



2014 SIA Downhill Consumer Intelligence Project

Phase 1 - The Discovery Phase



The Downhill Consumer Intelligence Project

Summary of the Discovery Phase – Phase 1 of the Project

Executive Summary

A thorough examination of the past three decades of snow sports data uncovered a remarkably static snow sports market. This historic data showed no steep declines in either sales or the participant base that could not be explained primarily by weather. The data also illustrated the expected growth curve of the snowboard category with modest declines over the past four seasons that may be explained by normal maturation of the sport. However, along with the absence of any steep declines in sales or in the participant base we found no significant growth with one exception that occurred in the market when shaped skis were introduced. No program or marketing campaign designed to grow the participant base moved the needle enough to show up in the data. Additionally, we found past snow sports research efforts, and the findings and recommendations stemming from those efforts to be remarkably, but appropriately similar over the past 35 years. Based on this review of long term trends in the snow sports market, it's clear that future efforts to grow snow sports must break old paradigms in order to have significant impacts. The next phases of the **Downhill Consumer Intelligence Project** [DCIP] will examine the attitudes, preferences and behaviors of current and aspirational snow sports consumers, explore why past efforts apparently failed, and explore different methods to grow the participant base and sales based on the consumer trends we uncover.

The barriers to participating in snow sports haven't changed much over the years, and changes in the industry's approach to breaking those barriers may lead to growth. Past and recent qualitative study indicate that major barriers to growth include lack of access to snow sports due to expense, proximity to resorts, lack of knowledge about how to get started, nobody to ski or snowboard with, and opportunity costs (so many things to do, so little time). While most of these barriers have been addressed one way or another by traditional programs that do bring some new participants into the market and have brought some lapsed participants back, they have not brought them in droves. The traditional approaches have not had impacts sufficient to show growth in the aggregate participant or sales data. And compared to other leisure activities including golf, cycling, backpacking and even soccer, lack of significant decline is a very positive sign. Many other activities are looking at non-traditional approaches like foot golf, pickleball, and obstacle course racing, that are helping tennis, golf, and running grow their participant bases. Opportunities to grow snow sports may include a variety of non-traditional activities that address the principal barriers of expense, proximity, need for a snow sports companion, and intimidation in the face of a steep learning curve for beginners. The remaining phases of this research project will include some testing of non-traditional snow sports activities like local or mobile terrain parks and learning centers, efforts to take the growth campaign viral, and solicitation of ideas to grow snow sports across the industry and the consumer base.

Modern technology including smart phones that provide 24/7 access to the Internet and social media have changed the way snow sports products and activities are consumed. The Internet has played a significant role in changing business models on both the retail and wholesale sides of the snow sports market, and social media has completely disrupted models for executing marketing and advertising campaigns to reach existing, potential and lapsed consumers. Although these changes have proven



disruptive to the snow sports market, they also provide advantages that can be leveraged to attract more participants and grow sales. Viral campaigns have the potential to reach millions of viewers and could be highly leveraged to grow snow sports. Social media coupled with a variety of snow sports “apps” and action cameras allows snow participants to share their experiences across vast networks of friends and fans. Smart phones changed the way consumers shop and purchase both snow sports gear and snow sports experiences. In short, technology has changed the way we do everything and ongoing research on the impact of technology in snow sports must be an ongoing, deliberate exercise to ensure that disruption is associated more closely with opportunity than with loss.

Additionally, the research uncovered some looming threats to the snow sports market including climate change, urbanization of the snow sports participant, cultural and attitudinal changes including childhood obesity, obsessive use of screens/media, lack of desire for ownership among Gen Y and Gen Z members (houses, autos, sporting goods equipment), lack of wage growth in the middle and upper middle class, and income disparities that leave a higher percentage of the population with very limited disposable income. It will be important in the coming phases of the research effort, and on an ongoing basis to explore these larger cultural trends. Climate change is a larger issue and snow sports may be in a position to drive discussion but efforts arrest changes in climate are unlikely to have a broad impact. In the near future, snow sports will likely need to adapt to empirical changes in temperature and snowfall. Today’s snow sports consumer sees climate change as a threat to snow sports and many have indicated that they are sensitive to the climate issue and want to positively impact the environment. Further research in the later phases of the **Downhill Consumer Intelligence Project** will focus on attitudes surrounding climate, and other cultural and attitudinal issues and perceptions that could impact the snow sports market.

Finally, demographic shifts in the U.S. population offer opportunities to bring more participants into snow sports. The snow sports participant base has more ethnic and gender diversity than many perceive, but it still doesn’t match the diversity found in the population, even in the high income, high education demographic snow sports participants typically fall into. Income and education levels are more predictive of snow sports participation than ethnicity. However, the perception that snow sports lacks diversity is a barrier for some potential participants and more could be done to attract a more diverse participant base to snow sports. This becomes more important every day as the U.S. population becomes more diverse. Working to draw a more diverse audience with a focus on the most predictive factors of snow sports participant demographics including age, household income, and education levels will pay dividends in the market for many years to come. Research in the later stages of the DCIP will include an exploration of methods that have successfully built diversity in the snow sports market in specific locations such as Southern California and how those efforts could be expanded to grow the participant base and increase sales in other regions.



Overall, the Discovery phase of the research demonstrated the following key points:

- The snow sports market is stable, not declining significantly but not growing. No program designed to grow the participant base has significantly “moved the needle” up on the number of skiers and snowboarders in over 30 years but they may have mitigated declines.
- Although past recommendations to grow the snow sports market follow logically from available datasets, and the resulting programs have not been completely ineffective, the participant base will not grow significantly without exploring new paradigms that truly break down barriers for new and lapsed participants.
- The snow sports consumer base is young, educated and wealthy but [lack of] diversity is becoming an issue, as are negative perceptions surrounding the dearth of diversity in snow sports. The population of the U.S. is becoming more diverse and snow sports has an opportunity to grow by building more diversity into the base.
- Technology plays a significant role in all aspects the snow sports market including the supply side, retail and among consumers. Technological change and trends in the use of technology on all sides of the market should be monitored and reported regularly and deliberately.
- The highest concentrations of potential snow sports participants reside in major metropolitan areas on the East and West Coasts. Targeting those markets with the highest concentrations of consumers who fit the snow sports demographic is a strategy likely to have the greatest impact on the participant base.
- Climate change is not something the snow sports industry can have an immediate impact upon, but we may have opportunities to exert influence. Our participants have a high level of awareness about the issue and the industry may have a voice in the political discourse due to our standing as a “canary in the coal mine” on the issue. The industry’s ability to give voice to empirical climate issues may open doors that allow the industry more political influence overall despite a lack of efficacy to reverse the actual effects of climate change. In fact, the industry may need to find ways to adapt to variable snow conditions that are caused by climate change in the near and distant future.
- Change is rapid in the snow sports consumer base. Consumer preferences, trends, and demographics must be monitored constantly, deliberately and in a timely fashion to maintain a robust understanding of the snow sports consumer.



1994 Compared with 2014

	Snowboard 1994	Snowboard 2014	Downhill Ski 1994	Downhill Ski 2014
Number of Participants (participated 2 times+)	2,061,000	5,991,000	10,620,000	8,337,000
Gender Mix M/F	82 to 18	67 to 33	59 to 41	61 to 39
Frequency of Participation				
Core = 9+ days	695,000	2,132,000	4,248,000	2,396,000
Casual 2 to 9 days	1,366,000	3,859,000	6,372,000	5,942,000
Age Distribution				
Under 18	52.0%	30.0%	25.0%	25.0%
18 to 34 Years	39.0%	51.0%	49.0%	36.0%
35 to 54 Years	4.0%	18.0%	24.0%	33.0%
55+	3.0%	1.0%	3.0%	6.0%
Regional Mix				
New England (CT, ME, MA, NH, RI, VT)	7.5%	8.2%	9.4%	8.1%
Mid Atlantic Region (NJ, PA, NY)	15.0%	14.8%	13.6%	17.4%
South Atlantic Region (DE, FL, GA, MD, NC, SC, VA, WV, DC)	7.2%	9.5%	12.6%	20.3%
Pacific Region (CA, OR, WA, AK, HI)	29.0%	26.8%	22.6%	10.1%
Mountain Region (AZ, CO, ID, MT, NV, NM, UT, WY)	11.2%	12.0%	13.0%	10.5%
South Central Region (AL, AR, KY, LA, MS, OK, TN, TX)	3.7%	5.5%	9.7%	16.6%
North Central Region (IA, IL, IN, KS, MI, MN, MO, OH, NE, ND, SD, WI)	26.2%	23.2%	18.9%	17.2%
% that live in Cities with 2.5M or more persons	31.7%	45.0%	27.0%	48.0%
Ethnic Diversity				
White	NA	67.1%	NA	67.3%
Asian/Pacific Islander	NA	10.4%	NA	11.6%
Hispanic	8.0%	9.1%	7.8%	7.8%
Black	0.0%	10.2%	0.2%	9.6%
Notable Cultural Themes	1994		2014	
Notable Stories	4 Convicted in World Trade Center Bombing, OJ Simpson Arrested, Northridge Earthquake, Clinton Accused of Sexual Harassment, Motorola microTAC mobile phone introduced with 75min battery life and \$3K price tag. Shopping is done "at the mall" and kids want grunge plaid. The "Chunnel" between UK and France opens.		Social Media, Terrorism, Political Gridlock, Slow Economic Recovery (since 2008), Climate Change, Crowd Sourcing, Immigration, Racial unrest in U.S. from Ferguson, MO. Research and shopping done on smart phones. Google glass introduced. 3D printing beginning and more on the horizon.	
Skiers' and Snowboarders' Concerns	Expense, Lack of time, Nobody to go with, risk of injury, don't know how to get started		Expense, Lack of time, Nobody to go with, climate change, risk of injury, don't know how to get started	
Business	Fed raises interest rates 6 times to curb inflationary pressure. Economy hurt by Northridge earthquake. Aerospace and defense industries cut spending/cost. Housing and commercial construction on the weak side.		Cyber security at the forefront of retail business concerns. Chinese middle class balloons, low cost production to Vietnam and Bangladesh. Smart phones uses to research and purchase products. Apple introduces Apple Pay mobile wallet technology	
Number of Ski/Ride Areas	516		478	
Number of Skier/Rider Visits	56,640,000		56,700,000	
AVG Number of Beginner Lessons	7,684		6,189	
AVG Number of Lessons all Levels	26,237		20,629	
AVG Days Open (Areas)	118		125	
AVG % of snowboarder Visits	10.8%		29.5%	



Next Steps

Over the course of the 2014/2015 snow sports season, the SIA Research team will conduct primary research efforts to ensure the industry has a clear view of the snow sports consumer, current and potential future trends, and potential of programs to promote growth in the participant base. This information will come from a mixed method approach that includes surveying consumer panels, surveying snow sports retailers and suppliers, and conducting interviews on-mountain with more than 10,000 participants. Additionally, SIA Research will collaborate with other research organizations, other trade associations, and individuals who possess unique knowledge about markets and consumers to leverage other efforts to grow markets and participant bases in activities such as golf, running, tennis, skateboarding, etc. Additionally, snow sports will begin tracking conversations and posts related to snow sports on social media, various blogs, and other sources such as Google to determine via analysis of “big data” what subject areas related to snow sports are trending with participants. The results of those analyses will be communicated to SIA members and other using a dedicated landing page for the Downhill Consumer Intelligence Project at <http://www.snowsports.org/DCIP/>, in various live presentations, webinars, and traditional reporting methods. The official DCIP project is scheduled for completion in August 2015 with final reporting in September 2015. At the completion of this project, the SIA Board of Directors and industry organizations collaborating in the effort should have, as an outcome of this report, detailed segmentation of the snow sports consumer and a clear “road map” to guide efforts to grow the snow sports participant base and marketplace.

