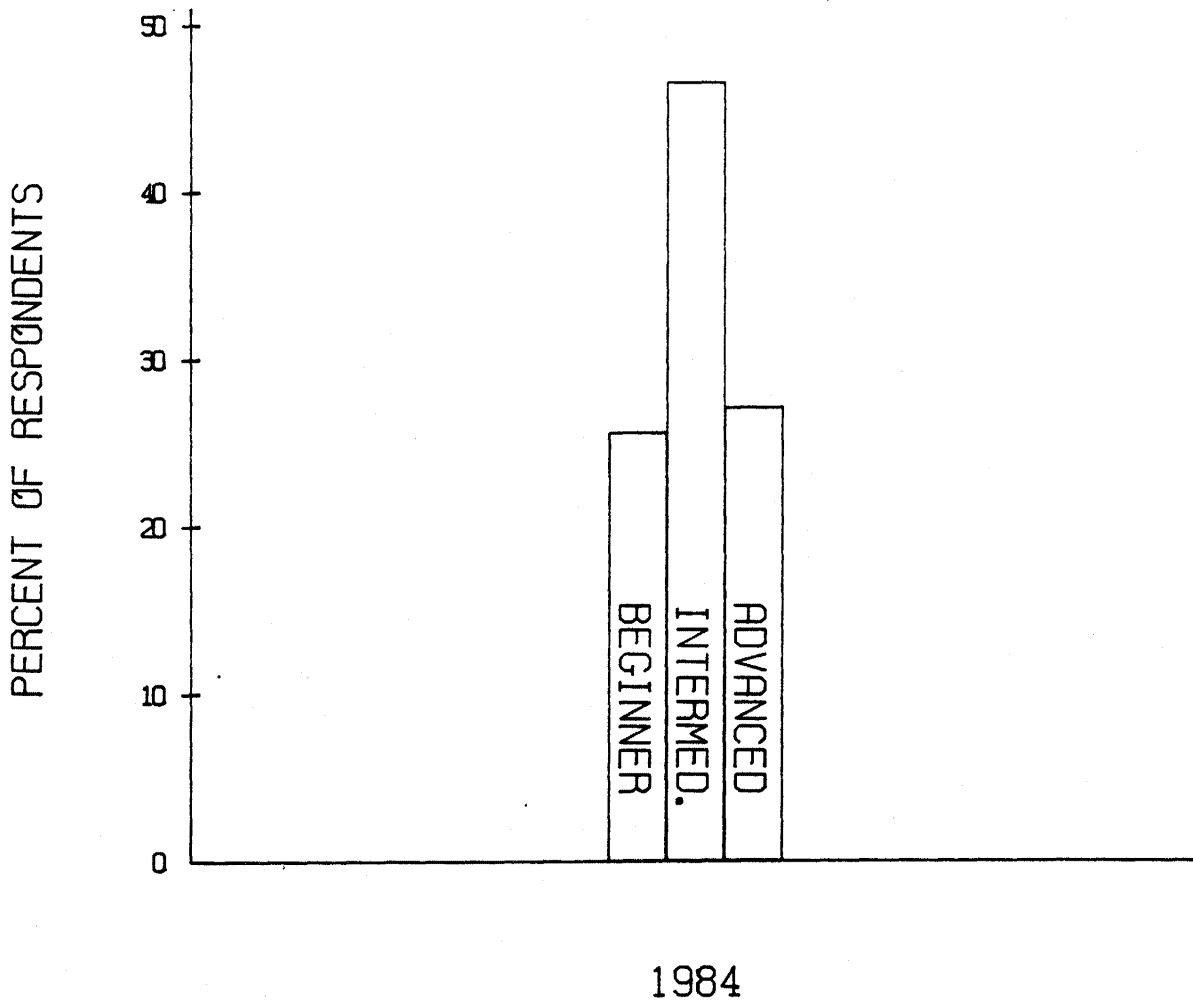
FIGURE 9. Organizational Affiliation



SKILL LEVEL AND PARTICIPATION RATES

As a skier spends more time cross-country skiing, his or her skill level increases. People that consider themselves advanced skiers ski more than 12 times per month, beginner skiers ski less than four times per month. Intermediate skiers ski between four and 12 times per month.

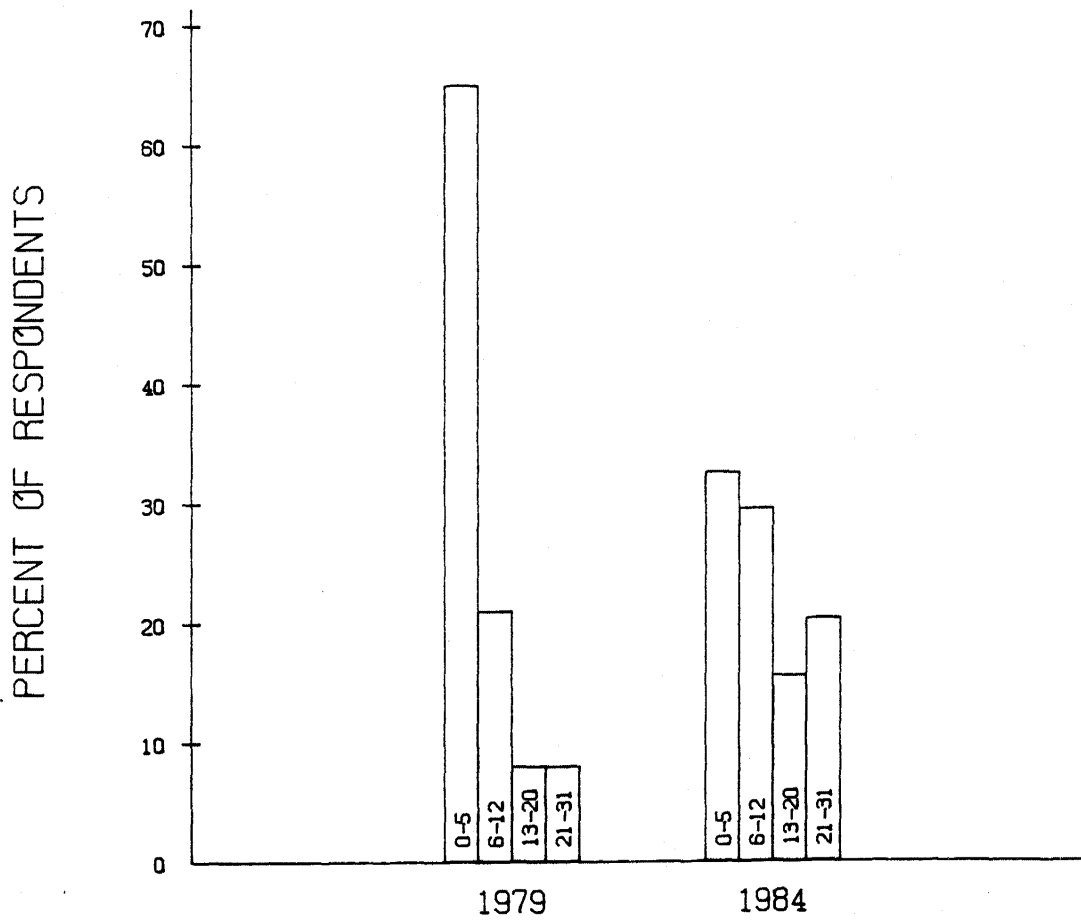
FIGURE 10. Skill Level of Skiers



MONTHLY SKIING FREQUENCY

Cross-country skiing is becoming a more popular winter-time activity. In 1979, only 16 percent of the skiers skied more than 12 times per month. This percentage increased to 36.8 percent in 1984.

