

2020 Economic Summit

November 9 - 11, 2020

**Winter is Coming:
Surviving and Thriving the Pandemic in Mountain Towns**



Housekeeping

- Mics are muted
- Enter your questions on the sidebar. They will be answered at the end of the session.
- Pay Attention!
- We are going to ask you some questions. Polling will give instant results!

Summit Agenda

- **Monday, November 9, 2020 – Conference Kickoff Presented by Visit Sun Valley**

Past Summer & Upcoming Winter Situational Analysis. Things You Need to Know

- **Tuesday, November 10, 2020**

10:00 am – 12:30 pm -REC-reation This Winter: COVID Re-creates Outdoor Recreation

02:00 pm – 03:30 pm – WORKSHOP #1: Stewardship & Mindfulness in Town & the Backcountry

- **Wednesday, November 11, 2020**

10:00 am – 12:30pm -Covid Operational Safety Systems: Innovations for Community Health & Safety

02:00 pm – 03:30 pm – WORKSHOP #2: Maximizing the Dollar Value of the Guest

03:30 pm – 05:00 pm – WORKSHOP #3: Digital Trends for Your Business

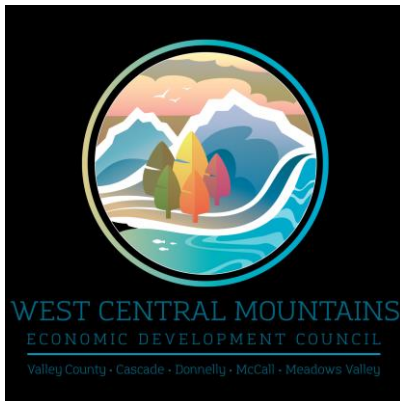
Session Agenda

Time	Presenter/Subject	Title
10:00 - 10:15	David Patrie, SVED	Welcome and Introduction
10:15 - 10:30	Scotty McGrew, Rotarun	Looking Back to Go Forward - Industry Insights and Refreshing the Value Proposition for Your Local Ski Hill
10:30 - 10:45	Ken Rider, Brundage Mountain	On the Hill and Off at Brundage, The Best Snow in Idaho, TM
10:45 - 11:00	Mike Fitzpatrick, Sun Valley Resort	Expanded terrain, Winter Operations at America's First Ski Resort
11:00 - 11:15	Paddy McIlvoy, Backwoods Mt Sports	Winter rec 'off the hill' Gearing up and establishing partnerships
11:15 - 11:45	Zach Crist, Sun Valley Guides	Backcountry operations and safety Using Guide Services to set the standard
11:45 - 12:10	Panel Discussion	Synthesizing on-the-hill and off-the-hill opportunities to provide a fun, unique and safe winter experience
12:10 - 12:30	Q & A	

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VISIT **SUN VALLEY**

THE CHAMBER
HAILEY & THE WOOD RIVER VALLEY



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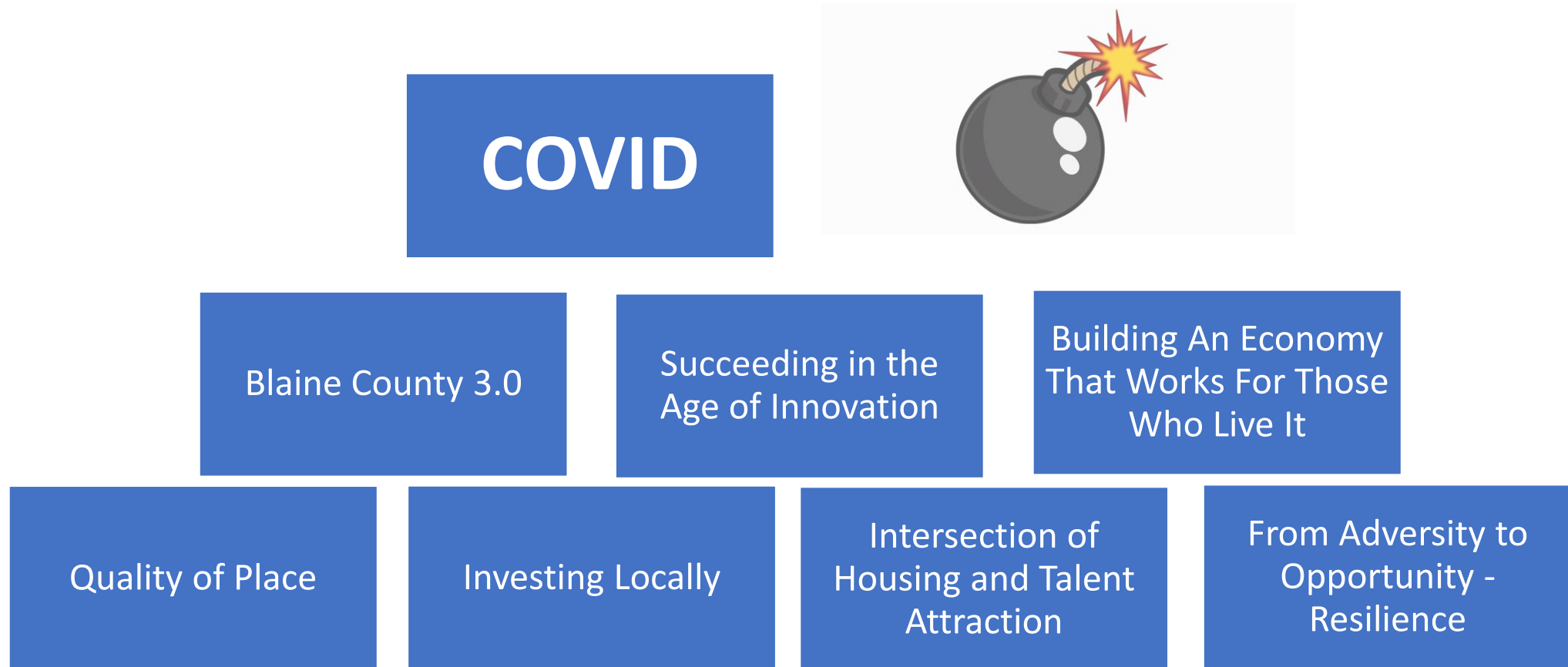
Community Partners



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Annual Economic Summit Goes Digital in Year 9



Adaptation: A change in structure, function, or behavior by which a species or individual improves its chance of survival in a specific environment.