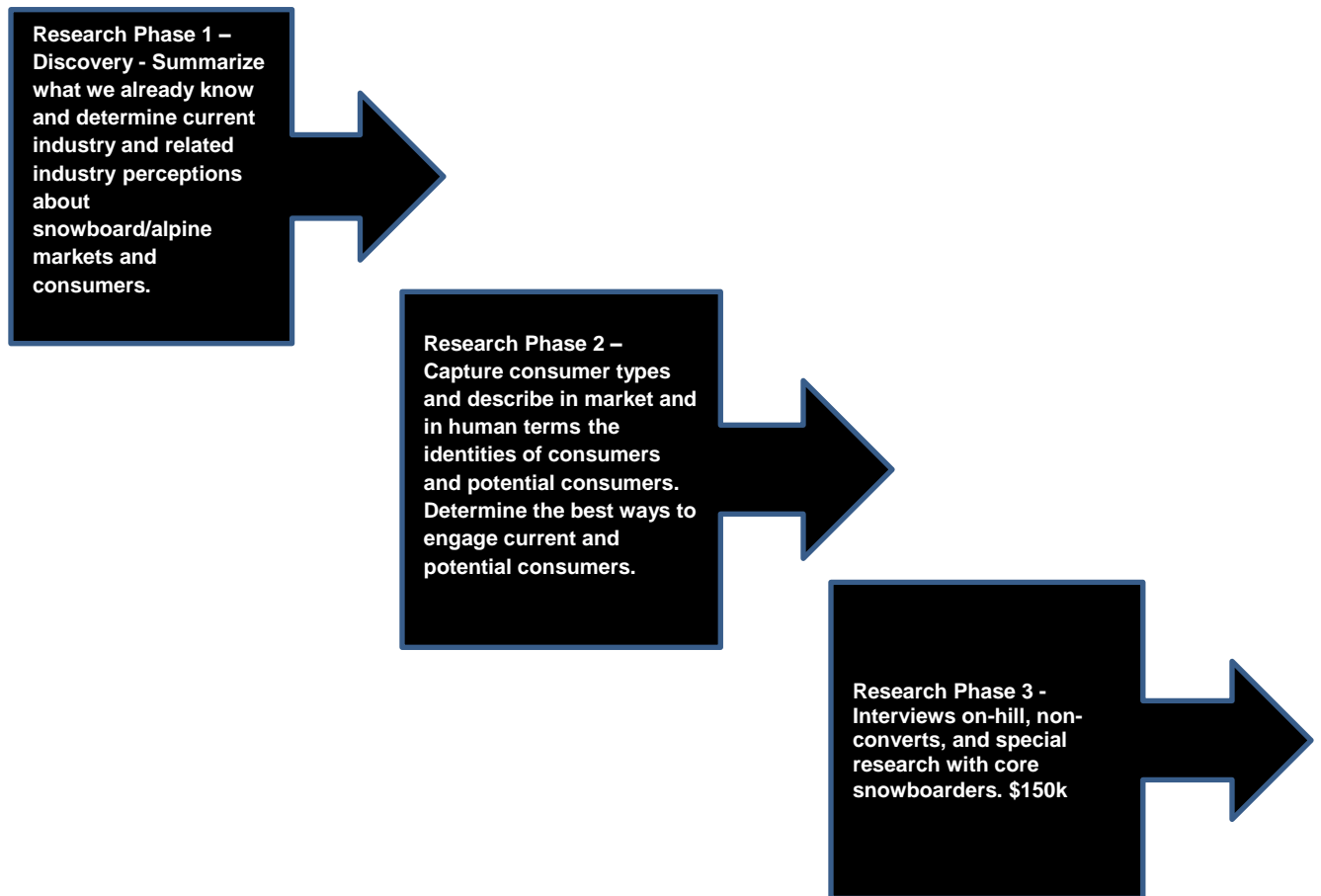
Next Steps:

- Survey Panels (TransWorld Business, Label Networks, SSI, SnoCru and RRC)
- Survey Retailers, Reps and Suppliers
- 10K on Mountain Interviews (RRC)
- Research Forum (Golf, Tennis, Skate, Bicycle, Team Sports, Climate Change, Australia)
- Analysis and Conclusions
- Get feedback from all industry group (retailers, reps, suppliers, and resorts in April 2015 (prior to the NSAA Spring conference and 2015 Spring SIA BOD meeting)
- Get Feedback from Collaborators
- Additional Research Ad Hoc following Feedback from Reps, Retailers, Resorts and Collaborators
- Campaign/Communication of results
- Implementation and Campaign/Communication on new programs with embedded metrics



Full Description of the Downhill Consumer Intelligence Project – Phases 1 to 3

The first phase of the Downhill Consumer Intelligence Project was designed and executed to examine where the snow sports market has been, where it is now, and what we need to do in the next phases of this research project to determine how to grow the participant base and sales. This was the beginning of a three phase project scheduled for completion in August 2015.



SIA is collaborating with more than 20 organizations to conduct this research including the National Ski Areas Association, RRC, Pennsylvania Ski Areas Association, ISkiNY, SkiNH, NWSAA, PSIA, USSA, National Tennis Association, National Golf Foundation, Ski Industries Australia, TransWorld Business, Label Networks, Protect Our Winters, the National Climate Data Center, and many others. Collaboration includes sharing data, comparing qualitative research results and ideas, sharing information about programs to increase growth, and sharing a variety of research resources. Collaboration is a key feature of this project and will continue and intensify in the next two phases where primary research is required. Collaboration is a key component of this research effort; it's absolutely critical in our efforts to accurately analyze the entire downhill market and to effectively communicate the results of this project.



The Discovery Phase Overview

When looking back approximately 15 years at both sales and participants, the issue that sticks out isn't decline in either the number of participants or in retail sales, but the overall static nature of both – no growth, not huge gut wrenching decline – the data indicate that the snow sports market, overall, has a static nature. The following datasets are the essential datasets on snow sports participation and sales. They demonstrate the lack of significant movement in the market not explained by weather or the maturation of the snowboard category. They also illustrate snow sports demographics and participation trends at resorts. These datasets clearly demonstrate the static nature of the snow sports market.

Issues that emerged from the Discover Phase Research:

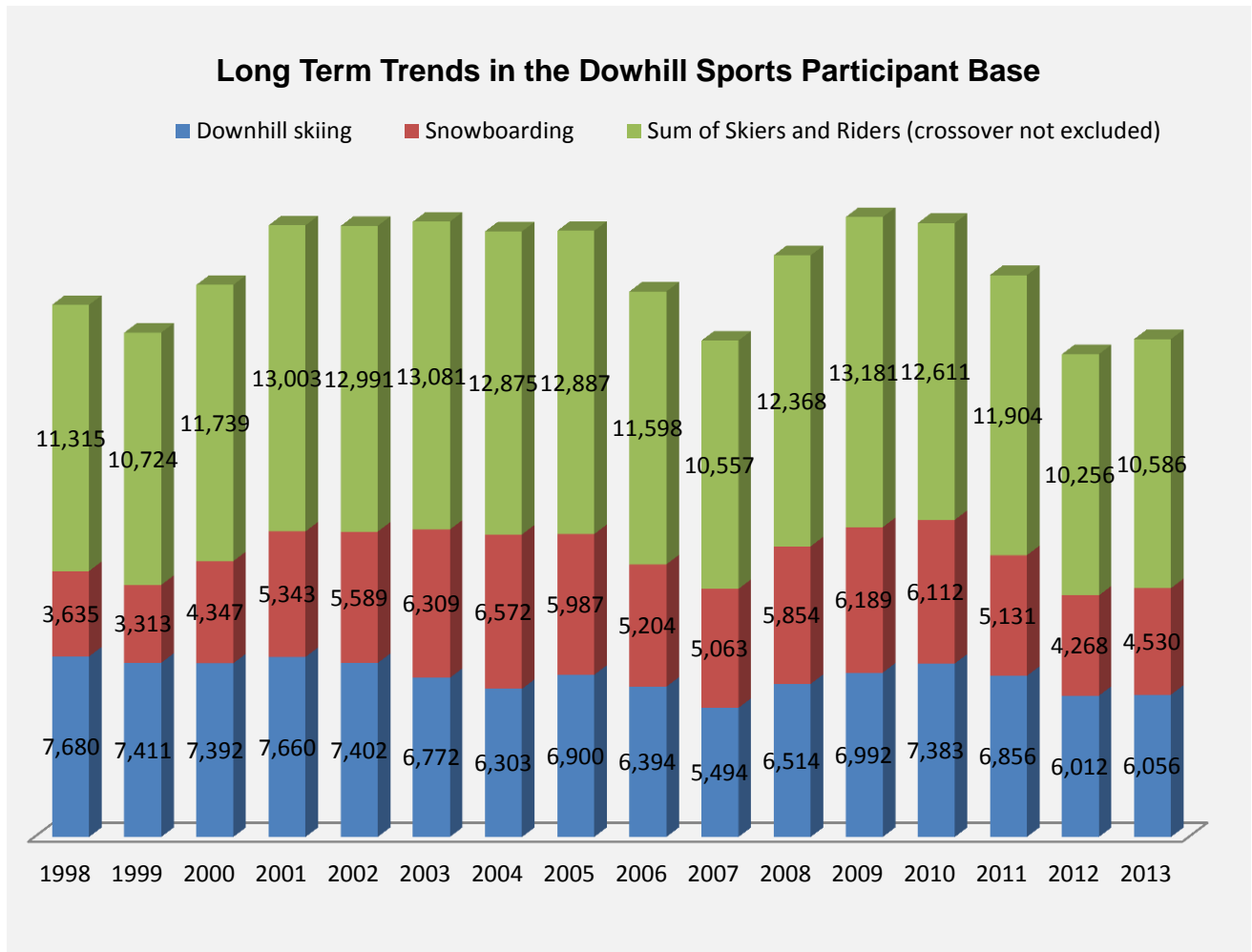
- **Access to snow sports** – barriers to access include the following major issues identified by snow sports participants, lapsed participants and persons who express an interest in participating but have not yet participated – price, proximity to a resort, nobody to go with, don't know how to get started (education).
- **See changes in marketing and advertising vehicles** for snow sports due to the development of the Internet and the rise of social media
- See changes in **how consumers research and purchase** snow sports gear (direct sales, Omni-channel sales)
- **Climate change** and perceptions among consumers about climate and snow sports participants
- Changing **Demography** of the U.S. population
- **Rapid cultural and attitudinal shifts** in youth dominated markets

Opportunities to break down these barriers and address/understand changing consumer behavior include:

- Bring the market to the consumer - Learning campaigns that include non-resort based skiing and riding including backyard terrain parks, golf courses, sledding hills, and off-snow, or manufactured snow in non-traditional locations to introduce participants to snow sports.
- Mid-week and beginner discount packages to engage and re-engage participants who name price as the primary barrier. Working with resorts to build capacity when capacity is low.
- Education campaigns – how to get started skiing and riding targeting
- Campaigns to connect snowboarders and skiers with other snowboarders and skiers via social media, support for traditional clubs, and other means
- Working with consumers on a regular and deliberate basis to understand what they perceive about the snow sports experience and marketing campaigns. Will take the form of general consumer opinion research, specific brand strength indexing study, and correlation with other research.
- Understanding the various paths to participation and sales – stories from consumers about how and why they got involved in the sport and when they purchased equipment and other gear.
- Examine the potential of becoming a voice of awareness on climate – good or bad – one that allows participants to connect their snow sports experience as a participant with their knowledge and association with the climate.
- Communicate the health benefits of outdoor activity in winter



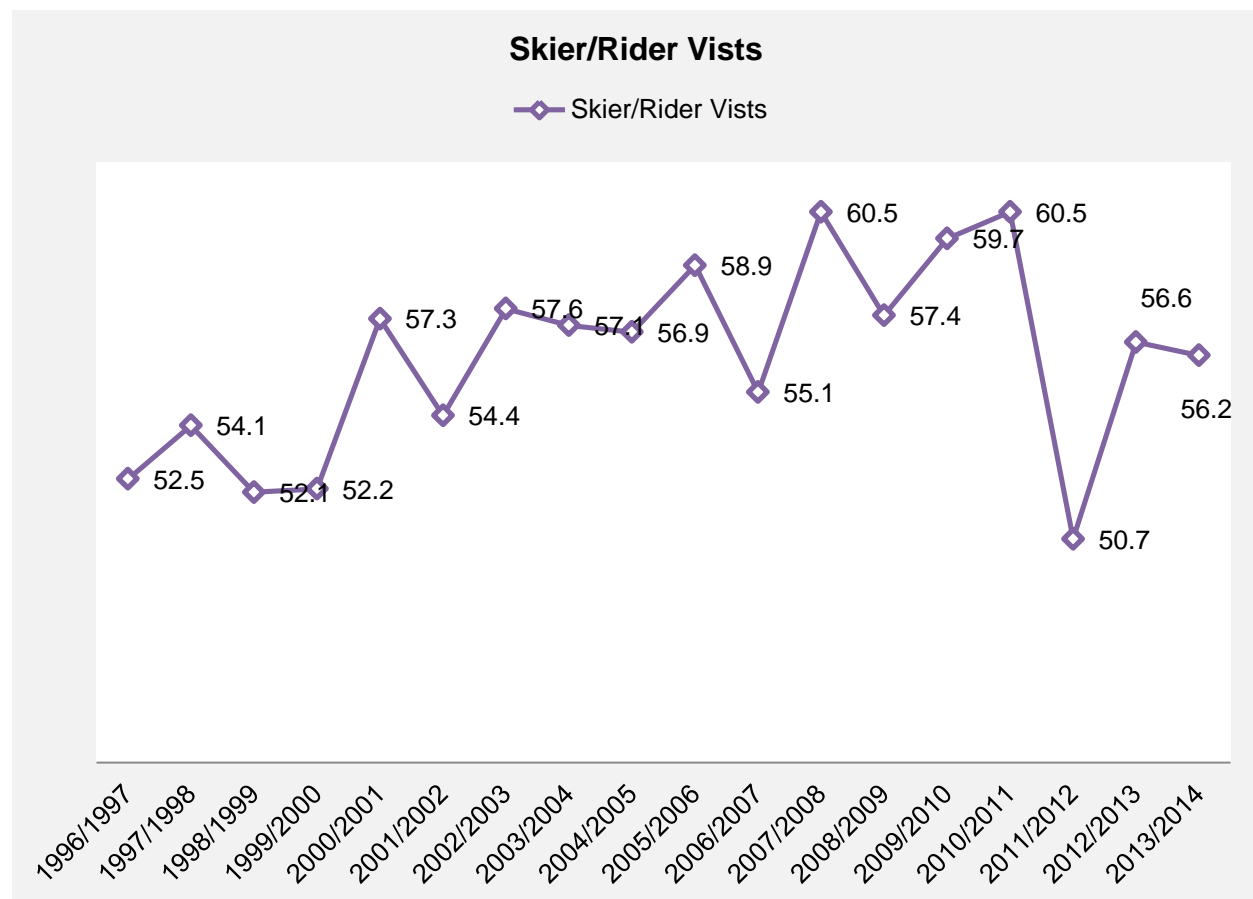
Participant Base Data



Source: NSGA Sports Participation Reports 1998 – 2013 - Snow Sports Participation



Over the past sixteen seasons, 12M was the average number of participants who said they ski or snowboard at least 2 times in a given season. The average does fluctuate with weather and changes in survey methods, but overall could be considered relatively flat over time. The number of participants peaked in 2009 at 13.2M and declines since that year may be explained by a combination of weather, economic hardship (particularly among 18 to 34 year olds) and changes in NSGA survey methodology that may have improved accuracy, but resulted in a visual downturn.

