Welcome to SIA's Monthly Retail Reports!

From November through May, SIA, in partnership with The NPD Group, will be providing top line snow sports retail data that includes alpine, nordic, snowboard and outerwear and spans snow specialty, snow chain and snow internet — collectively called the **SIA US Snow Industry Retail Market Report**. These reports are only available to SIA Premium, Standard and Retailer/Rep members. Reports will be issued on/around the second Thursday of each month and will link to a monthly recording that helps you navigate each top line retail report.

In addition, in an effort to help provide additional context to the retail data, SIA will produce the **"SIA Retail Wrap-Up"** that will feature highlights from the Snow Industry Retail Market Report, general market indicators, and (where applicable) relevant insights from our monthly **Retail Pulse** surveys. Through these surveys, SIA is engaging with retailers and consumers to get a "pulse" from people close to the action. Insights are enhanced by the number of contributors. Therefore, we welcome your continued support and participation!

Contacts

For SIA membership questions, monthly Retail Pulse Survey participation and/or additional SIA reports, please call Colin Edwards 435.659.3713 or email at cedwards@snowsports.org

For questions on NPD retail data or other NPD reports, please reach out to Julia Day 303.402.5611 or julia.day@npd.com

Terms of Use

Retail Data Highlights[1]

Sales - Dollars (000s)

All	YTD	Aug. 2018 - Sep. 2018	$648,913
		Aug. 2019 - Sep. 2019	$623,670
	Current Period	Aug. 2018 - Sep. 2018	$648,913
		Aug. 2019 - Sep. 2019	$623,670

Sales - Channel - Dollars (000s)

Chain	YTD	Aug. 2018 - Sep. 2018	$304,591
		Aug. 2019 - Sep. 2019	$275,015
	Current Period	Aug. 2018 - Sep. 2018	$304,591
		Aug. 2019 - Sep. 2019	$275,015
Internet	YTD	Aug. 2018 - Sep. 2018	$142,792
		Aug. 2019 - Sep. 2019	$132,426
	Current Period	Aug. 2018 - Sep. 2018	$142,792
		Aug. 2019 - Sep. 2019	$132,426
Specialty	YTD	Aug. 2018 - Sep. 2018	$201,530
		Aug. 2019 - Sep. 2019	$216,228
	Current Period	Aug. 2018 - Sep. 2018	$201,530
		Aug. 2019 - Sep. 2019	$216,228

Sales - Region (Specialty Only) - Dollars (000s)

Midwest	YTD	Aug. 2018 - Sep. 2018	$31,363
		Aug. 2019 - Sep. 2019	$42,978
	Current Period	Aug. 2018 - Sep. 2018	$31,363
		Aug. 2019 - Sep. 2019	$42,978
Northeast	YTD	Aug. 2018 - Sep. 2018	$61,723
		Aug. 2019 - Sep. 2019	$67,808
	Current Period	Aug. 2018 - Sep. 2018	$61,723
		Aug. 2019 - Sep. 2019	$67,808
South	YTD	Aug. 2018 - Sep. 2018	$14,987
		Aug. 2019 - Sep. 2019	$11,371
	Current Period	Aug. 2018 - Sep. 2018	$14,987
		Aug. 2019 - Sep. 2019	$11,371
West	YTD	Aug. 2018 - Sep. 2018	$93,457
		Aug. 2019 - Sep. 2019	$94,072
	Current Period	Aug. 2018 - Sep. 2018	$93,457
		Aug. 2019 - Sep. 2019	$94,072

Sales - Gender - Dollars (000s)

Mens	YTD	Aug. 2018 - Sep. 2018	$338,062
		Aug. 2019 - Sep. 2019	$327,319
Womens	YTD	Aug. 2018 - Sep. 2018	$241,578
		Aug. 2019 - Sep. 2019	$224,665
Youth	YTD	Aug. 2018 - Sep. 2018	$56,413
		Aug. 2019 - Sep. 2019	$57,530
	Current Period	Aug. 2018 - Sep. 2018	$56,413
		Aug. 2019 - Sep. 2019	$57,530
Not Specified	YTD	Aug. 2018 - Sep. 2018	$12,859
		Aug. 2019 - Sep. 2019	$14,156
	Current Period	Aug. 2018 - Sep. 2018	$12,859
		Aug. 2019 - Sep. 2019	$14,156

- Overall, the start of the season is a little soft with a decline in dollars (down approx. 4%). Units sold are roughly flat and there is a decline in average selling price.
- Accessories showing a decline in dollars (down approx. 1%). There is a larger decline in units sold and a small increase on average selling price.
- Apparel showing a decline in dollars (down approx. 3%). Units sold are flat, therefore there is a decline in average selling price.
- Equipment showing a decline in dollars (down approx. 6%). Both units sold and average selling price are down.

[1] Source: The NPD Group Inc., US Snow Industry Retail Market Report (Aug.-Sep., 2019)

Retail Pulse | What People Are Saying[2]

Retailers

North East

"Pre-season ski sales and interest are ahead of last season as well as the ski lease program."

"Hard to find qualified employees."

Midwest

"We brought the product in earlier than usual and seem to be capturing early season sales."

"Weather still needs to change to cold."