FIGURE 11. Monthly Skiing Frequency

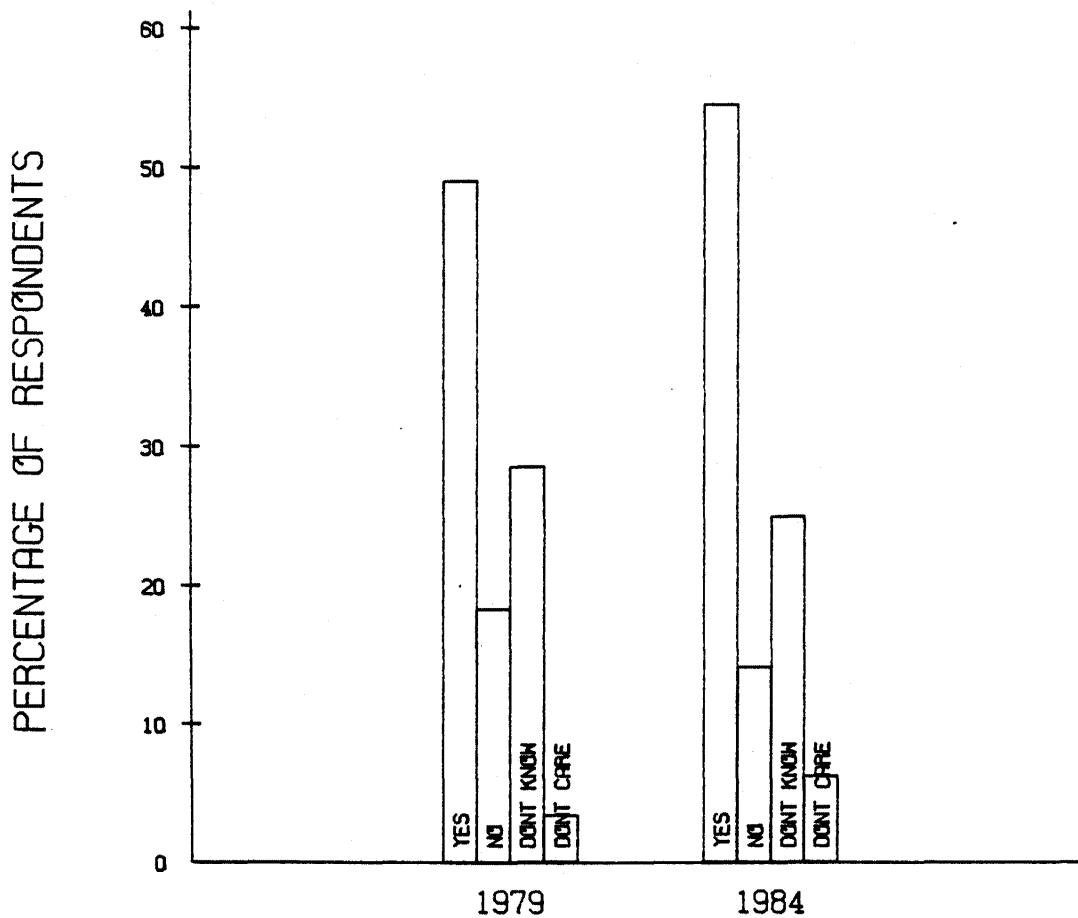


EQUIPMENT OWNERSHIP

The great majority of cross-country skiers own all of their equipment (93.2 percent - 1979, 90.7 percent - 1984). The skiers interviewed that were renting equipment were novice skiers skiing at Spirit Mountain.

Respondents felt that there is a need for the development of advanced and racing trails. This is not unusual considering that 73.6 percent of the skiers interviewed view themselves as intermediate or advanced skill level skiers.