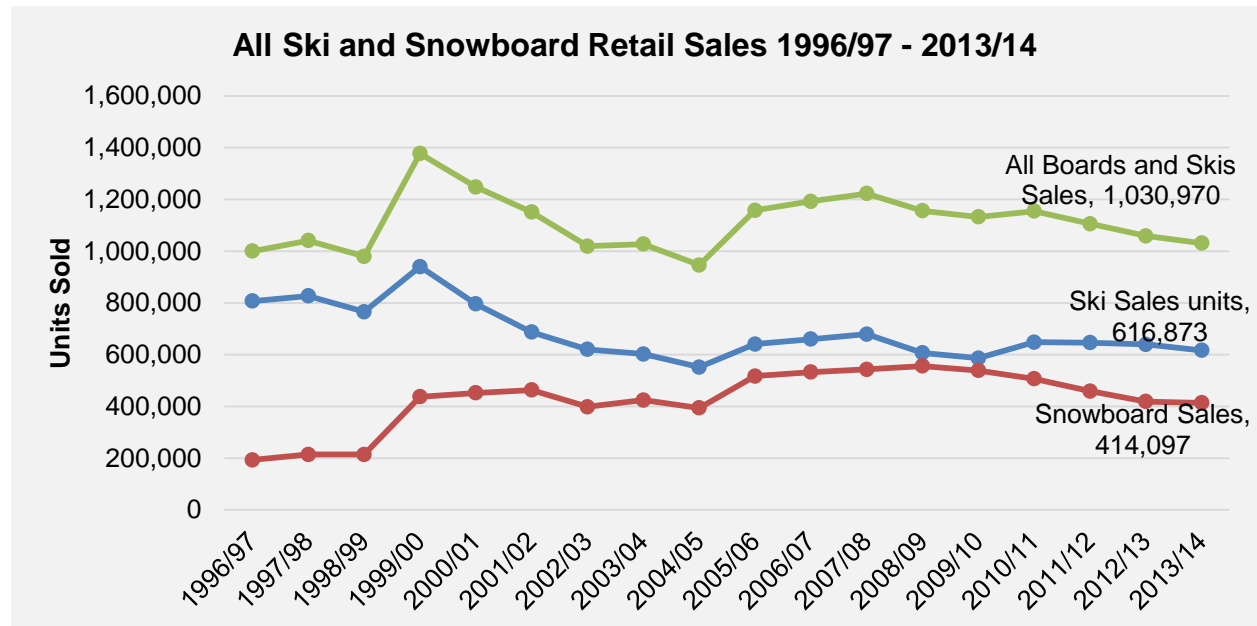


Source: NSAA Kottke End of Season Report 1997/98 – 2013/14

Weather is the primary driver of skier/rider resort visits as the average hovers around 52M over the past 18 seasons. Peaks in 2007/2008 and 2010/2011 were entirely weather driven as were the serious drops, like the drop seen in 2011/2012. Overall, the number of visits to resorts has remained fairly static over time and correlates well with the long-term trends in the number of participants.



Ski and Snowboard Retail Sales Trends



Source: SIA RetailTRAK™ data produced by Leisure Trends, a NPD Group Company

Retail sales are impacted most by weather, and sometimes by introduction of new technology in the market. Retail sales of skis and boards were booming in the late nineties as snowboard sales soared and “shaped” skis were a new must-have item for skiers. Sales of snowboards peaked in 2008/2009 when many snowboarders were sold on the benefits of rocker boards. Note that the participant base numbers did not spike with sales.

Rarely, economic issues have an impact on snow sports such as the gasoline scarcity issue in the 1970's. Arguably, the economic downturn that began in 2008 is an issue with the young adults in Generation Y who have struggled to enter the workforce and stay gainfully employed during some of the leanest economic times seen in over 50 years. Lagging sales of skis and snowboards over the past four seasons can be attributed to weather and possibly to economic hardships suffered by young people at the heart of the snow sports demographic. Economic indicators show an improving economy with better employment opportunities, but lack of wage growth may continue to take a toll on activities that require more disposable income.

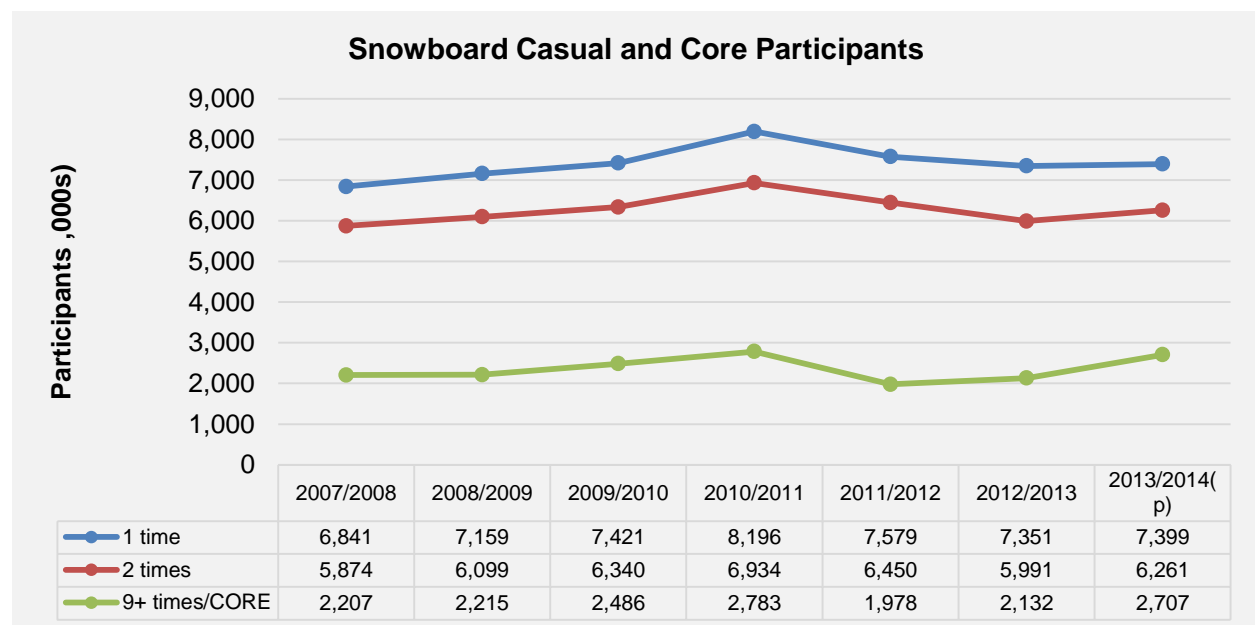
Sales of skis and snowboards at retail last peaked in 2010/2011 at 1.2M units sold and have averaged 1.1M units over the past 10 years. Retail sales finished last season 8% below the 10 year average but some of the decline also may be explained by the rise of direct sales – sales direct from the supplier to the consumer via the Internet, or from branded stores (not yet measured). Data on the number of brands selling direct to consumer indicate that this trend is likely to grow over the next 5 to 10 years.



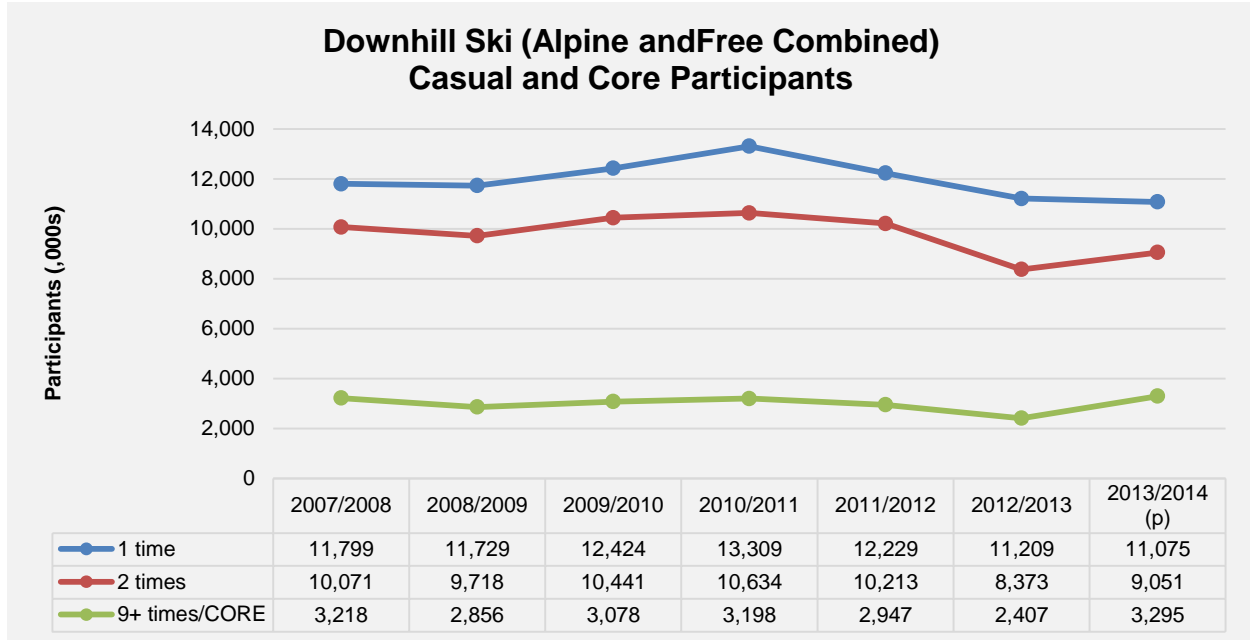
The Downhill Snow Sports Core Participant

The group of downhill skiers and snowboarders who participate most frequently are known as “core” participants. Over the past 7 seasons, 37% of snowboarders are core and 30% of downhill skiers are considered core. These are the participants who are most likely to own rather than rent their snow sports equipment, buy season’s passes, go on destination snow sports vacations and communicate about snow sports most often on social media.

Of the 7.4M persons who reported in the Physical Activity Council study that they snowboard, 2.7M participated 9 or more times. The number of core snowboarders has been on the rise for the past two seasons although many are riding terrain that is not lift-served including homemade terrain parks, rails and other features in school yards and in the urban environment, and in the backcountry.