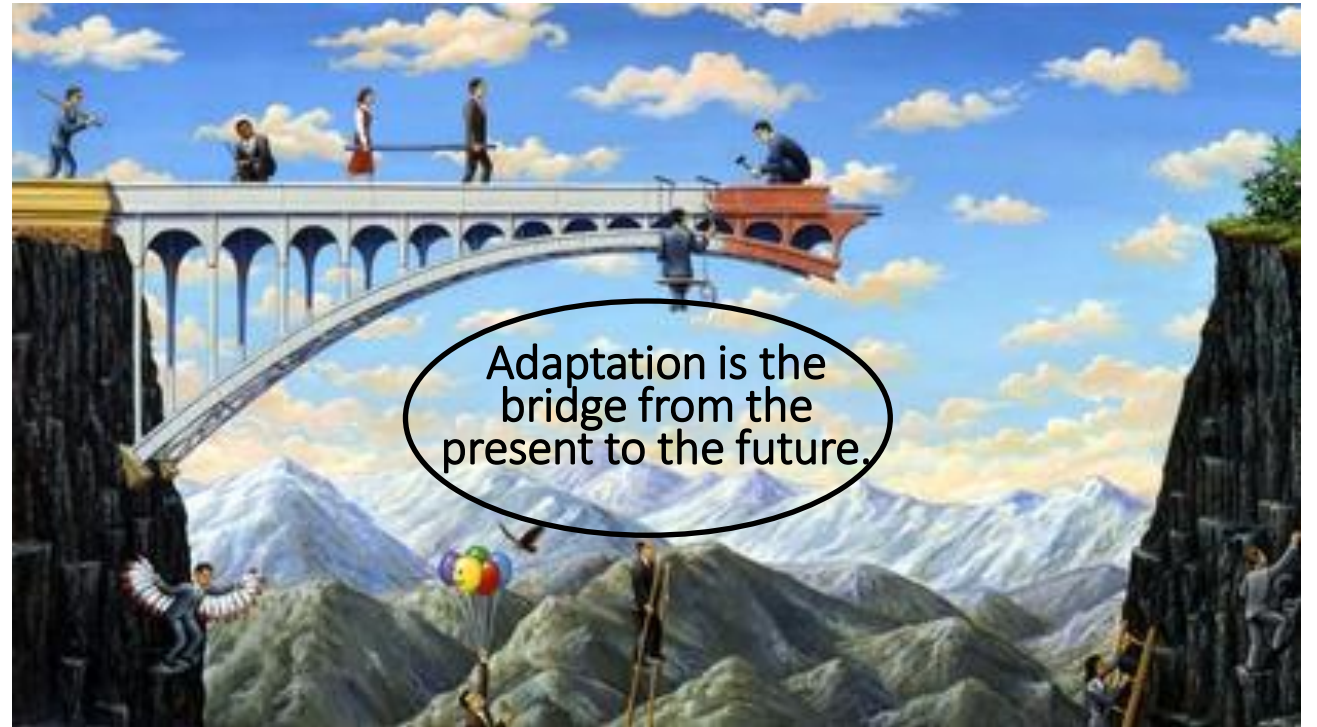
“It is not the strongest of the species that survives, nor the most intelligent. It is the one that is most adaptable to change.”

~Charles Darwin~

“The measure of intelligence is the ability to change.” ~Albert Einstein~

“Communities are like species. Each time we fail to adapt, we make ourselves less resilient and more susceptible to outside shocks.”

~Unknown~



2020 Economic Summit

Tuesday, November 10, 2020

REC-reation This Winter: COVID Re-creates Outdoor Recreation



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Polling Questions

- Do you plan to recreate more or less this year?
 - More
 - Less
 - About the same as last year
- Where do you recreate most?
 - On Mountain - Lift Serviced
 - Nordic trails
 - Backcountry - ski, snowshoe, etc.
 - Indoors / Gyms, etc.



Scott McGrew Rotarun & SVSEF



Looking Back to Go Forward:
Industry Insights and Refreshing the Value Proposition for Your Local Ski Hill