West

"Typically, this time of year we have customers solely looking for deals from last year. However, with the recent cold weather and snow in the mountains we are starting to sell current season product and do a fair amount of service."

"Many of our top vendors have undergone new system or warehouse changes causing significant delays, errors and billing in receiving our Fall/Winter orders."

South

"Hard Goods category is starting strong."

"Our biggest problem is online sales eroding our potential sales. Particularly outerwear, snowboards and skis."

Consumers

26% of respondents anticipate spending **more** on snow sports gear as compared to last season. Reasons include: *"gear is worn out", "getting back into skiing", "children growing fast."*

23% of respondents anticipate spending **less** on snow sports gear as compared to last season. Reasons include: *"no need for new/more gear", "will rent instead of buying new this season", "prices keep going up on gas, hotels, food, etc."*

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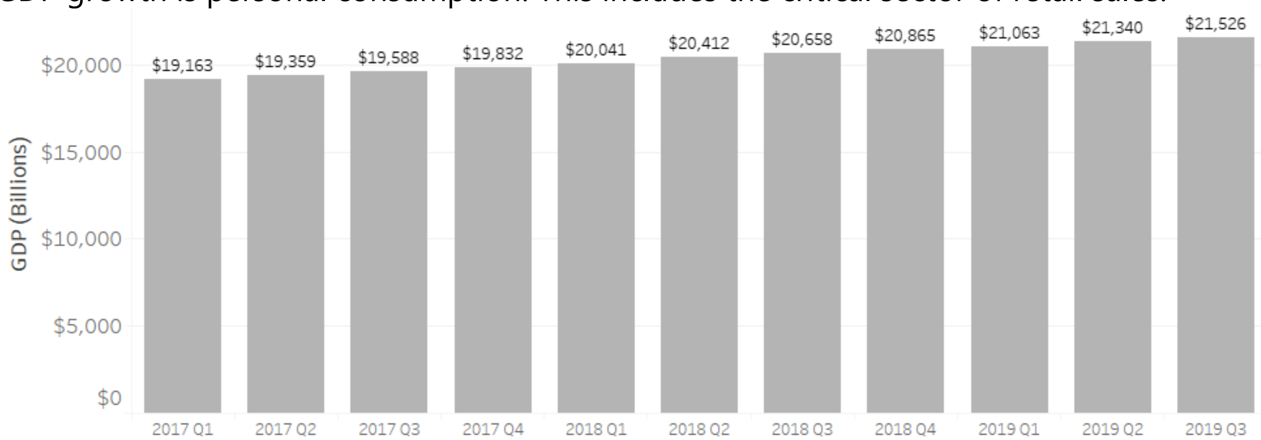
[2] Each month SIA surveys panels of consumers and retailers. These insights reflect the answers from the respondents.

Market Data

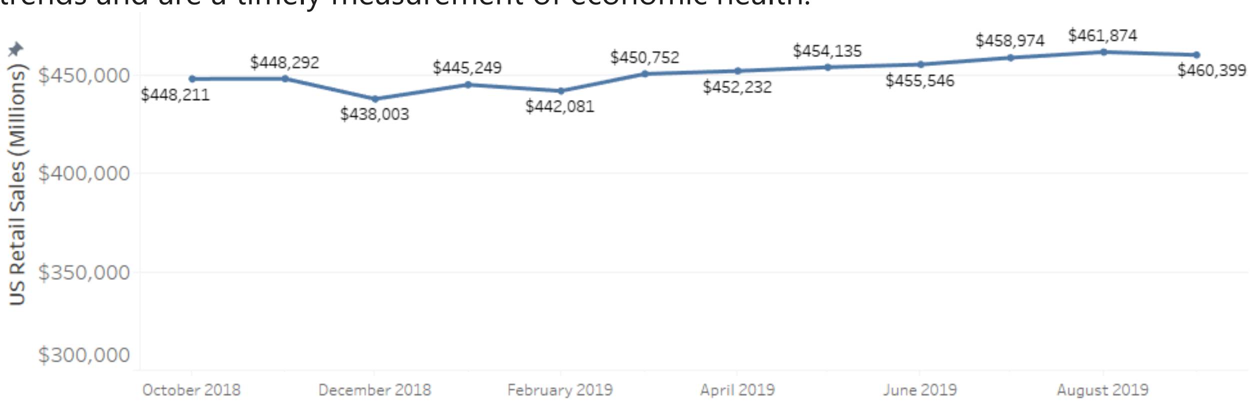
Gross Domestic Product[3]

The GDP growth rate measures how fast the economy is growing and is the most important indicator of economic health. The GDP growth rate is driven by four components: personal consumption, business investment, government spending, and net exports. The main driver of GDP growth is personal consumption. This includes the critical sector of retail sales.[4]



US Retail Sales[5]

The U.S. Retail Sales Report, published monthly by the U.S. Census Bureau, is a monthly measurement of the U.S. retail industry. Retail sales are used to predict consumer spending trends and are a timely measurement of economic health.[6]



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3 https://www.bea.gov/data/gdp/gross-domestic-product#gdp, accessed November 2019
4 https://www.thebalance.com, accessed November 2019
5 https://www.census.gov/retail/index.html, accessed November 2019
6 https://www.thebalance.com, accessed November 2019