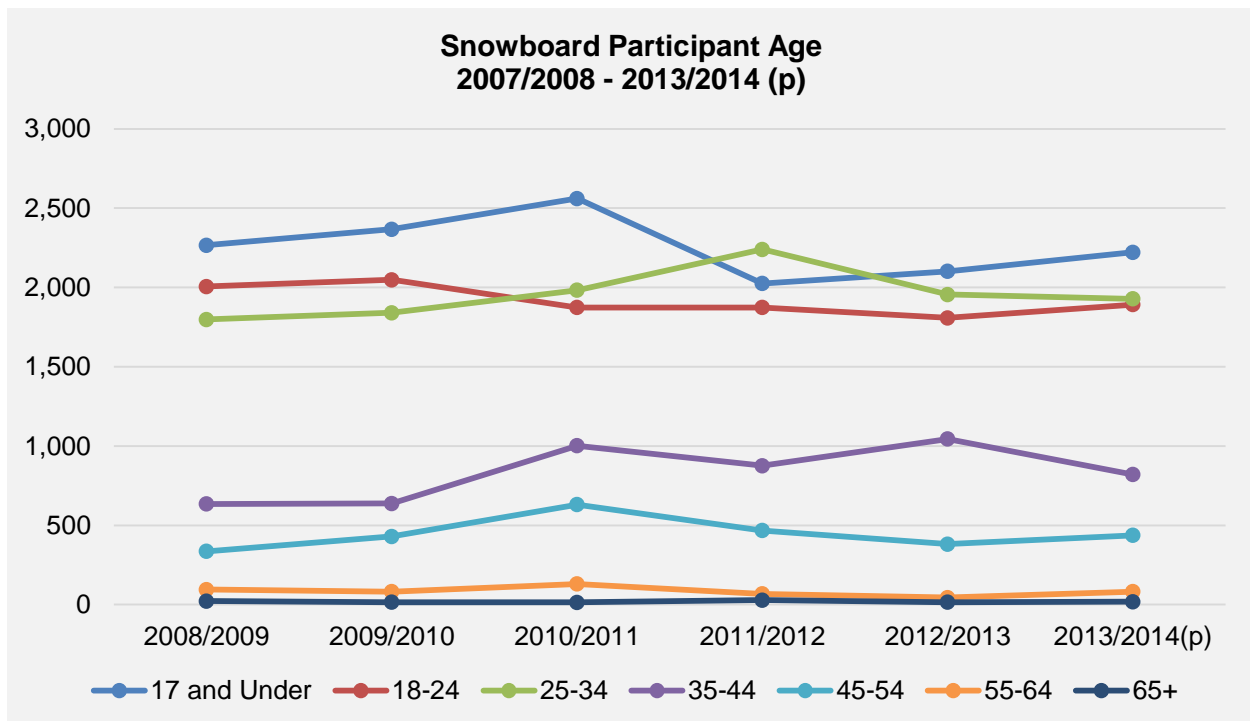
Source: SIA Participant Study, data produced by the Physical Activity Council



Source: SIA Participant Study, data produced by the Physical Activity Council

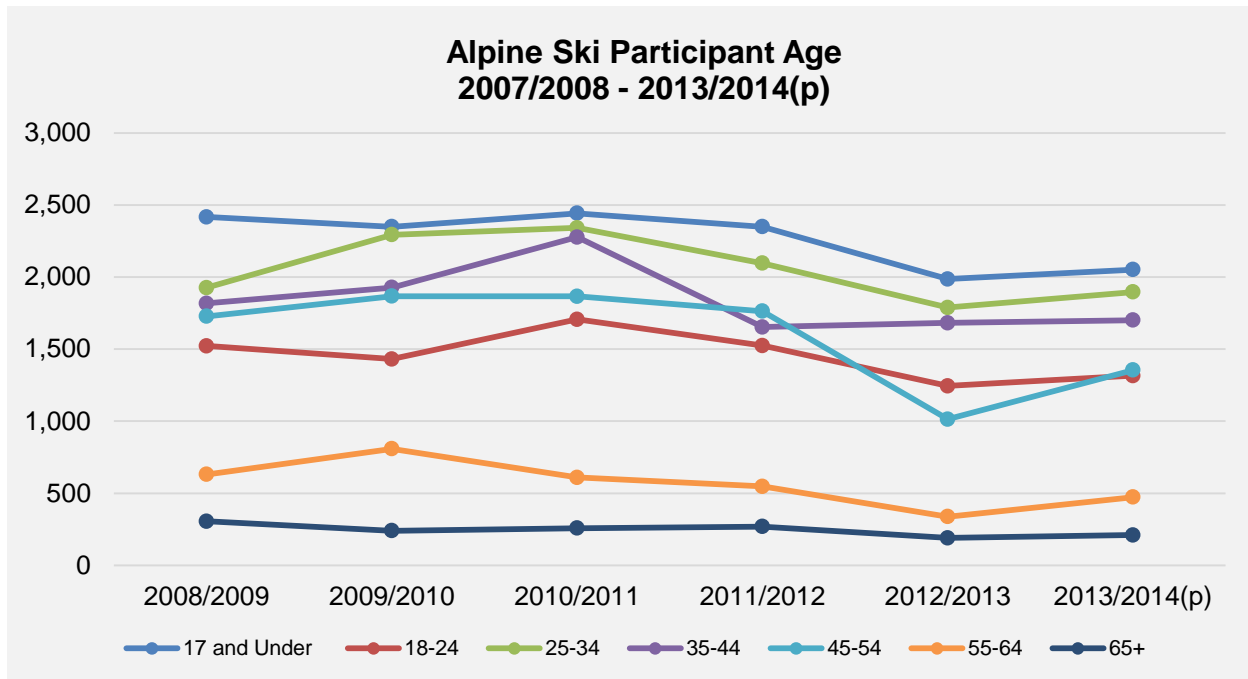
Age Demographic of Downhill Snow Sports Participants

A younger demographic drives constant change in the snow sports market. Downhill snow sports participants are a young demographic. In fact, 81% of snowboarders, 73% of freeskiers, and 60% of alpine skiers are under 35.

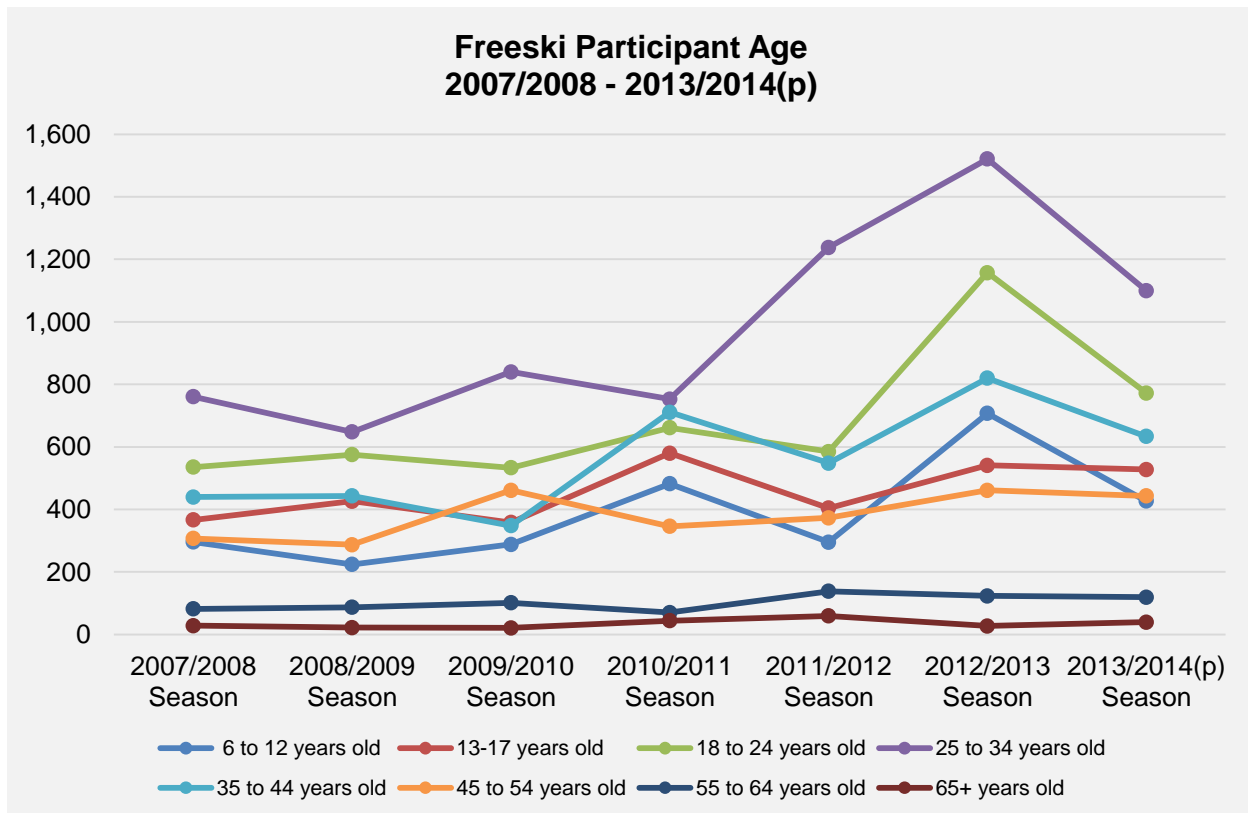


Source: SIA Participant Study, data produced by the Physical Activity Council





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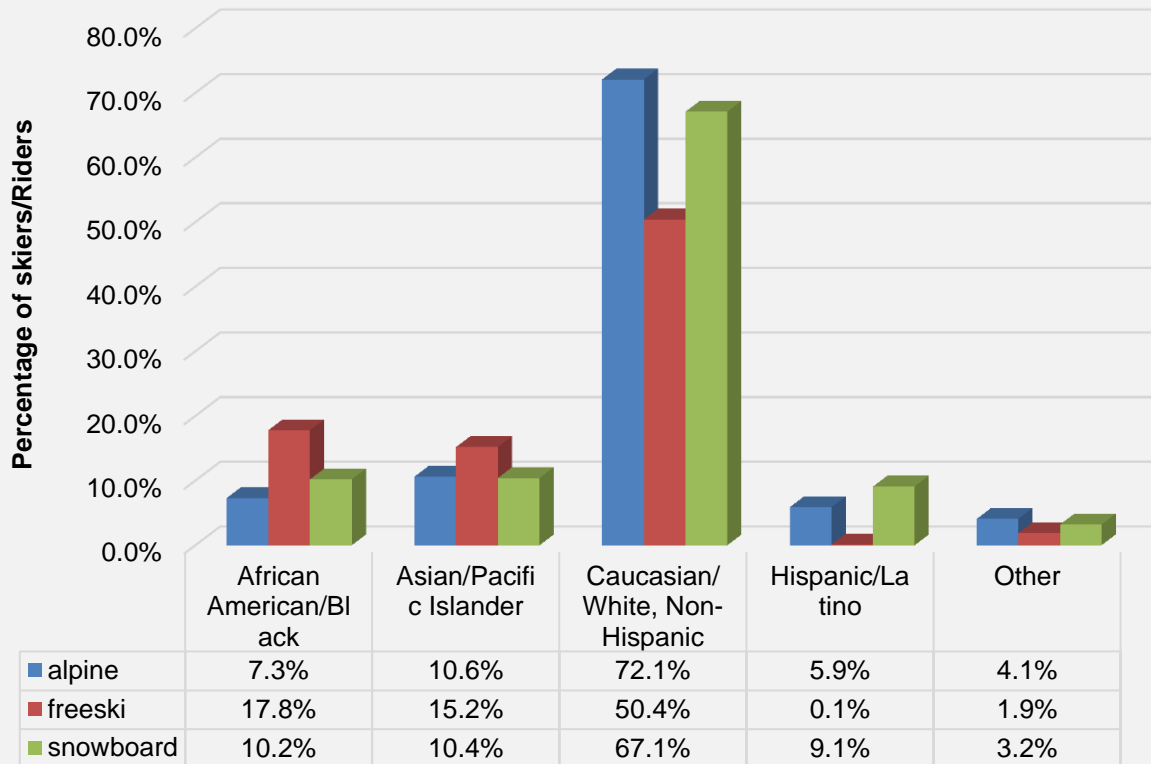


Source: SIA Participant Study, data produced by the Physical Activity Council

Snow Sports and Changing U.S. Demographics

Changing Demographics in the U.S. pose a challenge to snow sports, and present an opportunity. Population projections from the U.S. Census Bureau indicate that the diversity of the general population is growing as the population numbers of minority groups, particularly Hispanics is growing (Note that the U.S. Census Bureau does not consider the designation “Hispanic” to be an ethnicity. Hispanic origin is considered an ethnicity, not a race. Hispanics may be of any race). Currently, ethnic diversity in snow sports is mixed with Freeskiing being the most diverse (but not with Hispanics), alpine the least, and snowboard in the middle (and is the discipline that attracts the highest percentage Hispanic participants). Efforts to bring in a more diverse participant base including work by groups like SOS Outreach, and marketing campaigns for resorts and ski and ride areas that draw customers more ethnically diverse communities like Southern California are working. However, population projections from the Census Bureau and analysis of the population data by groups like Pew Research indicate that more work to bring more ethnic diversity, with a focus on Hispanic participants to the snow sports market is a key component to keeping the market healthy far into the future.

Ethnic Diversity in Downhill Snow Sports Disciplines

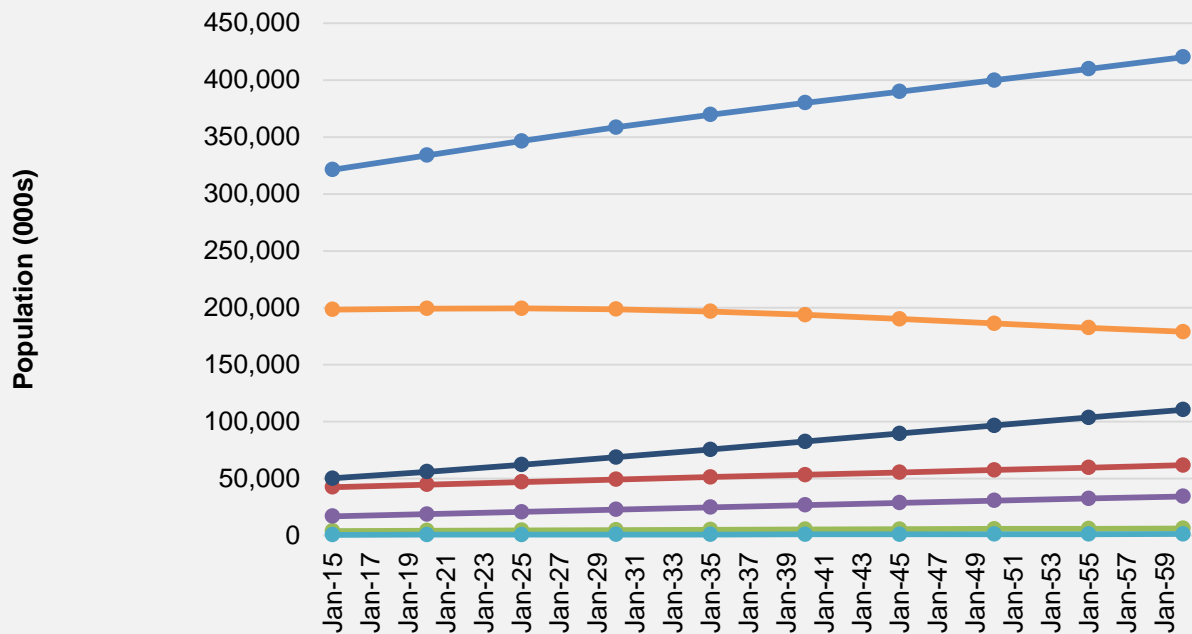


The distinguishing characteristics of snow sports participants have remained fairly static over the years and include higher than average education and income levels, higher than average physical activity participation, and a higher percentage of *Non- Hispanic White participants than is found in the general population. These demographic patterns in snow sports date back many decades. In a 1976 Report for SIA conducted by A.C. Nielsen, slightly more than 70% of participants in snow sports came from households that with higher than average median household income. Today, about 72% of downhill participants come from household with higher than average median income.