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Topics

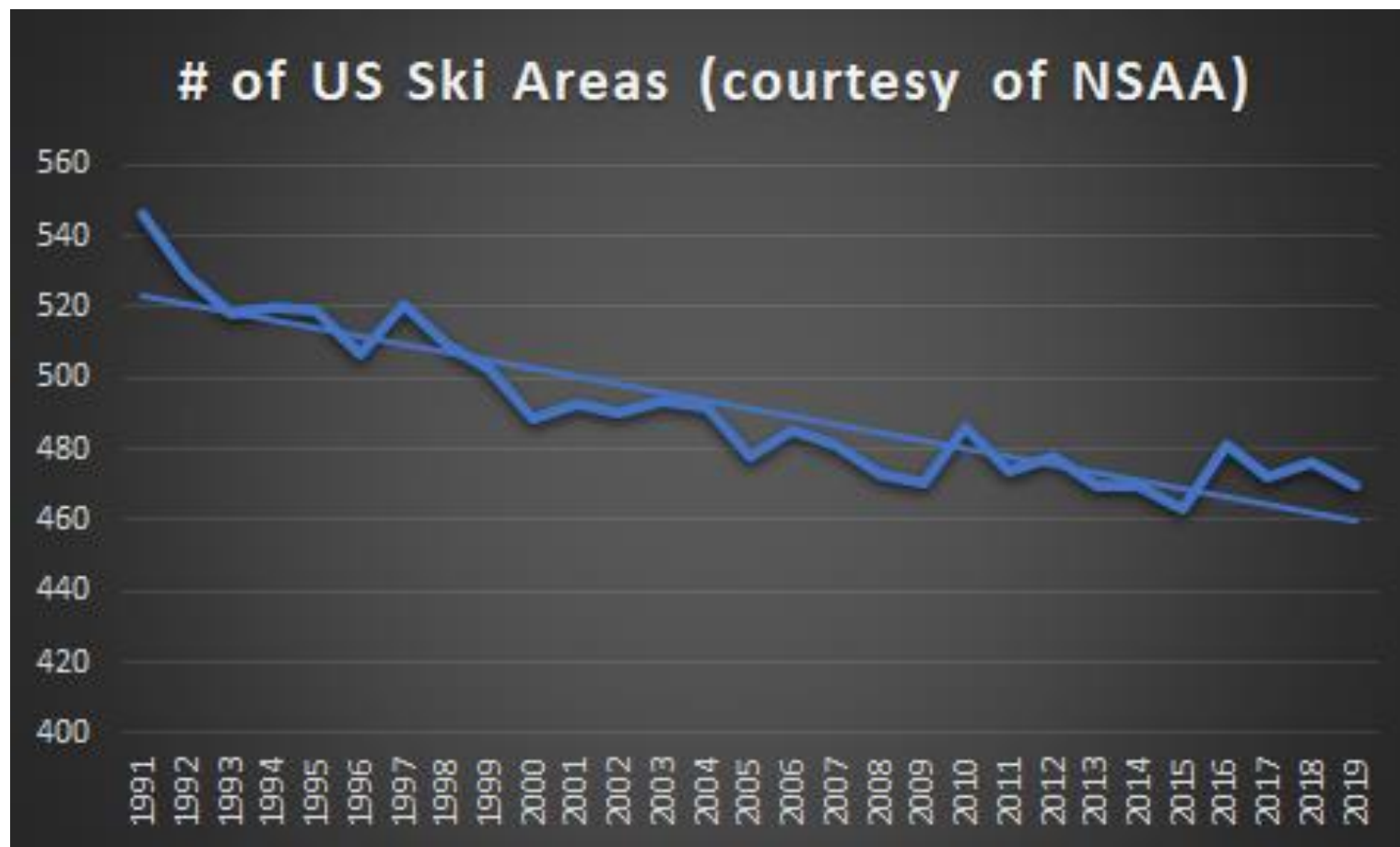
- 80 years of history in 2 minutes
- Industry Insights... Why community ski hills matter
- Value Proposition – focus on the ecosystem
- Lessons from the Ice Rink – updated approach towards a less traditional business model
- The arc towards sustainability – branding, partners, and inspiring demand
- Capital investment summary and horizon projects
- The Economics



Rotarun – 80 years young



- Established in winter of 1940-1941 by ski pioneers Jim Hurst, Bob Jackson and Bill Mallory.
 - Built the first tractor pulley rope tow.
- 1948 Swiss Olympic skier Janett Ann Winn when she started to teach local kids how to ski
- 1958 – ski hill coined 'Rotarun' after the Hailey Rotary Club
- 1964 – Arkoosh Family established Rotarun Ski Club 501 © 3.
 - First top to bottom J Bar installed and warming hut built.
- 1966 – Arkoosh family donates Rotarun land to Blaine County with a 99 year lease.
- 2001 - Replaced JBar with Doppelmayr Poma Lift taken from Austrian town hill.
- 2017 SVSEF takes over ski area management. Maintains ski area as a separate non-profit organization.
- 2019/20 – snowmaking and grooming infrastructure installed
- 2020 – Rotarun presents at annual SVED conference