FIGURE 12. Racing Trail Development



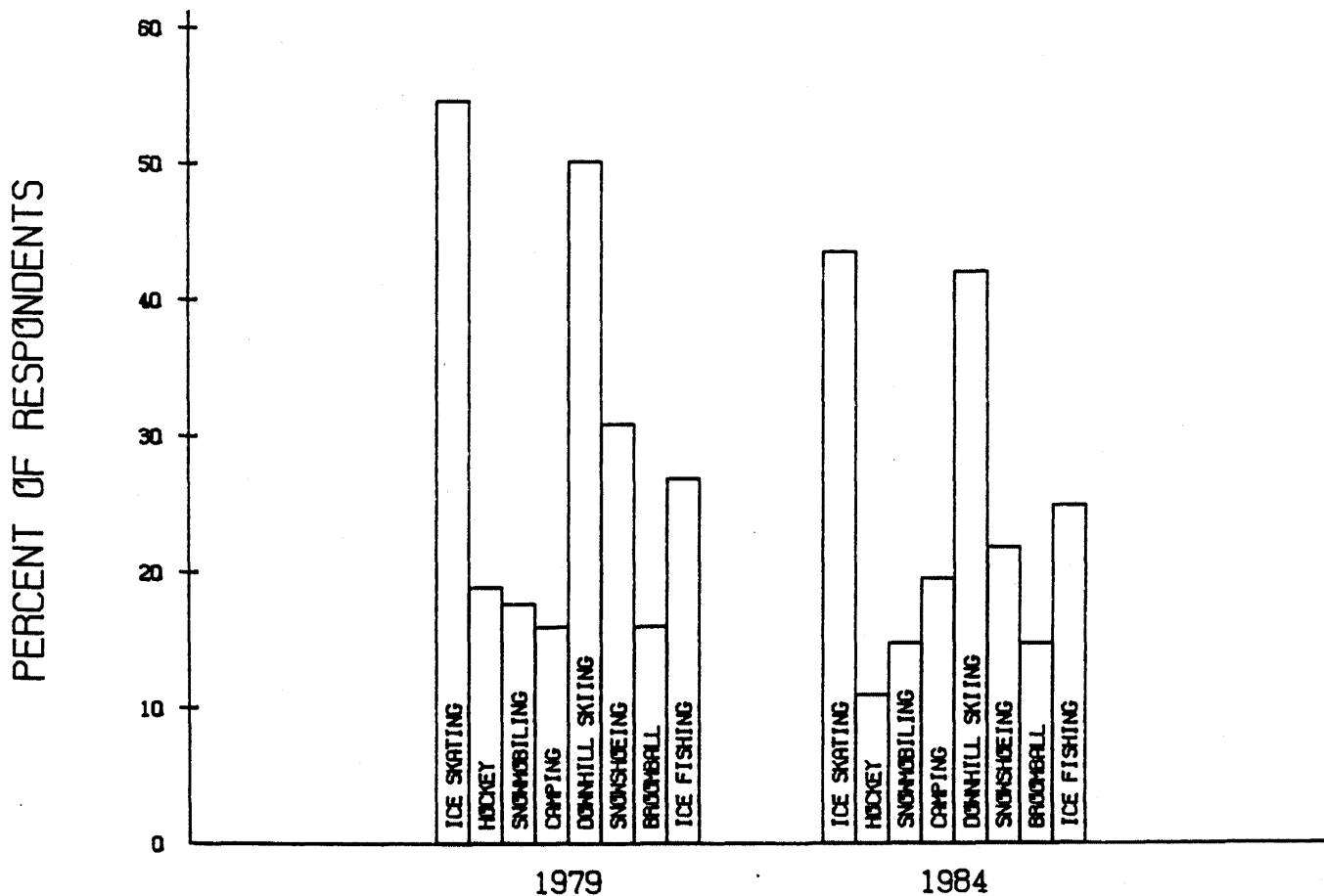
OTHER WINTER SPORT PARTICIPATION

The people surveyed expressed participation in winter camping, snowshoeing, ice fishing, and ice skating (20 percent or more), as well as hockey, snowmobiling, and broomball (less than 20 percent).

The data shows a very slight increase in those who participate in winter camping since 1979. This was the only winter sport to show an increase.

Cross-country skiing is compatible with winter camping and ice fishing in that skis may act as the mode of locomotion for these activities.

FIGURE 13. Other Winter Sport Participation



SUPPORT OF USER FEES

In 1984, skiers were asked if they supported a "user fee" for cross-country ski trails and the amount of money they felt would be appropriate. The 1979 data showed 64 percent supported user fees; 84 percent of those expressing willingness to pay thought \$2 or less was appropriate. As the cost of trail maintenance increased in response to demand, a \$5 user fee was put into effect in 1983 by the Minnesota DNR. In 1984, respondents who thought a fee was appropriate totaled 77.5 percent. Five dollars was thought a fair amount by 62 percent of the respondents with 17 percent feeling \$10 was a fair amount. Support of user fees increased somewhat over the interval between surveys.

FIGURE 14. Support of User Fees for Ski Trails

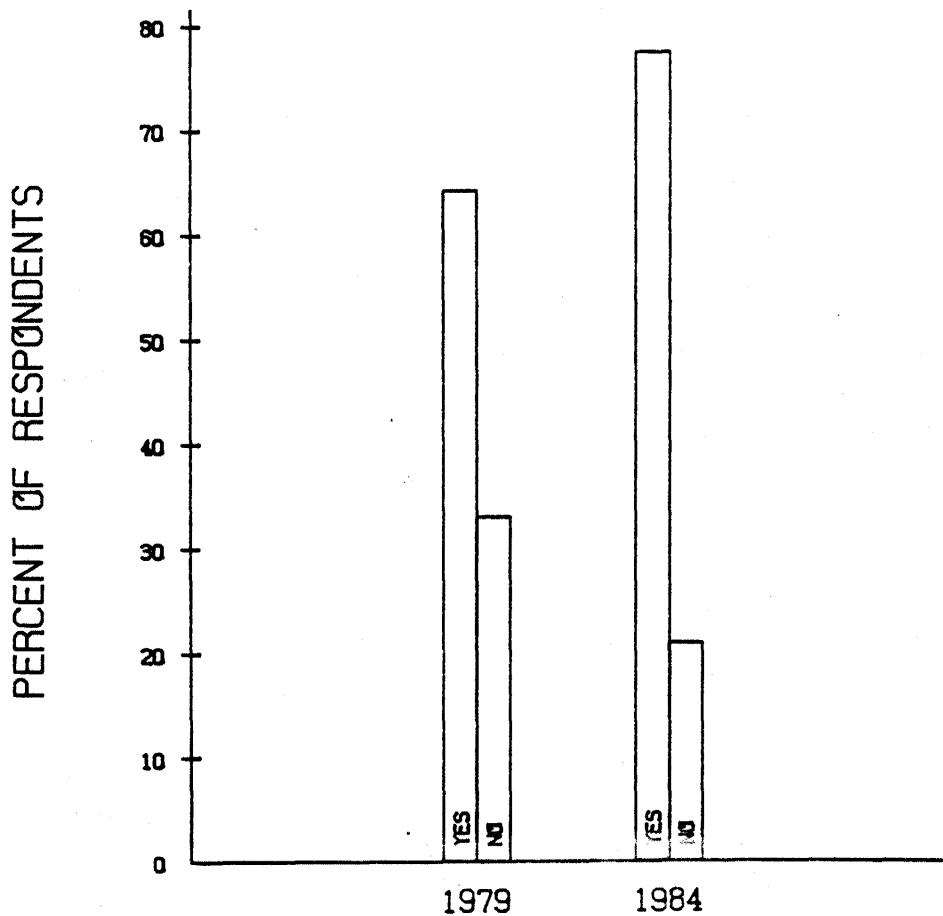
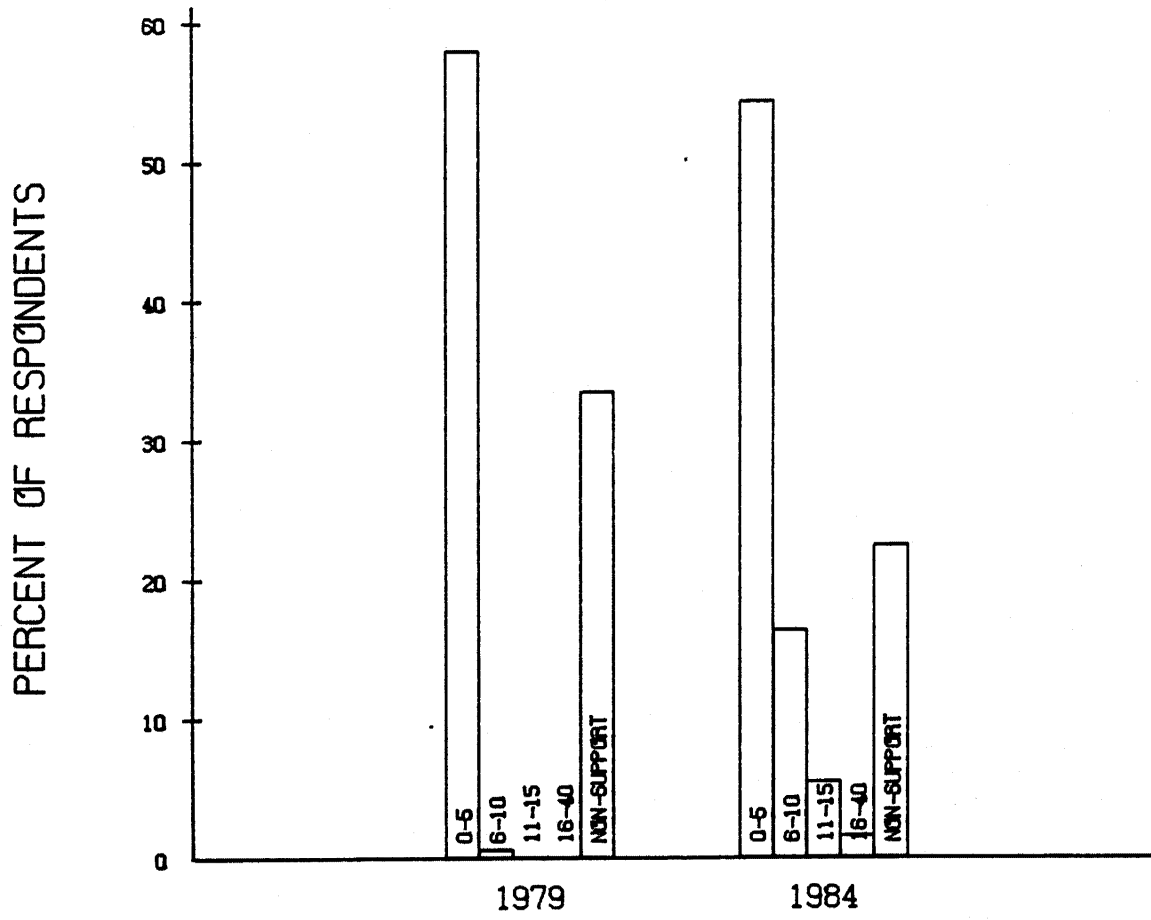