Currently, 62% of the U.S. population is characterized as Non-Hispanic White, 16% as Hispanic White, 13% black, 5% Asian, and the remaining 1% are classified as American Indian/Alaska Native (AIAN), Native Hawaiian/Pacific Islander (NHPI), or other. By 2030, 54% of the population will be Non-Hispanic White, 19% Hispanic White, 14% black, and 6% Asian. This data indicates that efforts to bring in more minorities, particularly more Hispanic participants will help maintain the current size of the snow sports participant base even as the size of the white populations shrinks in number and in percentage of the overall population.

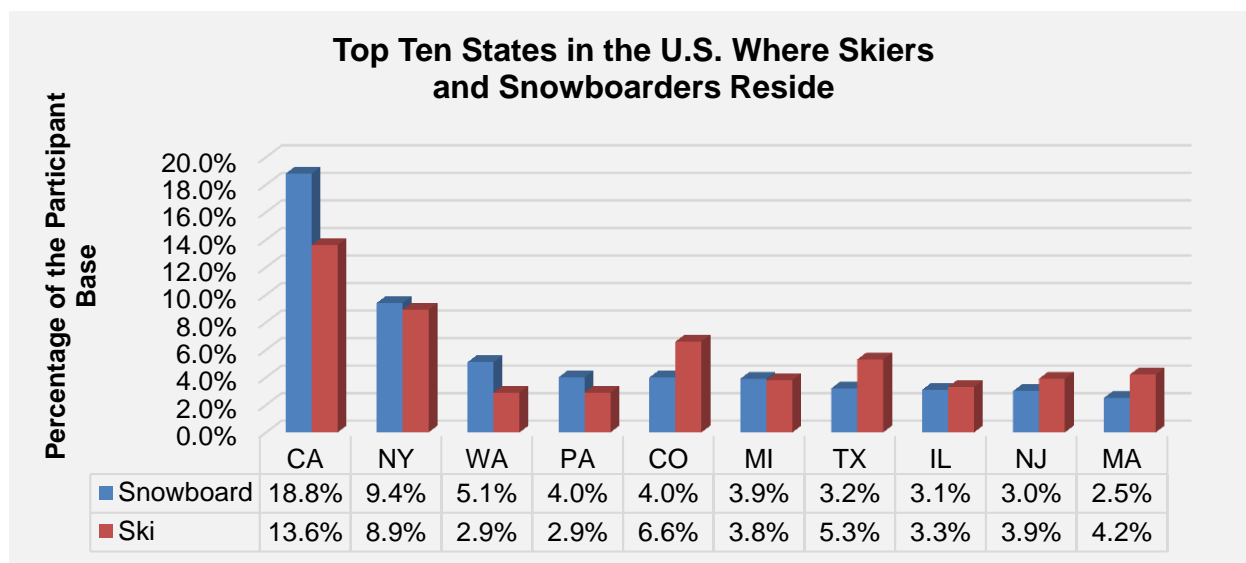
Population Growth Projection (US CENSUS) Calendar Year 2015 to Calendar Year 2060



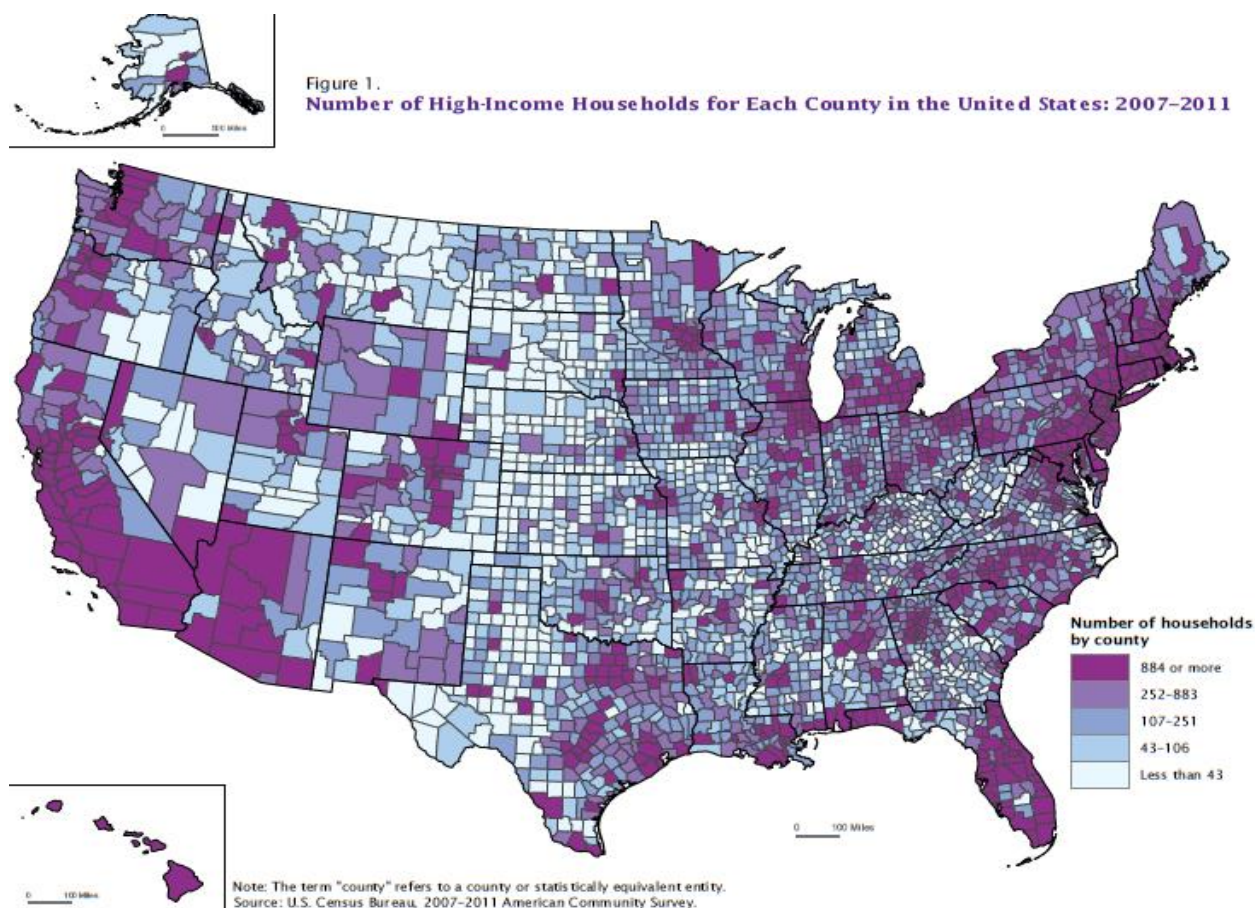
	Jul-15	Jul-20	Jul-25	Jul-30	Jul-35	Jul-40	Jul-45	Jul-50	Jul-55	Jul-60
— TOTAL POPULATION US	321,363	333,896	346,407	358,471	369,662	380,016	389,934	399,803	409,873	420,268
— Black	42,532	44,810	47,064	49,246	51,348	53,412	55,474	57,553	59,662	61,822
— AIAN	4,042	4,328	4,613	4,889	5,154	5,407	5,650	5,881	6,100	6,308
— Asian	17,009	18,884	20,830	22,833	24,849	26,838	28,798	30,726	32,613	34,448
— NHPI	749	824	898	969	1,039	1,107	1,174	1,241	1,306	1,367
— White (Not Hispanic)	198,449	199,313	199,557	198,817	196,886	193,887	190,221	186,334	182,531	178,951
— White (Hispanic)	50,276	56,033	62,204	68,787	75,608	82,551	89,577	96,625	103,651	110,636

Source: US Census Bureau Population Projections – Middle Model July (snapshot) 2015 – 2060.

According to the Census report, on Geographic Concentration of high income households (top 5% of household income -over \$191,499 in 2010), the metropolitan areas of New York and Northern New Jersey, the Los Angeles Metro area including Long Beach and Santa Ana, Chicago, Houston, and Philadelphia, Washington DC, Miami-Ft.Lauderdale, Atlanta and Boston round out the top ten areas with the highest number of high-income households in the U.S. The Chart below showing the top 10 states where skiers and snowboarders reside matches the pattern of high income households. Most snow sports participants live in more densely populated metropolitan areas including New York, Boston, Chicago, Southern California, Detroit, Denver and Seattle.