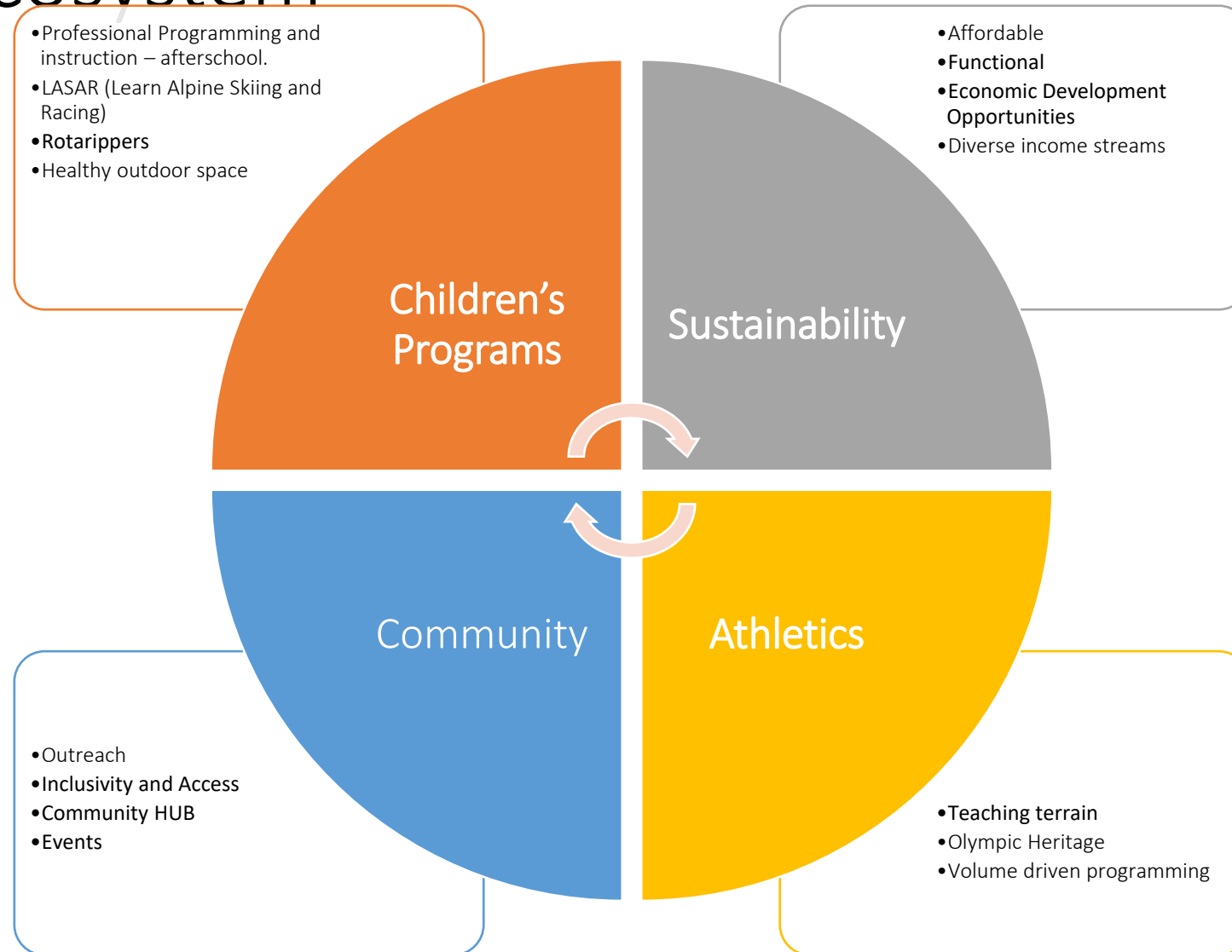


Industry Insight

- In the United States, up to 150 ski areas are failing to thrive and may not survive more than 5 seasons. That represents over 30% of the current industry. Top reasons include minimal investments, no destination traffic, and a reliance on natural snow. (Curbed)
- 4 of 5 beginner skier and riders do not continue with the sport. (20% conversion rate for the Industry)
- Millennial and Gen Z participants ski and ride less than prior generations. "It takes two millennials to replace a baby boomer"
- As daily ticket prices go up, and revenue yields go down, beginners are losing footing.

Facts/stats courtesy of NSAA

Our Value Proposition – Focus on the Ecosystem



Lessons from the Ice Rink – a fresh look at management strategies for a community ski hill

- Established operating times based on user groups.
- Approved hours targeted to best meet community need and opportunities.
- Minimize expenses while maximizing impact and accessibility.
- Nimble operations with ability to adapt.
- COVID primed. "the only thing we offer is a singles line"





B.



C.



Relationships are the Foundation

- Blaine County
 - Recreational Master Planning
- Sage Springs Homeowners
 - Strive to Bring value.
 - Fire mitigation, improved trail head parking. Landscaping and site improvements. Tidy operations.
- Building a broad Partner base
 - SVSEF
 - Kids Mountain Fund
 - Local Business owners and Ski Shops
 - Wood River Fire and Rescue
 - Galena Backcountry Patrol
 - Hunger Coalition
 - South Valley hotels
 - Blaine County schools
 - St. Lukes Foundation
 - Sharewinter Foundation
 - Sun Valley Company







The arc towards sustainability – infrastructure matters





Phase 2 – System completion, uphill capacity, and grooming investments

- Finalizing \$550,000 Phase 2 Campaign
- Full snowmaking system installation
- Installation of the original rope tow line
- Winch cat acquisition
- Lodge improvements
- Landscaping improvements and parking lot re-grade.

Project Summary and Horizon Funding Needs

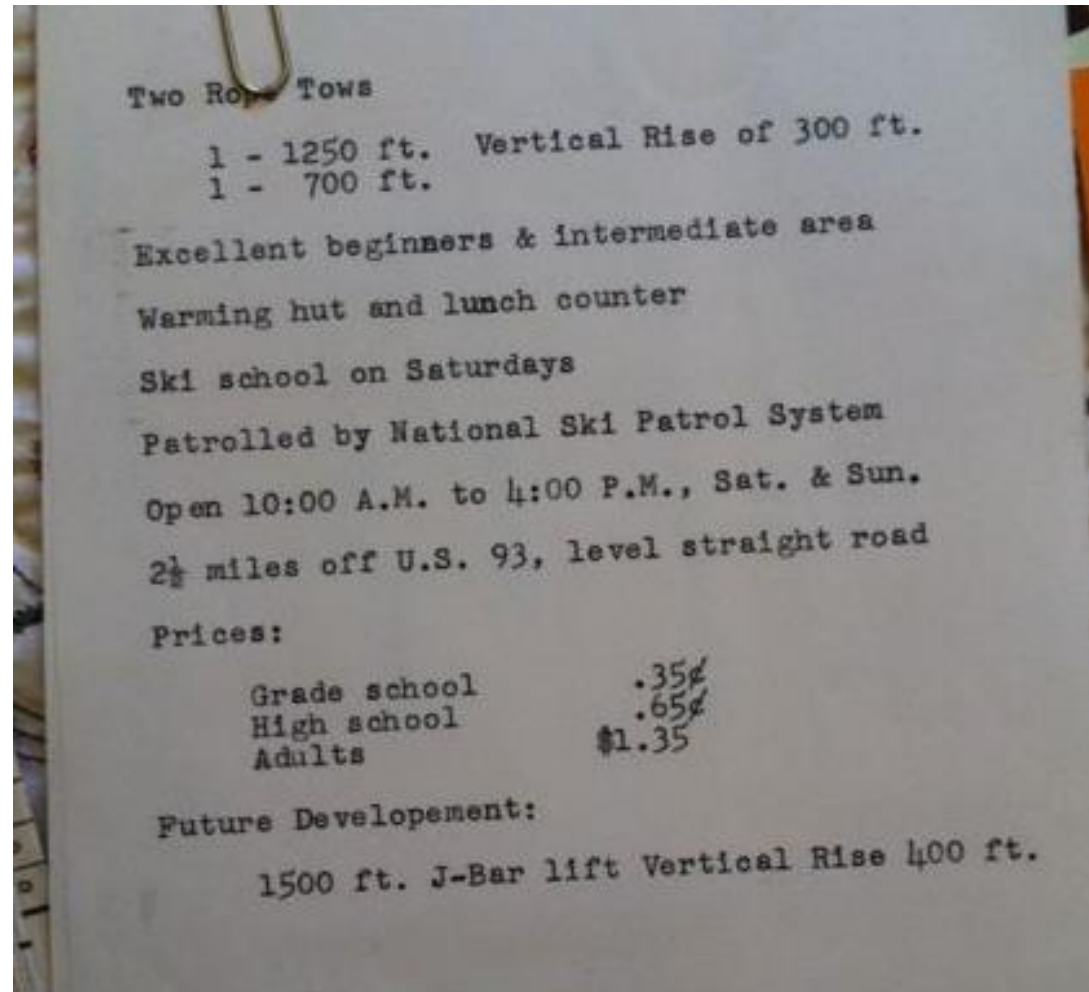
Project Summary - Complete Snowmaking and Grooming	Cost
Phase 1 – Infrastructure. Well, waterworks, planning and engineering	\$200,000
Phase 2 – Initiate system. Pump and motor installation.	70,000
Phase 3 – Install total system. Electrical, hydrants, waterworks, pumphouse	\$235,000
Snow gun purchase (x1) <u>Snowgun – lease to own (x2)</u>	\$45,000
2016 <u>Prinoth</u> Snow Groomer	\$100,000
Total Cost for Core Snow making Project	\$650,000