FIGURE 15. Fair Amount of User Fees



SUMMARY AND CONCLUSION

The survey showed that as skill level advances, people ski more, which correlates with the fact that persons who ski most frequently are more likely to belong to a ski club. Beginners ski less than four times per month. Of the skiers interviewed, most thought of themselves as intermediate skiers skiing between four and 12 times per month. Those who thought of themselves as advanced skiers ski more than 12 times per month.

The data has shown that most people are intermediate level in skill, and that persons who ski well, ski more frequently. The data have also shown that most people (66 percent) have not participated in ski clinics.

The utilization of ski clinics, which allows for the development of better ski techniques, would seem to encourage more ski outings. The data show that the persons who classified themselves as advanced in skiing skills skied much more frequently than either beginning or intermediate skiers.

Cross-country skiers surveyed on trails within Duluth were primarily from Duluth, and in most cases lived in close proximity to the trail they most often used. However, the trail skiers used was not necessarily the trail preferred for skiing. Skiers residing in the 55812 zip code, which is in and around Chester Park, used Chester Park ski trails 22.4 percent of the times they skied. The same skiers preferred Spirit Mountain ski trails by a ratio of 35.3 percent to the 23.5 percent who preferred Chester Park trails. Similarly, residents of zip code area 55804, who reside in the area of Lester Park and Lester-Amity ski trails,

use those trails 21.3 percent and 19.2 percent, respectively. However residents of this zip code area prefer skiing at Amity-Lester and Magney-Snively equally as well, 33.3 percent, and prefer Spirit Mountain 16.7 percent to 8.3 percent for Lester Park. Though people ski the trails close to home, most seem to prefer another trail system, with Spirit Mountain being very popular.

Spirit Mountain has been developing and improving its cross-country trails since the 1979 study. Subsequently, 31.8 percent of all skiers interviewed prefer to cross-country ski at Spirit Mountain in 1984 compared to a 3.4 percent preference for Spirit Mountain in 1979. There were fewer 'no preference' responses in the 1984 study. This decrease in "no preference" responses can be attributed to the fact that more skiers have skied more than one trail than had in 1979.

Most skiers interviewed (90.7 percent) own their own equipment. This number has not changed substantially (-2.5 percent) since the 1975 survey.

Calls to cross-country ski rental outlets in Duluth demonstrated that a brisk business in cross-country ski equipment rentals does exist. Most of the business occurs on weekends and may be geared toward those who are learning to ski. Personnel at the shops tend to think that most rentals are used at cabins and places other than trails.

There exists a fairly large percentage of skiers 41-50 years of age, both male and female. However, after age 50 a large decline occurs in the percentage of skiers representing the 51-60 year age group. The percentage of skiers, both male and female,

over age 60 is even less, 2.6 percent for both sexes.

Cross-country skiers are a fairly well-to-do group. The percentage of skiers surveyed increased in the annual income brackets over \$25,000. Income groups reporting an annual income of \$20-25,000 decreased by a significant percentage, as did all other income groups, except for the income category \$0-5,000.

While skiers may report large annual incomes, they spend very little on ski outings. Approximately 70 percent of the persons surveyed spend less than \$5 on an outing. In most cases, this is the cost of transportation to and from the ski site. The percentage of skiers surveyed who spent over \$6, \$15, and \$30 remained constant at approximately 10 percent. The number of skiers spending \$6-14 per outing declined somewhat from the 1979 survey, as did the \$0-5 group, while other expenditure groups increased.

Cross-country skiers who participate in other winter sports show a tendency towards ice skating, downhill skiing, ice fishing, and snowshoeing. The only winter sport to show an increase in participation by cross-country skiers was winter camping: all other sports declined in participation when compared to the 1979 data.