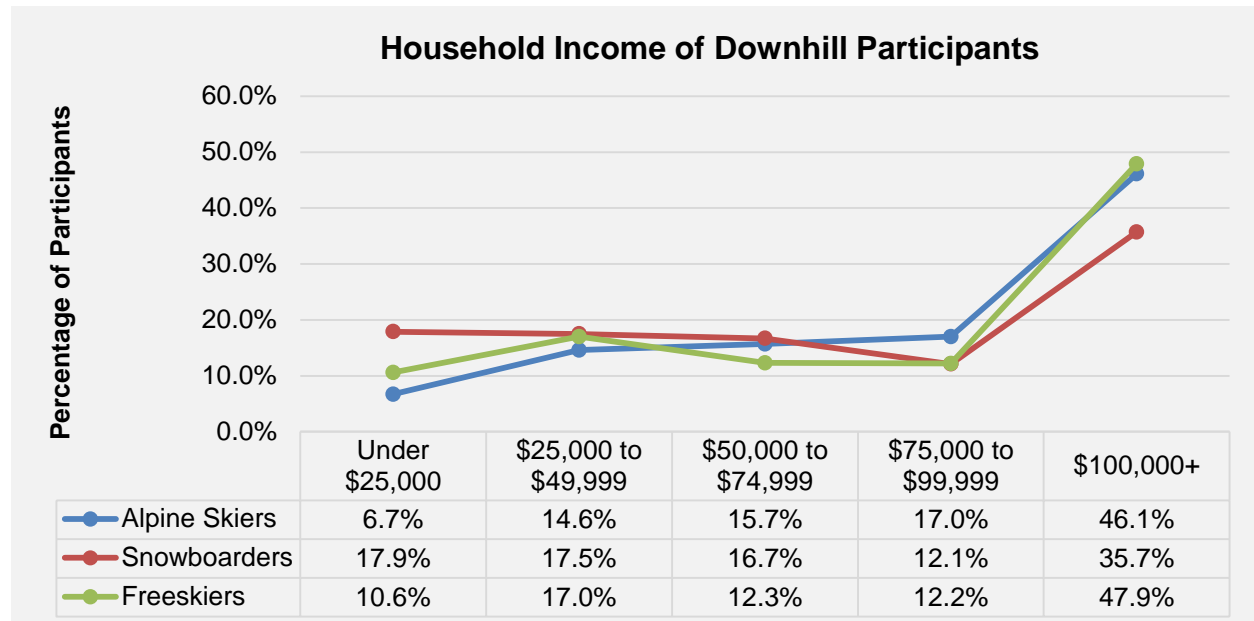


Source: SIA Participant Study, data produced by the Physical Activity Council



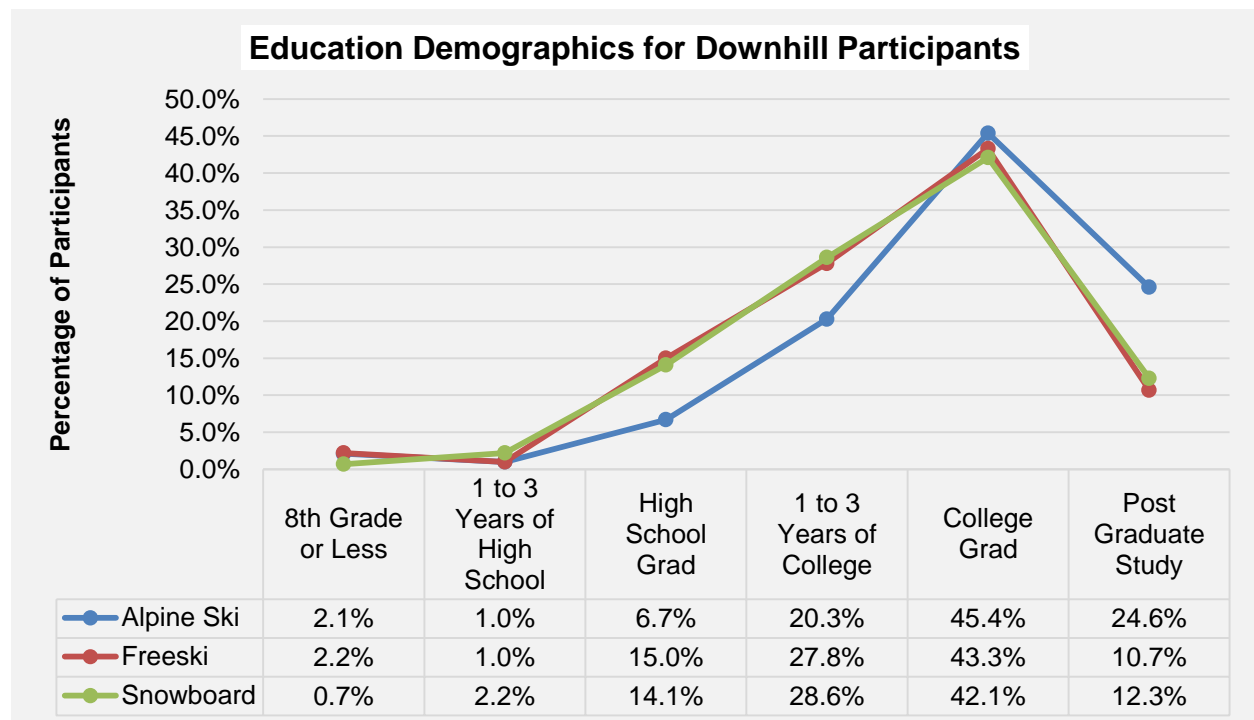
Source: U.S. Census Bureau, the Geographic Concentration of High Income Households 2007-2011





Source: SIA Participant Study, data produced by the Physical Activity Council

Furthermore, the percentage of persons with high educational attainment is highly correlated with high-income households.



Source: SIA Participant Study, data produced by the Physical Activity Council



“The highest concentration of college graduates was in the District of Columbia, where 49 percent of adults had a bachelor’s degree or more education. In addition to the District of Columbia, more than 1 in 3 adults had at least a bachelor’s degree in the following states: Colorado, Connecticut, Maryland, Massachusetts, New Jersey, and Virginia.” – Educational Attainment in the United States: 2009 (Issued by the Census Bureau February 2012).

These high-income, high education locations are likely to be most fruitful for snow sports messaging efforts to grow the participant base because they have the highest number of persons who are in the snow sports demographic in terms of income and educational attainment. Metro areas often considered to be the heart of snow sports participation including Denver (number 21 on the high-income household list with 6.3% of households in the high income category), and Salt Lake City, UT (number 48 on the list with 4.4% of households in the high income category) are geographically significant for snow sports participants but may not be the best demographic targets for snow sports messaging designed to reach the largest number of potential participants based on empirical demographic data.



Cultural and Attitudinal Shifts in the Downhill Snow Sports Participant Base

Snow sports participants are young, they have always been a young target audience and the data show that the pattern of age distribution has changed little over the past 15 years, particularly as snowboarding gained a critical mass of participants. Fifteen years ago, the values of Gen X (born 1965 to circa 1980) dominated the participant base, particularly in the snowboard category sports base that had nothing but youthful participants in the 1990s. The Baby Boomers (Born 1945 to circa 1964) still held their claim on the values of downhill skiing 15 years ago but that has shifted to a more mature Gen X and the children of the Baby Boom generation, the prolific Generation Y, a.k.a. The Millennials (born 1981 to circa 2001). Now Generation Z is taking their place in the snow sports base and future research will determine what characteristic mark they will make on snow sports.

"People resemble their times more than they resemble their parents.' Gen Y'ers are children of the cyber revolution. Just like the Industrial Revolution changed lifestyle and culture by the end of the nineteenth century, the omnipresent connectivity and digital advancement has reshaped the social DNA of our current and future youth generations." Joeri Van den Bergh and Mattias Behrer in their book *How Cool Brands Stay Hot: Branding to Generation Y.* "

The Generations of Skiing and Snowboarding

Total Participants	Snowboard	Alpine	Freestyle
Total Participants (all ages) 1+ times	7,351,000	8,243,000	5,368,000
Number of Baby Boomers (55+) 1+ times	1%	6%	3%
Number of Gen X (35 to 54) 1+ times	19%	33%	24%
Number of Gen Y (18 to 34) 1+ times	51%	37%	50%
Number of Gen Z (under 18) 1+ times	29%	24%	23%
Female Participants			
Total Participants (all ages) 1+ times	2,396,000	3,305,000	1,945,000
Number of Baby Boomers (55+) 1+ times	0%	3%	2%
Number of Gen X (35 to 54) 1+ times	17%	27%	20%
Number of Gen Y (18 to 34) 1+ times	60%	40%	55%
Number of Gen Z (under 18) 1+ times	23%	30%	24%
Male Participants			
Total Participants (all ages) 1+ times	4,955,000	4,938,000	3,423,000
Number of Baby Boomers (51-70) 1+ times	1%	9%	3%
Number of Gen X (35 to 54) 1+ times	20%	36%	26%
Number of Gen Y (18 to 34) 1+ times	47%	35%	47%
Number of Gen Z (under 18) 1+ times	32%	20%	23%

Source: 2013 SIA Snow Sports Participants Report – data produced by the Physical Activity Council

	Gen Z 2002 to Present	Gen Y 1985 to 2001	Gen X 1965 to 1984	Baby Boomers 1945 to 1964
Number	62M	63M	61M	60M
Buying Power	TBD	\$170B	\$125B	\$200B

Sources: Forbes, U.S. Census Bureau

The Baby Boom Generation

The Baby boom generation dominated snow sports from the late 1960s through the 1980s bringing millions of participants to the mountains and spending millions of dollars on gear. In 1976, according to A.C. Nielsen's Confidential Report to SIA "On the Sport of Snow Skiing" there were 10,502,000 downhill skiers in the U.S. Most Baby Boomer skiers were in the 18 to 34 age bracket then and they made up nearly one third of the entire market. Today, the spending power of Baby Boomers is still significant in the snow sports market, but they make up just 5% of the downhill participant base. Nowadays, they are encouraging grandchildren to ski and snowboard and are buying snow sports gear for the family. Although as participants, they were once prolific; as a target audience today their roles as elders in the family are most likely more important than their personal participation behavior in snow sports.

Generation X

Generation X dominated the snow sports market from the early 1990s to the early 2000s and brought snowboard to the snow sports market. This generation is often characterized as apathetic, cynical, anti-authority and tribal. Gen X was the first generation that typically saw both parents head to work each day, they were on their own and expected to be independent. In fact, this generation was also known as "latchkey" kids because so many lived in double income households and carried a house key on a chain around their neck to get into the empty house when they arrived home from school. Gen X grew up in the shadow of the Cold War with threats of "Mutually Assured Destruction." They watched the "Free Love" movement end when people began dying of AIDS. They were told to "Say No to Drugs" and were sold "hair metal" as a music genre. These were interesting times, who could blame Gen X for being fiercely independent, a bit cynical, and tribal. The next phases of the DCIP will question the role of Gen X as both parents and participants in today's (and tomorrow's) snow sports market. That research should indicate the best way to target members of this generation to reach them specifically in their current role as heads of families but with consideration for their unique perspectives as pioneers of action sports.

A Special Note about Gen X and Snowboarding

According to the 1995 NSGA participation Study, in 1994 there were 10,620,000 downhill skiers participating and 49% of them were between the ages of 18 and 34 years old, an age category occupied by Gen X at that time. Additionally, there were 3,627,000 snowboarders and 1 in every five were Gen X members. In fact, as pioneers, Gen X defined the original values of the snowboard community and they brought snowboarding to the mainstream through the newly minted Winter X Games (1997) and the inclusion of snowboard in the 1998 Winter Olympics in Nagano, Japan.

"Well, I identify myself as a snowboarder,' or 'I identify myself as an inline skater, and then that says a lot about the music I listen to and the clothes I wear and the kind of movies I like to go and see."

Ernest Lupinacci, a writer for Weiden & Kennedy.
(November 30, 1998 – CNN)

By the time snowboarding went mainstream in the early to mid-2000s, the Millennials had taken over the sport and began to overlay their values on the category and their values are very different.

"It is not surprising, perhaps, that extreme sports are big business. What is surprising to people who are new to them is the level of athletic ability required to compete in extreme sports at their highest level. Once derided as a tribe of pot-smoking slackers, many of the athletes here are now of the world-class, year-round-training variety, men and women who compete on professional circuits around the world and are supported by commercial sponsors." – NY Times, January 28, 2005 Bruce Weber

Generation Y has taken action sports, including snowboarding and freeskiing to new levels. They brought a level of athletic professionalism with them and left the more anti-authority and counter-culture ideas of Gen X behind.

"The Millennial Generation will entirely recast the image of youth from downbeat and alienated to upbeat and engaged—with potentially seismic consequences for America." – Neil Howe and William Strauss, Millennials Rising: The Next Great Generation



This is a normal part of aging in any sport, and majority rules, when there are more Generation Z members snowboarding, their values will become dominant. The next phases of the DCIP research will examine the dominant cultural values related to snowboard and explore how they may change as Generation Z, the children of Gen X, snowboard's pioneers, inherit the category.

Generation Y – The Millennials

Generation Y currently represents snow sports participants between about 18 and 34 years of age and makes up half of all downhill ski and snowboard participants. Overall, this generation is 63 million strong and it is the largest generation in history. Many researchers have worked to describe the attitudes and traits of this generation and have done so with labels like family-oriented, narcissistic, collaborative, entitled, attention-craving, tech-savvy, and communicators. Although these labels may help define persons born into Gen Y, they don't adequately describe why this generation exhibits these traits and understanding why is crucial to building a strategy to influence this group, i.e. successful marketing campaigns. Every generation develops traits in response to the environment they are born into and Gen Y is no exception.

Gen Y was the first generation born into the information age, members of Gen Y pioneered social media and most have enjoyed instant access to information and new vehicles for communicating with each other and with the world. This generation's entry into the workforce is significantly affected by one of the most severe economic downturns since the Great Depression and data suggest that the impacts of that will remain throughout the Gen Y professional journey. Gen Y came of age in a more open society and consequently, tends to be more open to differing views on sex, culture, and a wide array of social issues. Millennials experienced the first foreign terrorist attack on U.S. soil on 9/11/2001 when they were children and have come of age in the aftermath of that event. There are more Gen Y females than males earning college degrees and women increasingly fill the role of family bread winner. Just like every generation, Gen Y is a product of their environment, members have adapted to the world they were born into. The next stages of the DCIP research will delve in to the

ways in which Gen Y are participating in snow sports, how they are buying products, and how we can ensure that they are willing to continue participating and bring their kids into the snow sports community.

Generation Z

Generation Z is more than 60M strong and are the children of the fiercely independent latchkey kids of Gen X and the spearhead members of Gen Y. We don't know as much about this cohort because they are still developing. In fact, we know less about their preferences and attitudes than any other generation in snow sports. Here's what we do know, that this is a generation born into the age of technology, they are the first "technology natives" and are expected to take technology into directions only dreamed of by previous generations. They will be faced with the impacts of climate change more than any previous generation. They have never known what the world was like before the rise of global terrorism. They were raised by parents who have curated their lives, and stayed intimately involved in the details of their day-to-day activities. They already are attributed with almost \$200M in spending power, but the vast majority of that power still rests with their parents and their grandparents.

Currently, about 1 in every 3 downhill participants is under 17 years old and a member of Gen Z. Their impact on snow sports so far appears to be in their attitude towards snow sports. They just want to have fun but it isn't as central to their lifestyle as it was for previous generations. They love using technology on the mountain including apps that provide information about their performance and action cameras that allow them share their experiences on social media. They are building all kinds of terrain park features in back yards across the country to ski and ride closer to home, there are more than 80,000 videos on YouTube with "ski or snowboard" and "back yard" in the title and most feature kids doing some very innovative things on skis and snowboards. The next phases of the DCIP will focus on the attitudes, preferences, endemic trends, and behaviors of this generation in snow sports. It will be critical to the industry to monitor this generation as it matures and takes the dominant position in the snow sports market.



Past Research – A Sample of Key Findings and Recommendations 1975 - 2000

1975 – More People on Skis. Conducted by the American Ski Federation and presented by Glendenning Associates

Glendenning's analysis of the market data concluded that the participation rate in skiing was 5% of the population (over 10 years old). Additionally, review of the NSGA sporting goods retail data indicate that the rate of ski equipment sales growth lags significantly behind sales increases of other sports equipment. Two factors that are spurious but nevertheless affected the market included the energy crisis and poor snow conditions in the East. "Despite the fact that the industry believes skiers that lapsed due to poor snow conditions and gasoline scarcity will return to the slopes, it is quite probable that these drop-outs will have found alternatives to skiing."