Snowmaking and Grooming - Remaining Capital Needs	Cost
Snow Gun - Standard SMI Pole Cat (x2)	\$35,000
2016 <u>Prinoth</u> Snow Groomer with Winch - balance due	\$100,000
Total Future Capital Funding Need	\$135,000

Horizon Funding	Cost
Grooming equipment and maintenance Garage	\$60,000
Lighting Upgrade Metal Halide to dark sky and energy friendly LED technology	\$30,000
Lodge Renovation and Commercial Kitchen	\$150,000
Total Horizon Capital Funding Need	\$240,000

A focus on economic impact – multipliers at work

- Local traffic. Creating compelling reasons to get out.
- Employment opportunities
 - 15 employees in 19/20 winter season
- A focus on local companies and contractors for capital improvements.
- Developing partnerships with hotels in the south valley.
- Event production and execution.
- COVID proofing – continued operations with a focus on limiting density and keeping our community safe.
 - Rotarun is uniquely qualified to hit the marks.
- Mental health matters



Thank you



Ken Rider Brundage Mountain



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Brundage Mountain Resort

“The Last Great Place” and “The Best Snow in Idaho”

“It’s in Idaho. At a mountain called Brundage. Where the snow falls in abundance...and the faint pulse of the ski culture your parents wax nostalgic about can still be felt.”

Skiing Magazine - 2016

Brundage Mountain Resort

- 1,920 lift accessed terrain
- 3,300+ acres of permitted terrain
- 6 lifts
- 64 named runs
- 340" of snow
- 18,000 acres of snowcat skiing terrain
- Endless miles of snowmobile terrain for guided tours & rentals
- Opened in December of 1961

Recent News

- DeBoer family transitions ownership to local Idaho Group
- New group led by Bob Looper, Brundage Board President
- All have strong ties to Idaho and McCall area
- Many have been long time season passholders
- Still independent and family owned
- Positions resort for future growth while maintaining the vision of a friendly, family-oriented resort

Covid Plan

- Summer beat all expectations
 - Communicate early and often with employees and guests
- Preparing for Winter
 - Re-envisioning every experience with the focus of reducing risk for staff, guests and community while still providing a great experience
- Some Winter Assumptions
 - Planning on more regional visitation
 - Increased population in McCall (Second Homeowners deciding to stay for winter)
 - Planning on more mid-week visitation
- Capacities
 - On-Mountain not the problem
 - Pinch point identification and planning

Remember that Nostalgic Ski Culture...

Indoor capacity challenges & solutions

- F&B outlets all reduced to 40%-50% of occupancy
- Limiting access
 - No 'hanging out inside'
- New outdoor lockers
- New outdoor spaces with firepits
- New outdoor 'Grab-n-Go' food options
- New/additional 'mobile' trailer bathrooms
- New employee locker room trailers
- Additional parking capacity added

Mike Fitzpatrick

Sun Valley Resort

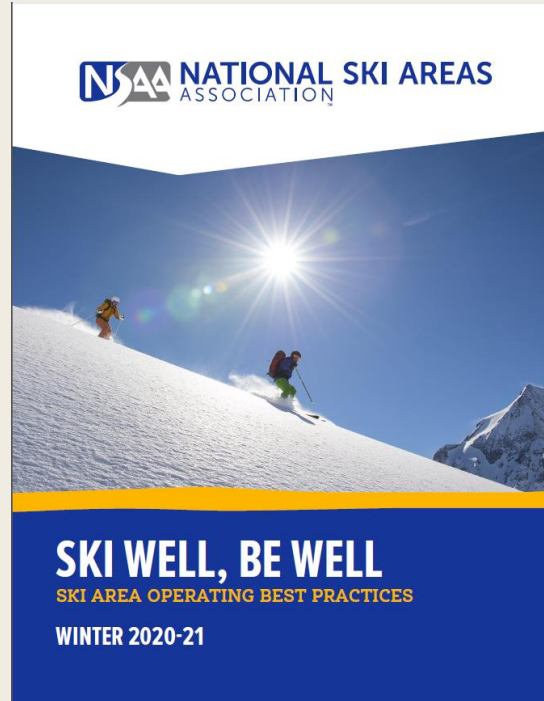
Expanded Terrain & Winter Operations at
America's #1 Ski Resort



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WE ARE A COMMUNITY

Skiers and riders share many things: a love of the mountains, the feeling of freedom when cruising down runs, and making memories with family and friends. We are explorers. We are first-timers. We are powder chasers. We are first chair riders at our local hill. No matter who you are, we are all part of the outdoor community.