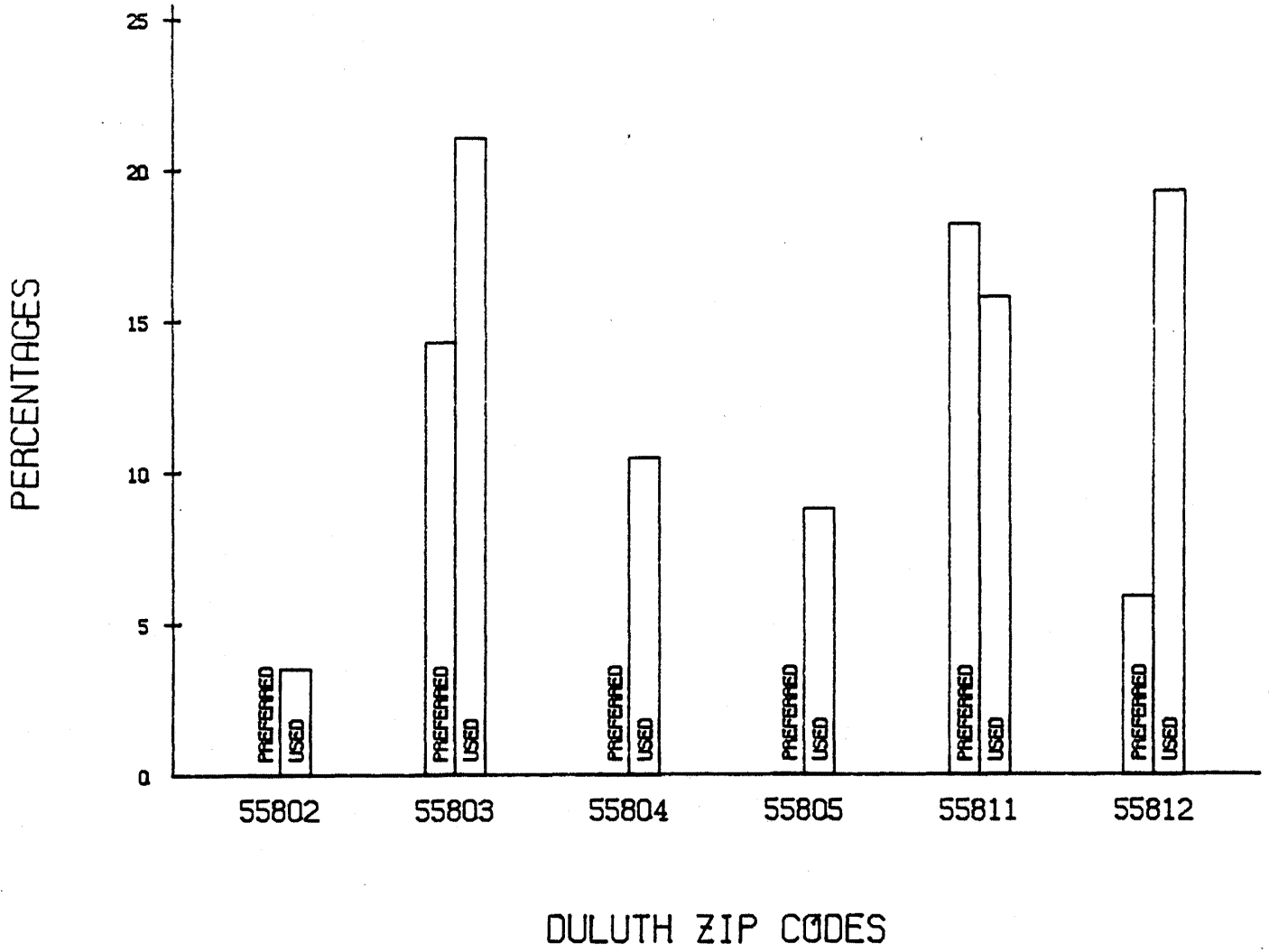
The Minnesota Department of Natural Resources implemented a cross-country ski trail user fee in 1983. The fee was necessitated by the need to generate revenue for trail construction and maintenance. In 1979, respondents to the survey were asked whether they supported a user fee and what monetary amount they thought appropriate. The result was that 64.5

percent of the respondents thought a fee was appropriate, and 84 percent of those responding favorably to a fee felt \$2 was a fair amount. The response in 1984 was 77.5 percent of the respondents supporting a user fee. Of those supporting a user fee, 62 percent thought that \$5 was an appropriate amount, a slight increase in support.

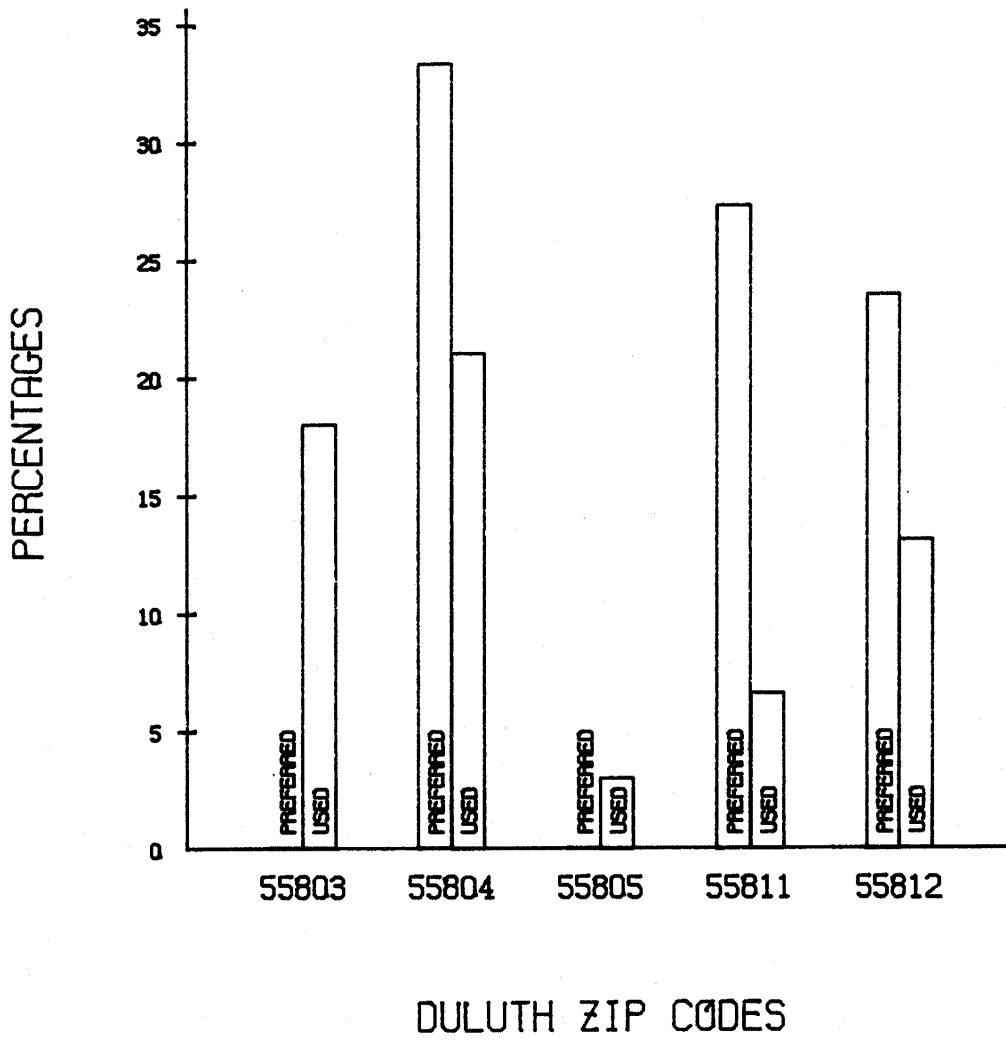
There has not been a change in the residence of cross-country skiers using Duluth trails. Of the skiers interviewed, 64 percent live within the city limits of Duluth.