Key Findings [verbatim]:

Two main factors are contributing to historic low levels of skiing participation:

1. The ski product has consumer negatives, both inherent and perceived. In the absolute and vis-à-vis alternatives for the consumer's recreation dollar. (Negatives include: Skiing is physically demanding and only those in their 20s or younger have the stamina to learn and continue participating as evidenced by the skewing of participant base to the young, perceived risk of injury, long drives to the ski area, and expense of skiing).
2. The marketing of these products in which the industry has historically spoken to the converted, and has not taken the steps necessary to generate trial among qualified non-participants.

Demographic data indicate that potential exists to generate new skiers in specific segments, although the thrust of this effort will always have to concentrate on the segments' upper income group.

Various segments:

- Young people age 10 to 18, both male and female. This segment (est. 10% of current participant base) has great potential because of their ease of learning, enjoyment of the cold weather, etc.
- Women, single and married to skiers. Currently, 65% of skiers are male and only 50% are married. This indicates that in many instances, husbands ski but wives do not.
- Young adults age 18 to 24, both male and female. Currently, this segment represents (est.) 25% of the skier participant base. They are demographically prime targets and college students should be the primary target within this group due to their potential for income.
- Persons with access to day ski areas – areas that are a 2 hour or less drive from their residence. Day areas have the outstanding potential as new skier trial generators. Skiers will move on to destination resorts when they achieve competency in skiing.
- Lapsed participants – skiers that have the income needed, but have dropped out due to other reasons including poor snow and the gas shortage.
- Active sports participants with primary emphasis on upper income and younger age groups. Psychographic data and focus group feedback indicate that the active sports participant is a prime potential skier.
- Friends of skiers. The influence of friends is of primary importance to obtaining new skier trial. Friends may not be difficult to reach, e.g. a high percentage of skiers belong to country clubs.
- The ultimate potential of generating new skier will be related to consumers' awareness of the product (read as skiing in general, not just equipment), and the ability of the industry to make modifications in the product and in how it is perceived by consumers.



Key Recommendations:

Develop a Mid-Week Season Pass

This solution helps ski areas earn more revenue during low capacity times. Additionally, because many skiers are in high income demographic groups (doctors, lawyers, etc.) that are more likely to have time available during the week to ski. Offering them an added incentive (lower cost of season pass) will encourage more skier traffic.

Develop a January Pass

The pass would be good for January only, all days, but would encourage mid-week participation among groups that have more free time during this particular month, specifically women's groups and college students.

Have a Ski for \$5 Campaign with Local Businesses

This would be designed as a tie-in event with local businesses (e.g. Kentucky Fried Chicken stores, local grocery chains, McDonald's/Burger King outlets, etc.) It would offer skiers the opportunity to ski all day midweek for just \$5. This would be aimed at current skiers and at those interested in skiing.

Ladies Days

Run an event to increase and encourage midweek skiing among women. Target women's groups specifically i.e. bridge clubs, country clubs' women's groups, PTA groups etc.

Free Beginner's Lesson with Equipment Purchase

This event/program would offer a free lesson with the purchase of an equipment package including skis, boots, and bindings. This program would target new skiers and is designed as an added incentive to purchase equipment and begin skiing.

1977 – The Future of Skiing. Conducted by Ad Hoc Committee of the American Skiing Federation

Key Findings:

The number of participants skiing is growing, albeit slowly. More than 40% of equipment, apparel and accessories suppliers say that growth is flat.

Key issues identified for the snow sports industry:

- Public perception of the cost of skiing
- Cost and availability of insurance,
- Cost and availability of energy (U.S. in the midst of an energy "crisis" due to Arab oil embargo)
- Skier population trends (slow growth)
- Environmental land issues

Key Recommendations:

- Improve communication with the public about skiing
- Hire an Executive Director and Establish the "Future of Skiing" program to manage various efforts to address key issues including public perceptions of the cost of skiing, environmental issues, energy issues, and other issues in Washington, D.C. as they arise
- Conduct ongoing research on consumer trends, participation, in collaboration with SIA, NSAA and other existing programs and bring the research to the entire snow sports industry.

1978 The U.S. Skiing Market – A Nationwide Study of Skier Behavior, Attitudes and Motivations. Conducted by Skiing Magazine



Key Findings:

- Serious skiers are the cornerstone of the market place.
- They have a greater interest in the sport, more money to spend on it, and are more experienced at it
- They take three times as many ski trips and spend more than three times as much money on these trips
- They are more likely to take ski trips outside the U.S. and more likely to take ski vacations in every region and state within the U.S.
- They represent 43% of all skiers but purchase 70% of all the equipment
- Product quality is important to them and they will spend more to get it – for some products up to 50% more
- They are more likely to own equipment
- They are more information intensive people who use a greater variety of sources in planning their ski trips and purchases and they have a heavier influence on the decisions of other skiers
- Half of all equipment purchases were repeat purchases by experienced skiers
- 7M persons who skied within the last 5 years but did not ski last season

Key Recommendations:

None made

1989 Building Ski Industry Demand – Conducted by McKinsey and Company for the National Ski Areas Association and SnowSports Industries America.

This study was conducted by McKinsey in 1989 due to a slow growth period in snow sports wherein ski area operators were seeing, on average, a 7.5% pre-tax return on assets, the number of skier (not yet including snowboarders) visits had flattened (around 52M) , and suppliers and retailers were not experiencing real growth in revenues. McKinsey reported that this study of the ski industry shows that participants can recharge the ski economy and rebuild demand for the sport by joining forces in a cross-industry marketing effort.

Key Findings:

- The ski market and participant base is in a slow growth period negatively affecting the profitability of industry business.
- U.S. population demographics trends point to a near future for snow sports in which more people are falling into age groups in which fewer people ski (beginning of worry about the Baby Boomers leaving) but in this cohort, those persons who keep skiing tend to ski more frequently offsetting the trends somewhat.
- The cost of skiing is a dominant concern for skiers in almost every segment so the opportunity for further price increases in both service and products “Seems remote.”
- Increasing capacity at off-peak times including weekdays and nights would benefit everyone in the industry. Weekend capacity is high at most areas, but at “close-in” areas (as opposed to destination resorts) capacity can drop to 25% on weekdays.
- Attracting demand to use capacity at off-peak periods could go a long way toward revitalizing the ski economy.

Market research (focus groups) conducted during this project reveals that skiing has distinctive components that set it apart from other recreational activities in the minds of virtually all active skiers. Highest on their list of “like” are the natural beauty of the mountains (78%) and the exhilaration they



experience from the sport (53%). Other elements cited are exercise (23%), the challenge of mastering the sport and the sense of accomplishment when they do (19%) and the camaraderie (10%). Attesting to the pull of skiing is the fact that people seem to identify with these elements almost from the moment they try skiing – and they continue to identify them over time.

Key Recommendations:

“McKinsey believes that through a truly concerted joint marketing effort, the industry can get 3.5M of the 35M potential skiers on the slopes and persuade the 13M present skiers to ski more often.”

Convert Potential to New Skiers - Of the 220M people in the United States who have never skied, 35M have the likely demographics and affinities for the sport to be potential skiers. However, many have never tried it either because they are unaware of its benefits or because emotional and perceptual barriers inhibit them, including high perceived costs, travel/traffic hassles, and risk of injury. The messages to them should be exciting and reassuring:

1. Dwell on the pleasures that await them – the natural beauty of the mountains, the exhilaration, the sense of accomplishment from mastering the sport, the enjoyment of sharing the experience with family and friends. Because these benefits are experiential by nature, people who have never skied consistently underestimate them.
2. Lay to rest fears that tend to be exaggerated by non-skiers – concerns about the cost and injury, anxiety about learning the sport and encourage them to link up with others to get started since virtually no one begins without the company and support of friends or family.

Persuading Existing Skiers to Ski More – Convincing intermittent skiers to visit the slopes four or five times a year instead of every few years – light skiers to go a dozen times a year instead of three or four – requires a different tactic. Although these segments need to be reminded of the positive aspects of skiing, the burden of the message should be on ways to derive new benefits and fun from the sport: increasing confidence in their skiing abilities, finding a ski companion, avoiding transportation “hassles,” lift lines, crowded slopes, by, for example:

1. Highly targeted training programs for people stuck in the “intermediate rut.”
2. Promotion of ski clubs at schools or jobs
3. Easily booked packages that combine all travel, lodging, and lift ticket arrangements.
4. Demand-shifting programs that inform skiers of the costs and benefits of skiing during off-peak periods.

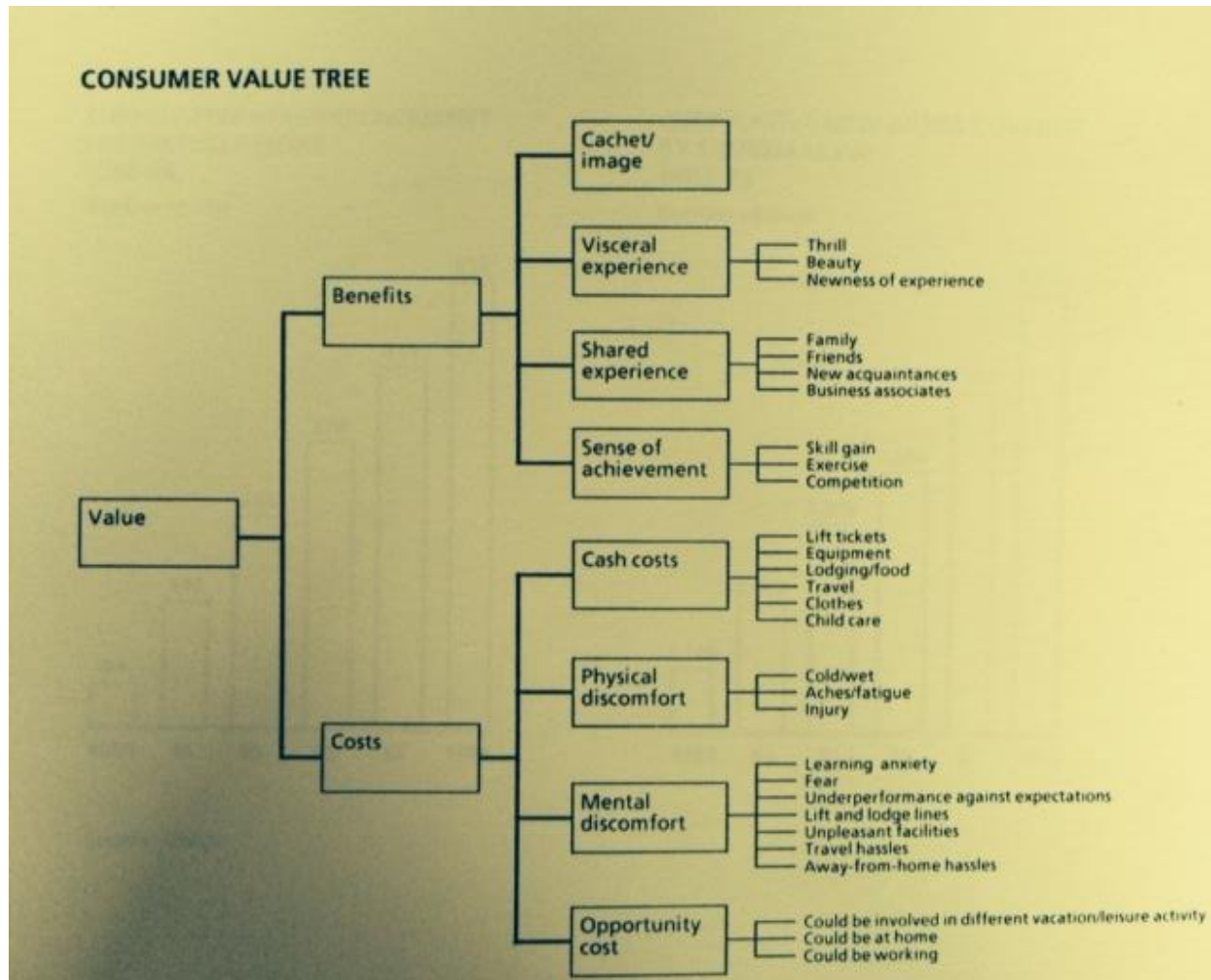
In addition, since many of these skiers are long-time devotees of the sport, they are candidates for targeted marketing to their specific behavioral niches that include



Other interesting findings:

With more women working, the amount of time and energy available for recreation activities declines. This trend may more severely affect skiing than other sports because skiing requires such a large expenditure of time and energy to participate.

Consumers view of benefits and costs of skiing:



2000 Growing the Snow Sports Industry: Marketing Analysis and Strategy for Breaking down the Barriers. Sponsored by SIA and conducted by FocalPoint and Z-Sport

The snow sports industry's ability to market itself efficiently and be profitable has been a challenge. We all know there are various reasons for this and all of them are valid. A careful review of the industry's national marketing projects for the last 20 or so years pointed out a startling revelation. Perhaps we really didn't know enough about our targets, and for that matter, who to target.

In May 1999, the SIA board of directors made a major decision to invest the necessary amount of money to do a market research study that would provide information and knowledge that could be incorporated into the individual marketing planning of companies in all segments of the industry.