So let's be kind to one another. Respect yourself and others. Know that the actions we all take can affect our community. This is the contract of skiers and riders: take care of the environment, take care of yourself, take care of each other.

SKIING AND SNOWBOARDING: Recreation with a low risk of transmission



Ski areas have hundreds of acres of wide open spaces



Ski lifts allow for constant airflow as they travel, with rides lasting an average of 7 minutes



Skiing and snowboarding gear keeps faces and hands covered



Skiers and riders show respect by leaving space between each other on the slopes.



Recreation is proven to improve mental health and physical wellness

SKI WELL, BE WELL

LET'S WORK TOGETHER TO BE THE REASON WE HAVE A SEASON.



Covid-19 Protocols

Practice social distancing

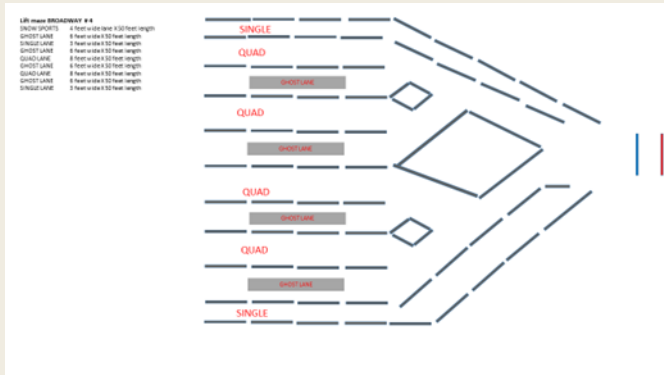
- Get ready for the day at your vehicle.
- Lift lines and loading will be different.
- 6' from those who are not with your group.
- Seating capacity at all mountain lodges and restaurants will be reduced.
- Reservations will be taken for the Roundhouse and Averill's.

Face coverings are mandatory

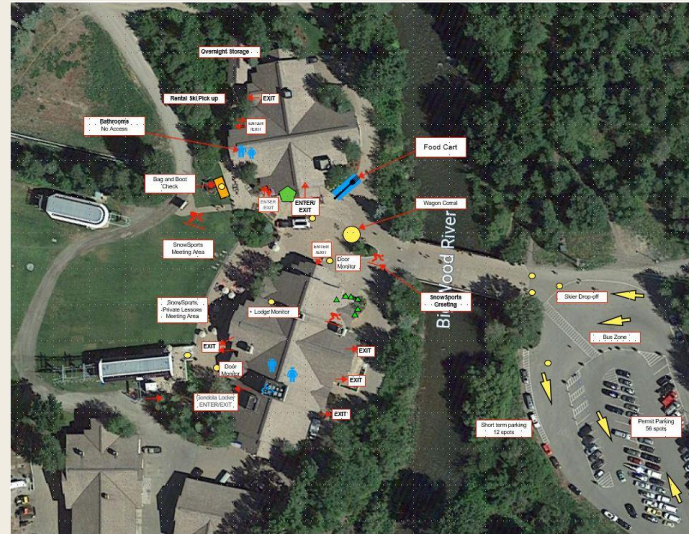
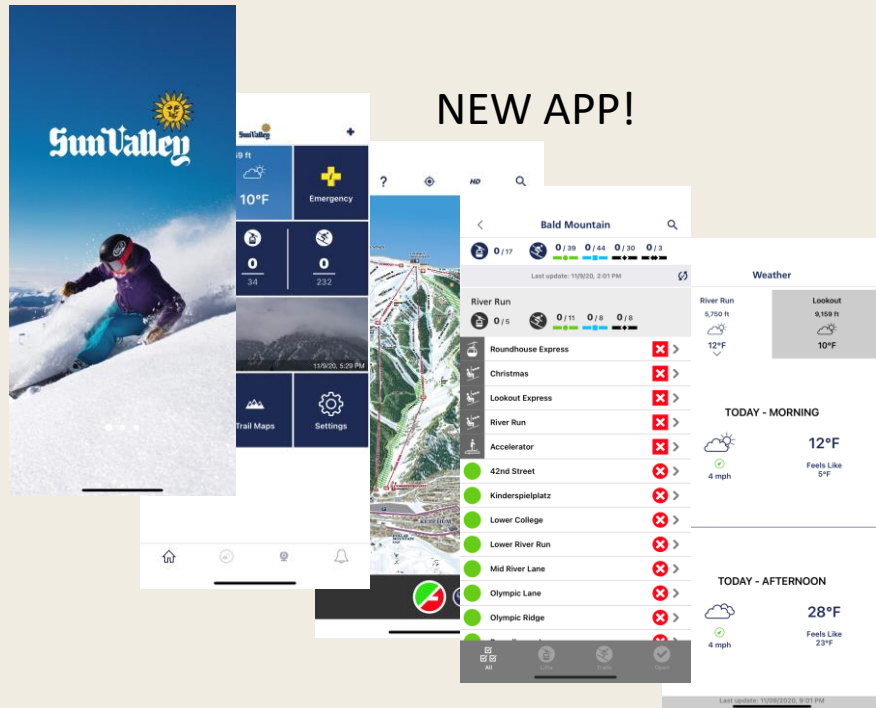
- Lift Lines.
- Loading and unloading chair
- Inside all buildings except while eating or drinking.
- Outside when social distancing cannot be maintained.
- During all SnowSports lessons and programs.

Cleaning & Hygiene

- Employees health checked and recorded daily.
- Quarantine protocols in place.
- Continual disinfecting of public areas and surfaces.
- Employees must have face coverings when dealing with guests and other staff.
- Bags, Packs and personal items can be stored in safe, secure and sanitary bag check.