APPENDIX A
USE AND PREFERENCE COMPARISONS

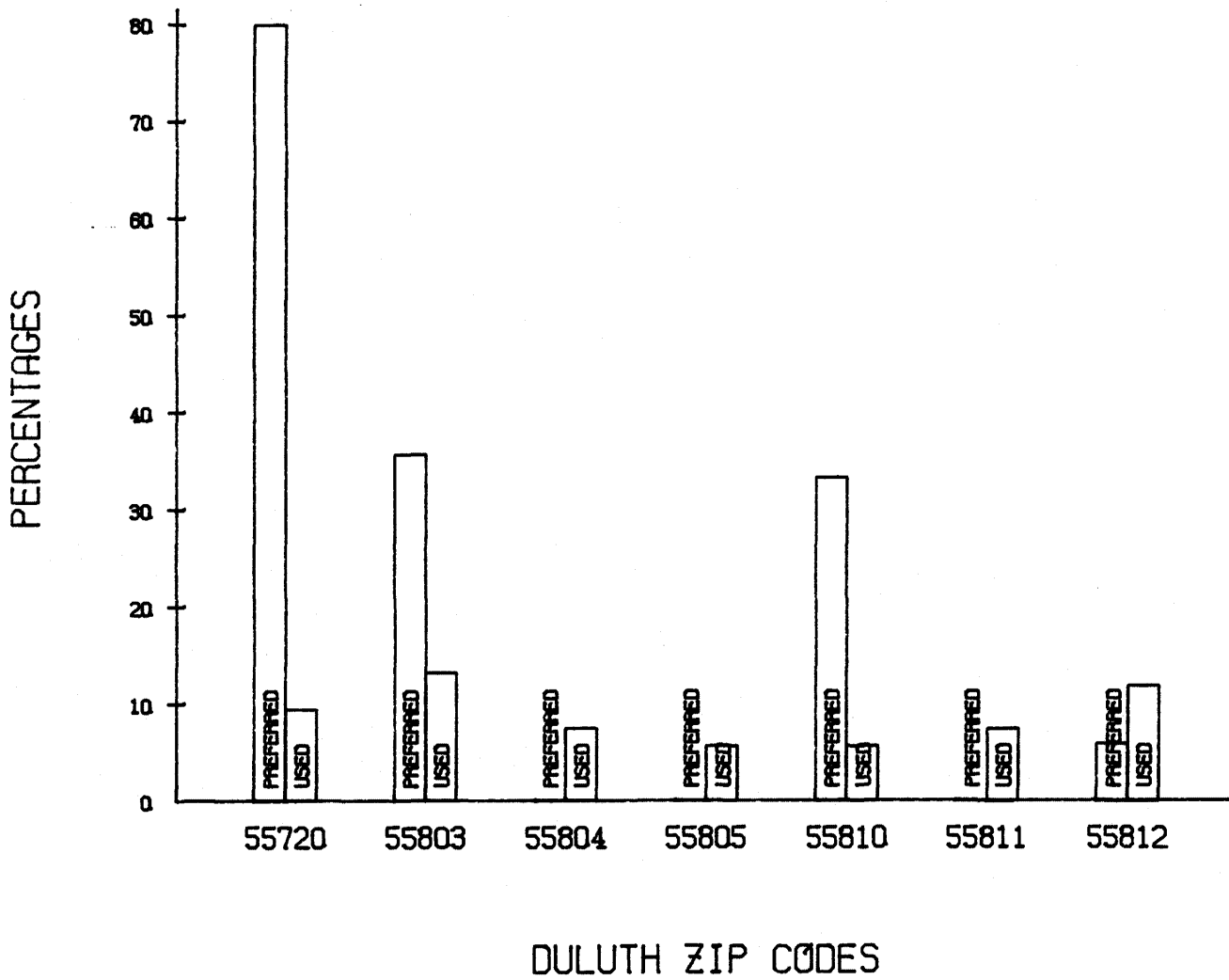
HARTLEY FIELD USE & PREFERENCE COMPARISONS



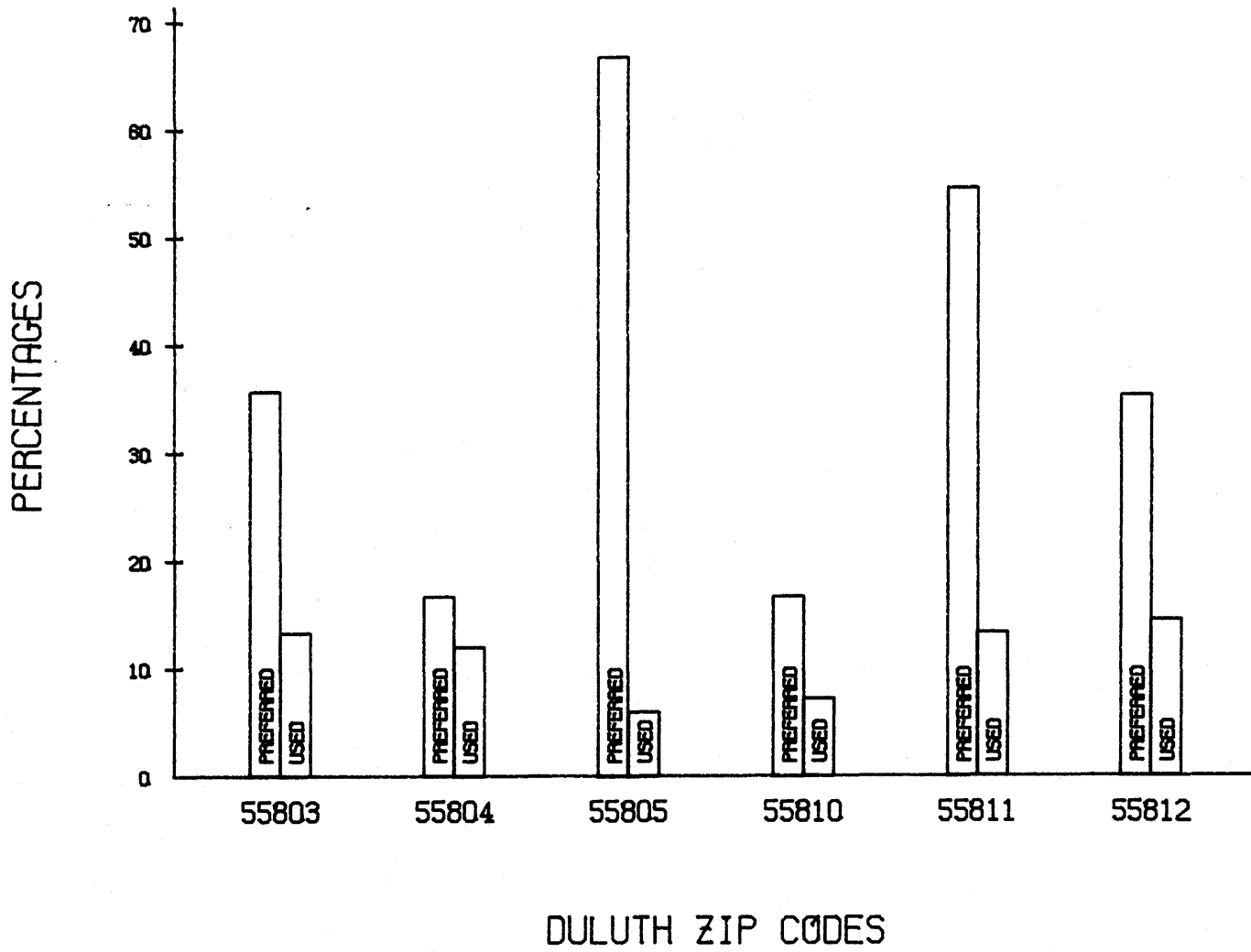
AMITY-LESTER USE & PREFERENCE COMPARISONS