We hired Sergio Zyman, the former chief marketing officer of Coca-Cola. His mission and that of his colleagues at Focalpoint and Z-Sport was to identify the handful of potential high-value, but under-performing customer segments that lend themselves to snow sport participation; to develop a strategic framework that will unleash the potential in each of these segments and finally to develop powerful messages and tactics that will motivate the targets.

The program is designed to help define market segments' interest in snow sports. It is not intended to create an expensive advertising campaign. By conducting this program, SIA is providing the industry with a framework of strategic information and resources that each industry member can incorporate into their own existing programs, but that few of us could afford to do on our own. - *From David Ingemie, SIA President May 2000*

Key Findings:

1. **There is a strong relationship between skier/boarder proficiency, enthusiasm, participation and sales.** This is very close to a "formula for success." The data suggests that as a consumer's proficiency at skiing/boarding increases, it pulls with it enthusiasm, participation and sales. As the skier/boarder's confidence within snow sports increases, the confidence grows concomitantly and their investment in the activity follows as a natural byproduct.
2. **The industry is bleeding new triers and participants of low proficiency.** Every industry must grapple with attrition - - customers that fall away over time. However, what is very clear in the snow sports industry is that our customer attrition is not scattered throughout skiers/boarders of all proficiencies; rather it is highly concentrated among those skiers/boarders of lower proficiency.
3. **The greatest marketing opportunity in the snow sports industry lies in reactivating lapsed and upgrading light and moderate users.** It is true in virtually every industry that the most valuable consumers are the heavy users, which in this industry means our "avid/expert/advanced" skiers and boarders. This is a group we don't want to lose and to whom the industry currently focuses an enormous amount of its attention and financial resources.
4. **The new equipment technology can produce significant marketing leverage.** As we discussed briefly under the "Myths and Facts" section, the "make it easier" technology within the skiing/boarding industry (skis, boots and boards) is a marketing opportunity yet to be fully exploited. We began to see evidence of this in our focus group discussions, and in our review of existing research in the marketplace.
5. **Children can be either a significant barrier or motivator to increased skiing/boarding participation.** Not surprisingly, when we asked lapsed skiers what was the main reason they did not ski in the past twelve months, the two issues that came to the top were "time issues" and "children." Among snowboarders, a much younger audience less likely to have children, "no time" and "too expensive" were the top reasons for not boarding more.
6. **Introducing consumers to skiing/boarding at an earlier age, and sustaining their loyalty, will have an exponential impact on industry revenue.** We all can imagine that if consumers have a longer "career" as skiers/boarders that will mean greater revenue to the snow sports industry. However, we discovered there is a much more significant economic factor at play.

Key Recommendations/Strategies:

You will note that the following strategies grow directly out of the previous report sections, "Key Findings" and "A New Approach to the Market."

- **Capture critical customer information** – name, address, proficiency, frequency of participation, etc. The relative handful of customer data points that you will need to be able to focus your resources on your single-most productive market segment ... current/past customers.



- **Invest in growing your skier/snowboarders proficiency** – don't just spend your marketing dollars to promote price; instead, invest those dollars in special offers that involve lessons to increase proficiency and return value over time.
- **Leverage the full potential of season passes** – because season passes are a device to increase the customer's "stake" in snow sports, it is likely to be a productive tactic to increase proficiency, participation and additional sales.
- **Bundle price into a larger value proposition** – to avoid focusing the customer on price, you can bundle a discount offer within a package of benefits of at least equal and probably greater value to the customer such as lessons, lift tickets, meals, child care as a complete "family package."
- **Turn children into motivators** – if you are going to discount, focus on discounting kids, ski school and other tactics likely to get the customer into the activity early, and to make the participation of kids more convenient and less costly for parents (it is the "secret" to McDonald's success).
- **Reward loyalty and heavy users** – create formal recognition for the skier/boarder's increase in proficiency (ski school report cards, equipment upgrade discounts) and acknowledge those consumers who participate more and/or purchase more.
- **Use affinity marketing for recruiting** – if you are going to invest dollars in recruiting "potentials" or other new participants, "wholesale" the activity, don't "retail" it by working with affinity interests such as "Geeks on Skis".
- **Target lapsed skiers/boarders for reactivation** – it appears that the two principal reasons lapsed skiers/boarders dropped out is: 1) the challenge of getting better at the sport; or, 2) the added complexity of skiing/boarding with children. So, focusing on those two barriers with targeted promotions such as "try it again for the first time" will be relevant to these lapsed customers and help your message get through.
- **Target beginners and intermediates for upgrades** – this is a group "on the bubble." They are considering whether snow sports is an activity that gives them enough reward and sense of achievement to successfully compete for their time and pocketbook. Therefore, we should create promotions to increase their proficiency (e.g., "up a notch in a week") and reinforce their sense of achievement (e.g., graduation certificates).
- **Focus on children's lifetime value** – view an expenditure on a child (whether a discount on a helmet or on ski school) as an investment that will produce a broad return over time, including the participation of their parents. Further, their satisfaction with their growing proficiency and participation will be associated with your resort, retail outlet or equipment brand and their loyalty will follow.

Conclusion

The snow sports industry has found itself in the current position of slow growth, or lagging participation several times over the past forty years and does what any wise industry would do – conduct research into why it isn't growing and how to turn the situation around. The evidence collected during the Discovery phase of the 2014 Downhill Consumer Intelligence Project indicates that this exercise in research, conducted about once every ten years has not led to any period of rapid growth in the market or in the participant base. These efforts have led to a keen understanding of the demographic make-up of the participant base, of the common barriers to entry and participation in snow sports, and in traditional ways to grow the sport. While the recommendations and programs that have followed have not spiked sales and participation, they may have helped the industry understand our consumers well enough to stem any significant declines in participation and sales. In the next phases of the DCIP, we will examine our consumer base once again to ensure we maintain this keen understanding, but we also will examine why past programs built from the recommendations of past research failed to grow the base, and what new paradigm-busting programs have potential to grow the sport today.



Appendix A

Here is some information about these key datasets used on an ongoing basis with comparable Y/Y or rather season/season comparability:

- SIA [PAC] Participant data – number and demographics of snow sports participants and lapsed participants. This data comes from a larger study of physical activity in the U.S. based on approximately 40K interviews each year. This is the data that appears consistently in the SIA Participant study and is used in the SIA Intelligence Reports and a variety of other SIA reports and presentations ad hoc. This data also contains valuable information about participants who have lapsed and why they lapsed. Most frequent reason – no time to participate.
- NSGA [National Sporting Goods Association Participant Data – Whenever we discuss this dataset, one that has a 30 year trend line, we discuss the source, the difference in its definitions of a participant (compared with our participant data from the PAC), and the difference in the methodology used to obtain the results. This may be where some of your frustration about multiple datasets lies. As long as we understand the differences in methods and definitions, it can be useful to examine two mutually exclusive datasets that are designed to measure the same thing. Particularly when one of the datasets gives some historical perspective. From a mathematical standpoint, this study is far less accurate than the PAC data but overall, despite issues with accuracy, the data is reliable over time. That means it can be used as a guide in long-term participant trends – which is why we use it that way.
- SIA RetailTRAK™ data produced by Leisure Trends – This is our retail sales data. SIA has worked with Leisure Trends for more than 30 years on this dataset. This retail sales data is used to describe activity in the snow sports market in various press releases, in the Intelligence Reports, in virtually every presentation made on the snow sports market.
- Sales and Orders data – this is wholesale data collected from suppliers on wholesale sales and orders. This data is only discussed at the topline level publically. We have hard goods whole data on end of season sales and orders dating back to 1988.
- NSAA Kottke Skier/Rider Visits – this data is taken from the NSAA Kottke End of Season Report. We typically provide a trend line on this data beginning in the 1996/97 season but we could report data from the 1980s and early to middle 1990s. This data includes resort visits, lessons [ski and snowboard], and % of snowboard visits. Additionally, this report provides data on various resort features including park and pipe, lift ticket prices, regional visit data and more.



The DCIP Web Page – Under Construction

The screenshot shows a web browser window with the URL www.snowsports.org. The page features a navigation bar with links for SUPPLIERS & SERVICE PROVIDERS, REPS, RETAILERS, MEDIA, TRADE SHOW, CONSUMERS, ABOUT SIA, and SIA'S LATEST. A search bar is located in the top right corner. The main content area is titled "The Downhill Consumer Intelligence Project" and includes a large image of a skier. Below the title, there is a section for "Purpose, methods and time frame." followed by placeholder text. A blue banner below this section reads "Providing snow sports research & industry insights since '78". The page is divided into a grid of 16 content blocks, each with a title, a brief description, and a "View" button. The blocks are: 1. The Downhill Consumer Intelligence Project (Find past and present press releases from SIA and the snow sports industry. View the SIA Press Releases. View the Project >); 2. Executive Summary of Research to Date (Our executive summary offers an incredible range of research covering everything from participation to orders to sell through. View the Summary >); 3. Key Datasets (The annual SIA Snow Show at the Colorado Convention Center in Denver, CO followed by the On-Snow Demo/Ski-Ride Fest at Copper Mountain Resort is the largest, globally known snow sports trade show. View the Datasets >); 4. Of consumers find creative ways to merchandise that are easy to do (71%); 5. Of consumers have been tracking the SIA Snow Show since 1979; 6. Key Trends (The annual SIA Snow Show at the Colorado Convention Center in Denver, CO followed by the On-Snow Demo/Ski-Ride Fest at Copper Mountain Resort is the largest, globally known snow sports trade show. See the Trends >); 7. Snow Sports Consumer Research History (Find past and present press releases from SIA and the snow sports industry. View the SIA Press Releases. View the Research >); 8. Growth Efforts in Related Industries (Our executive summary offers an incredible range of research covering everything from participation to orders to sell through. View the Efforts >); 9. What Snow Sports Consumers are Saying (The annual SIA Snow Show at the Colorado Convention Center in Denver, CO followed by the On-Snow Demo/Ski-Ride Fest. View the Quotes >); 10. Current Snow Sports Growth Programs (Our executive summary offers an incredible range of research covering everything from participation to orders to sell through. View the Programs >); 11. Of consumers in 2013 purchased more product online versus 38% via traditional merchandising stores (65%); 12. DCIP Collaborators (Find past and present press releases from SIA and the snow sports industry. View the SIA Press Releases. See the Results >); 13. Ask SIA Research (SIA Members, are you looking for a spot to submit your consumer related questions? Look no further. Our research department is available year round to answer all your snow sports needs. Submit Your Questions >); 14. Of SIA Members have 2 or more questions answered by our research team annually; 15. Field Notes (Our field notes summarize all our national & globally collected consumer research and combines them into one clear, concise handy little package. Get the Field Notes >); 16. Submit Your Questions >). The footer contains sections for "Stay Connected" (with an email input field), "About SIA" (History, Board of Directors, Staff Directory, Committees, Environmental, Government Affairs, K.I.D.S. Program), "Subsidiary Sites" (SIA Snow Show, Snowlink, Snow Sports Insiders, Ship Your Gear, Winter Trails, Winter Feels Good), "Industry Supporters" (FedEx, YRC Freight), "Find Us" (social media links), and a "314 DAYS 2014 Countdown" graphic. The footer also includes the SIA logo, copyright information, and a "Web Design & Hosting provided by Sage Island" note.

DCIP Collaborators

1. National Ski Areas Association - <https://www.nsaa.org/>
2. Pennsylvania Ski Areas Association - <http://www.skipa.com/>
3. ISkiNY - <https://www.iskiny.com/>
4. Ski Utah - <http://www.skiutah.com/>
5. SkiNH - <http://www.skinh.com/>
6. U.S. Ski and Snowboard Association - <http://ussa.org/>
7. National Golf Foundation - <http://www.ngf.org/>
8. Tennis Industries Association - <http://www.tennisindustry.org/cms/index.cfm?>
9. Outdoor Industries Association - <http://outdoorindustry.org/>
10. RRC Associates - <http://www.rrcassociates.com/>
11. Label Networks - <http://www.labelnetworks.com/>
12. Vail Resorts - <http://www.vailresorts.com/Corp/index.aspx>
13. Mammoth - <http://www.mammothmountain.com/>
14. Protect Our Winters - <http://protectourwinters.org/>
15. Professional Ski Instructor Association - <http://www.thesnowpros.org/>
16. Transworld Business - <http://business.transworld.net/>
17. Leisure Trends, a NPD Group Company - <https://www.npd.com/latest-reports/leisure-trends-npd-group/>
18. Breakaway Research Group - <http://breakawayresearchgroup.com/>
19. NOAA National Climatic Data Center – <http://www.ncdc.noaa.gov/>
20. SnoCru - <http://snocru.com/>
21. International Association of Skateboard Companies - <http://theiasc.org/>
22. Snowsports Industries Australia – THEIR SITE IS DOWN....BUT HERE IS THE LINK - <https://www.siaaustralia.com.au/>
23. National Sporting Goods Association - <http://www.nsga.org/i4a/pages/index.cfm?pageid=1>
24. Sports and Fitness Industries Association - <https://www.sfia.org/>

Snowsports.org Snowlink.com #SIAdata

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