WHAT'S NEW at SUN VALLEY



Sunrise



380 acres of new terrain, the largest in the country for this season.
Includes, bowls, glades, chutes and a 4200' extension of the Broadway Run.
Broadway lift rises almost 1600 vertical feet and extends for over a mile.
Another 25 snow guns on the Broadway extension assure early season skiing.

**OH YES,
ONE
MORE
THING...**



<https://youtu.be/f8FA3Jy83Mc>



Paddy McIlvoy

Backwoods Mt. Sports

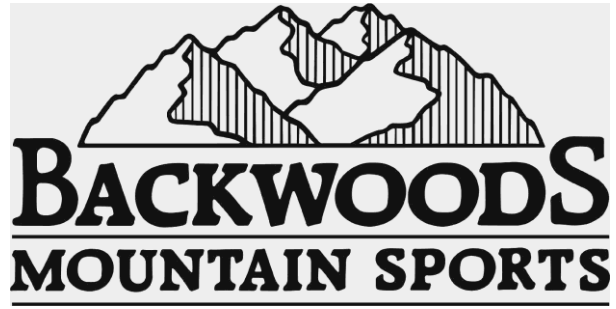
Wild Snow:

Gearing Up and Forming Partnerships for Recreation Beyond the Resort



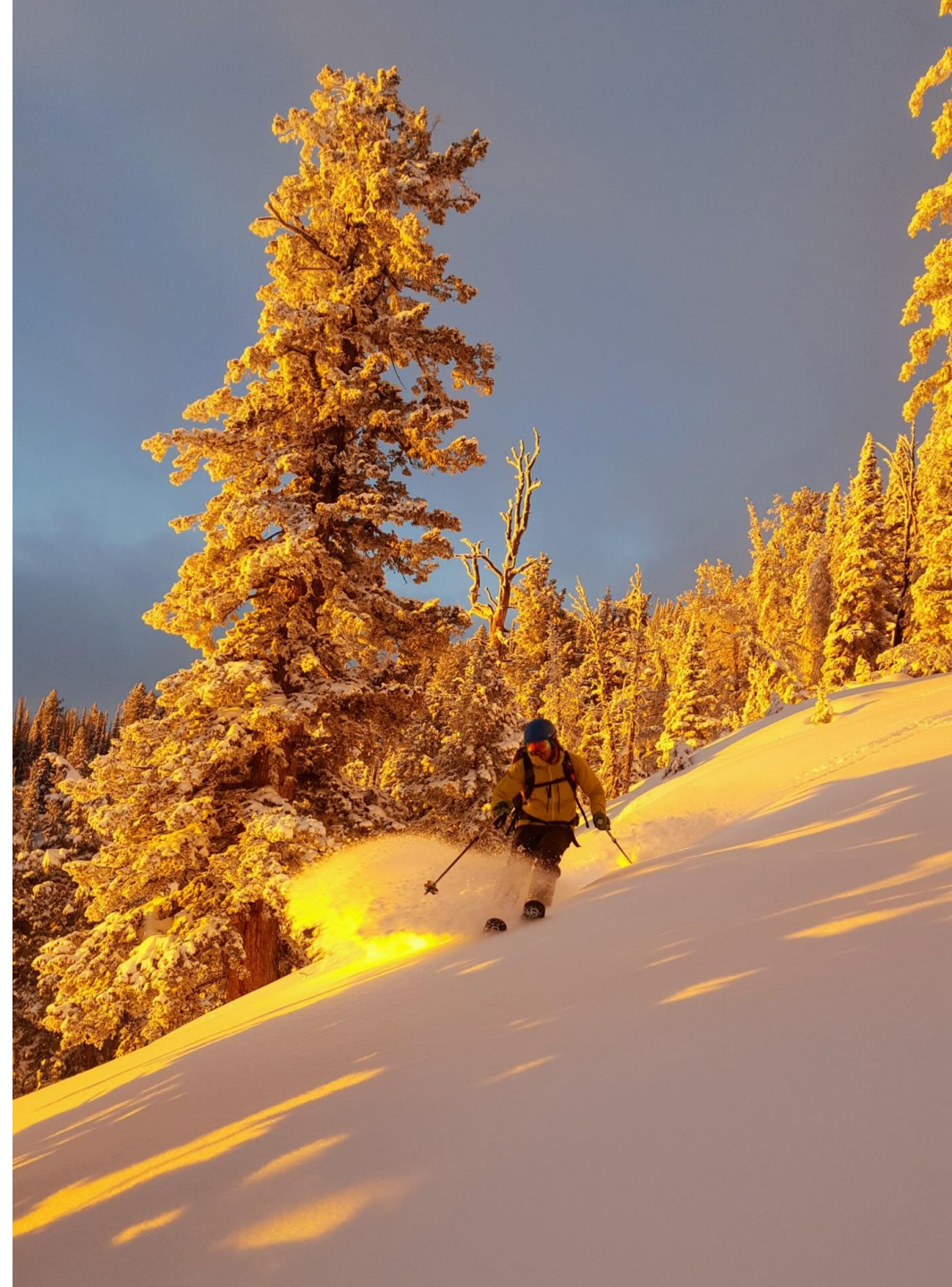
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Wild Snow

Gearing Up and Forming Partnerships for
Recreation Beyond the Resort



Responsibility and Opportunity



Starting Early





Embracing Partnership

Zach Crist

Sun Valley Guides

Backcountry Operations & Safety:
Using Guide Services to Set the Standard



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SUN VALLEY GUIDES

LEAVE NO TRACE

What is Leave No Trace

LNT is a non profit designed to educate people venturing into the outdoors about how to minimize their impacts on the natural resources (public lands).



Redfish Lake overcrowding - summer 2020

Why is it so important?