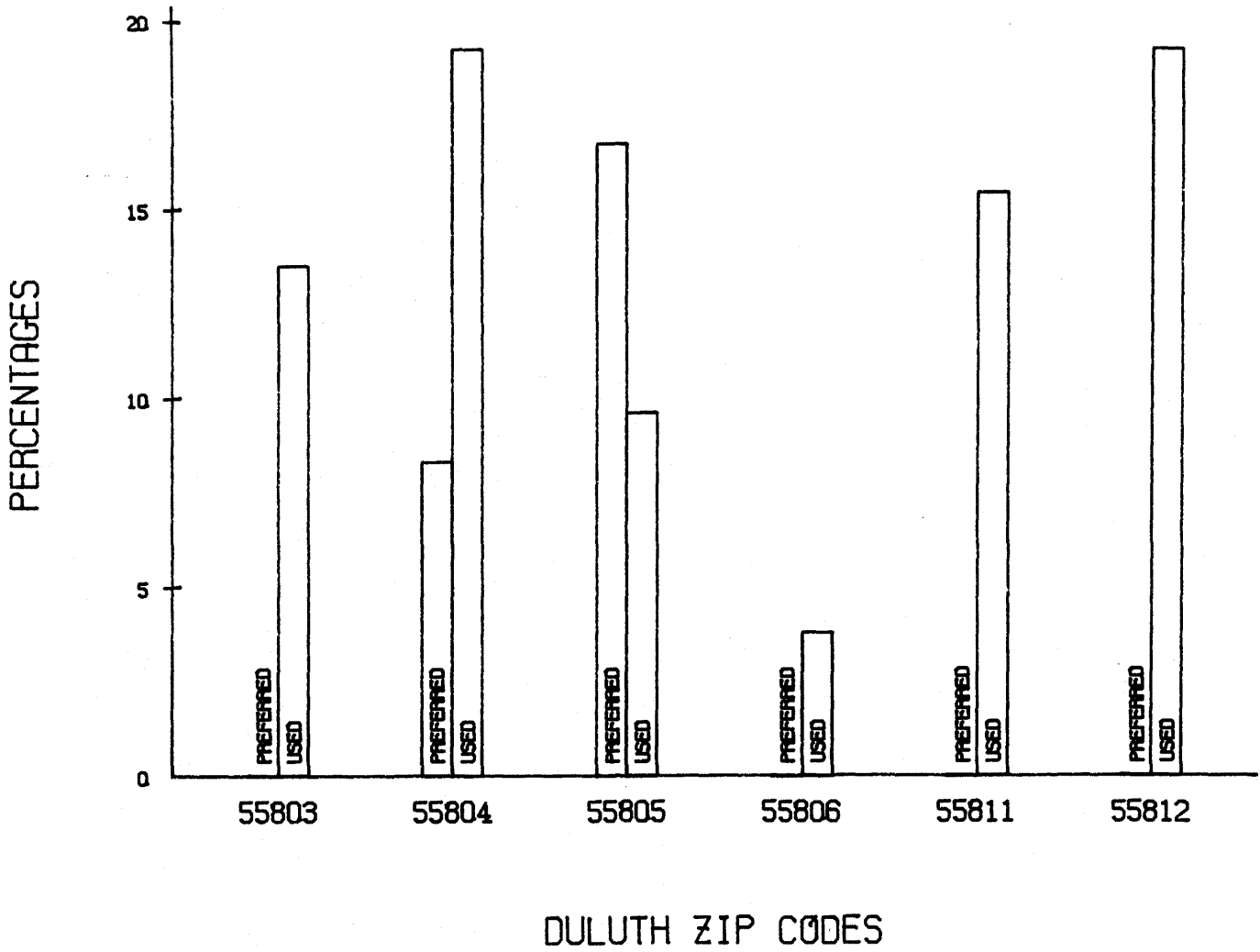
JAY COOKE USE & PREFERENCE COMPARISONS



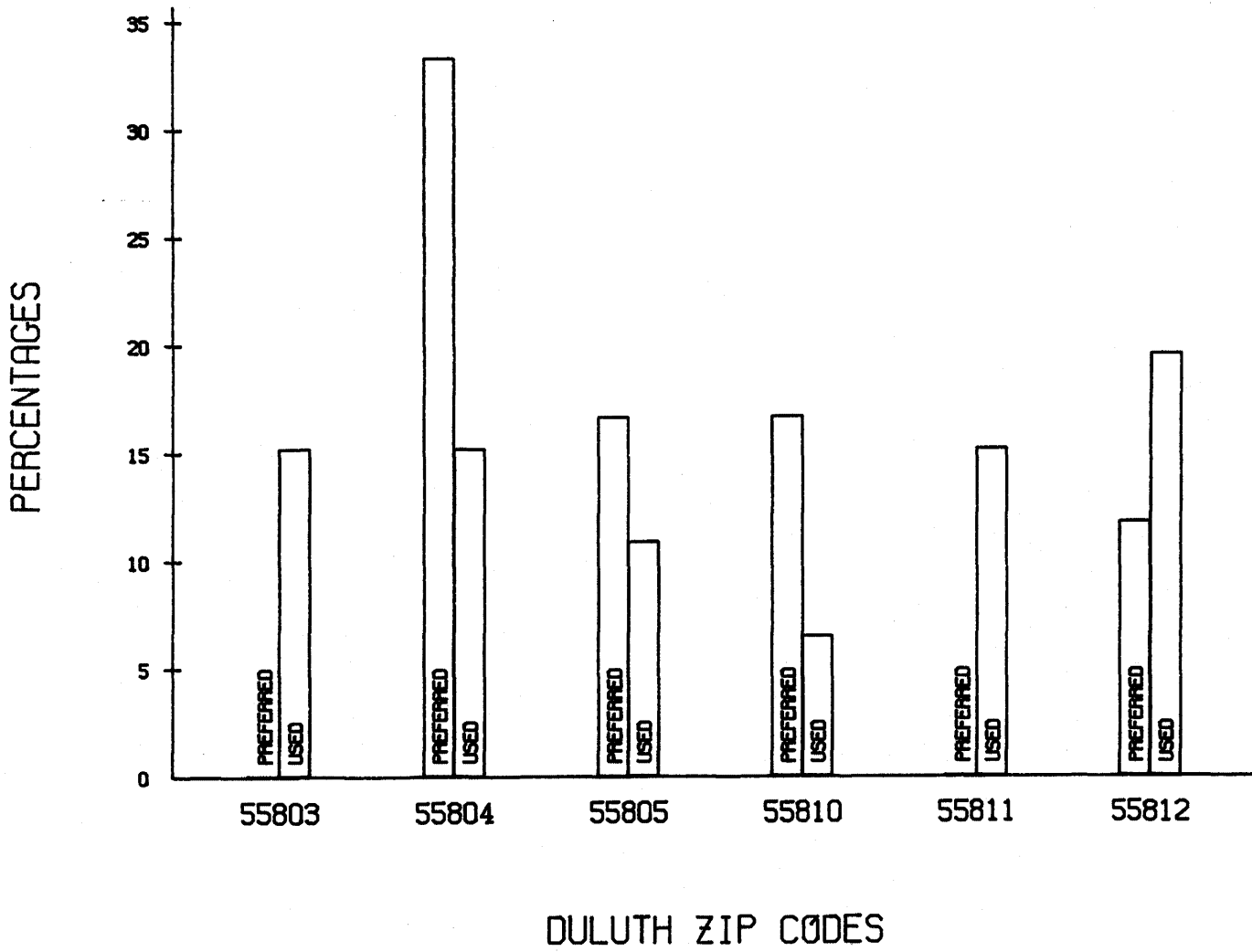
SPIRIT MOUNTAIN USE & PREFERENCE COMPARISONS



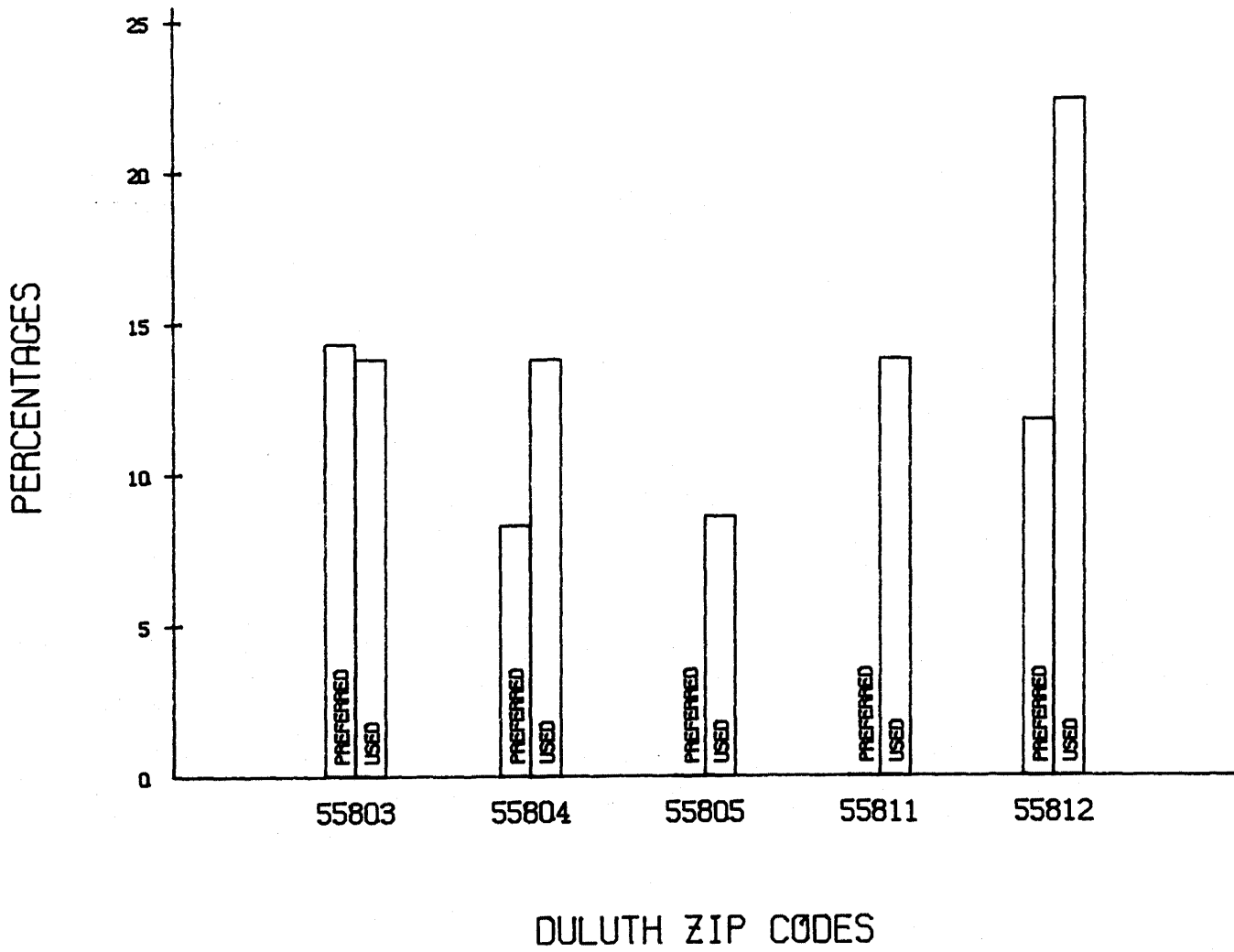
LESTER PARK USE & PREFERENCE COMPARISONS



MAGNEY-SNIVELY USE & PREFERENCE COMPARISONS



CHESTER PARK USE & PREFERENCE COMPARISONS



APPENDIX B
1978-1979 SKIER REPORT SUMMARY

In summary, the 1978-79 survey, which interviewed 179 people, showed that:

1. Sex ratios of male and female skiers was almost even: 50.5 percent male to 49.3 percent female.
2. 64.8 percent of the skiers interviewed skied 5 times or less per month.
3. 15 percent (28 people) of those interviewed were from out of town. Spirit Mountain was used by 19 of these people. Sixteen of the twenty-eight were from Minneapolis/St. Paul.
4. Amity-Lester ski trails were most frequently used (61.4 percent), with 31.8 percent of the skiers interviewed preferring this trail. Other trails and the order in which they were preferred were (in order of decreasing preference): Magney Snively, Lester Park, Hartley Field, Spirit Mountain, and Chester Park.
5. Duluth skiers travel less than 15 miles to ski, with the majority of skiers staying within the city limits.
6. Most skiers were from zip code areas 55804 (19 percent), 55812 (18 percent) and 55803 (14 percent).

APPENDIX C
SURVEY

12. Do you think there is a need for the city to develop and maintain a trail for advanced or racing skiers? Yes No Don't Know Don't Care

13. Which of the following other winter sports do you participate in?

- | | |
|--|---|
| <input type="checkbox"/> ice skating | <input type="checkbox"/> snowshoeing |
| <input type="checkbox"/> hockey | <input type="checkbox"/> broomball |
| <input type="checkbox"/> snowmobiling | <input type="checkbox"/> ice fishing |
| <input type="checkbox"/> winter camping | <input type="checkbox"/> other (please specify) _____ |
| <input type="checkbox"/> downhill skiing | |

14. Starting with yourself, what is the age and sex of each member of your party?

Male

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

 Female

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

15. Which category best represents your gross 1983 annual household income (before taxes)?

- | | |
|---|---|
| a. <input type="checkbox"/> \$0-\$4,999 | e. <input type="checkbox"/> \$20,000-\$24,999 |
| b. <input type="checkbox"/> \$5,000-\$9,999 | f. <input type="checkbox"/> \$25,000-\$29,999 |
| c. <input type="checkbox"/> \$10,000-\$14,999 | g. <input type="checkbox"/> \$30,000-\$49,999 |
| d. <input type="checkbox"/> \$15,000-\$19,999 | h. <input type="checkbox"/> \$50,000 + |

16. Please estimate how much money you spent on today's ski outing (including money spent for transportation, food, entertainment, equipment rental if applicable, etc.) _____

If staying overnight, how much was spent for accommodations? _____

17. Do you or have you in the past participated in cross-country skiing clinics?

Yes No

Please feel free to add any additional comments.

THANK-YOU VERY MUCH!!!