- Increased backcountry users
- Crowded trailheads and trails
- New users
- Increased accidents/rescues
- More trash and potential for infected water sources



Redfish Lake Shuttle - summer 2020

Plan Ahead and Prepare

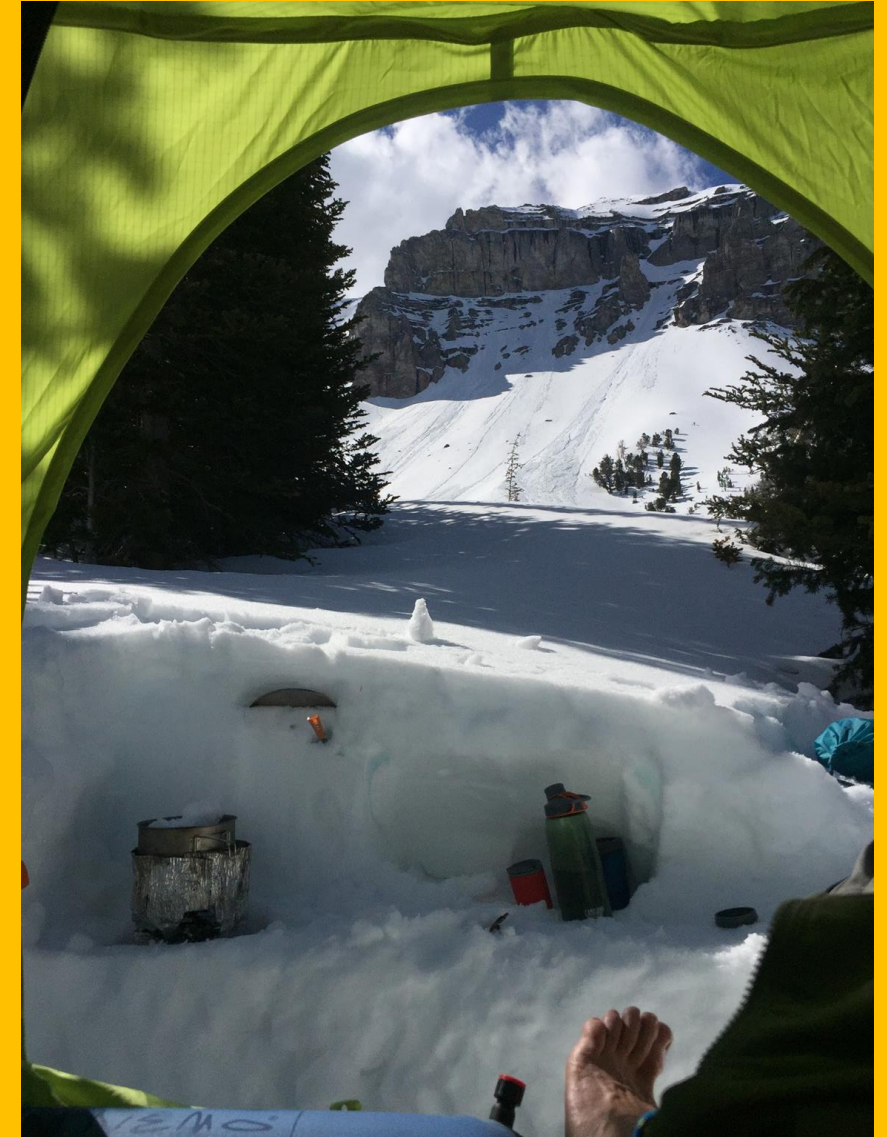
- Check the avalanche advisory bulletin
- Be prepared for bad weather and self-rescue
- Route planning
- Beacon, shovel, probe
- Educated on how to travel in the backcountry



SVG Level 1 course learning to

Travel and Camp on Durable Surfaces

- Use previous skin tracks
- Camp out of run out zones, away from cornices, or other hazards
- Set up tent away from high use areas
- Camp 200' away from streams and lakes (protect water sources from contamination)



Campsite on a ski traverse of the Lost River

Dispose of Waste Properly

- Pack It In, Pack It Out!
- Take out all food scraps and trash
- Take out solid human waste and toilet paper (wag bags)
- Dismantle all snow shelters and naturalize area before leaving campsite



Leave What You Find

- Leave rocks, plants, wildlife, historical or cultural artifacts the way you found them
- Let nature's sounds prevail. Keep loud voices to a minimum.
- Take pictures, Leave only footprints.



Minimize Campfire Impacts

- Campfires cause lasting effects on the environment
- Use a backcountry stove instead
- Use only down dead wood for fires and put them out. Spread cold ashes.
- Down break limbs off trees (habitat for wildlife)



Respect Wildlife

- Winter is a vulnerable time for wildlife - difficult to travel and no sufficient food sources
- Observe wildlife from a distance and avoid when possible
- Protect wildlife, by storing your food securely



Be Considerate of other Visitors

- Be respectful of others
- When stopped, don't block the trail
- Separate skin tracks from bootpacks or snowshoe tracks
- Traverse slopes in one track
- Pick up waste after your pets (especially in the skintrack)
- Lower group size or choose less traveled terrain



Photo Credit: Jay Goodrich

Be Considerate of other Visitors

- Don't ski down over other groups ascending the slope
- Use established skin tracks and make them use-able for the future (low angle tracks)
- Be equipped for self-rescue (lower impact of emergency responders during pandemic)



We're here to Help

- Educate users on backcountry etiquette
- Provide avalanche education



- Instruct users on how to use their gear properly and travel in the backcountry
- Provide rescue courses

2021 COURSE SCHEDULE



RECREATION LEVEL 1

SUN VALLEY GUIDES

Dates: January 9-10; January 16-17 (SOLD OUT); January 30-31; February 13-14; February 27-28; March 6-7

Rates: \$490 per student | 5:1 ratio | min 5 | max 10

AVALANCHE RESCUE

Dates: January 2; January 18; February 1; February 15; March 1; March 8

Rates: \$160 per person | 5:1 ratio | min 3 | max 10

BACKCOUNTRY RESCUE & WILDERNESS SURVIVAL

Dates: February 16

Rates: \$160 per person | 5:1 ratio | min 3 | max 10

Where do we go from here?



Short Term



Long Term

Preview for Tuesday and Wednesday

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