

END OF SEASON 2022-2023 (AND A LOOK AHEAD AT 2023-2024)

A REPORT OF SURVEY FINDINGS FROM ENTHUSIAST PARTICIPANTS



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BACKGROUND

OVERVIEW

This research, conducted via online survey among SIA's panel of Snowsports Enthusiasts, is designed to help SIA members keep informed about changes in snowsports consumer behaviors.

Topics include:

- Participation
- Expectations vs. reality for the 2022-23 season
- Expenditures
- Expectations for the 2023-24 season

Findings from the April 2023 survey are compared to those from April 2022 and April 2021, where applicable, to understand how sentiment, expectations, and experiences have changed over time.

RESPONDENT DEMOGRAPHICS

	April '21	April '22	April '23
Age			
<45	18%	23%	21%
45-64	57%	49%	49%
65+	24%	28%	30%
Gender			
Male	64%	74%	68%
Female	36%	25%	32%
Prefer to self-describe	1%	1%	0%
Sexual Orientation			
Heterosexual	96%	96%	96%
LGBTQ+	4%	4%	4%
Marital Status			
Married/Living with Partner	75%	73%	75%
Single/Never Been Married	12%	18%	16%
Separated/Divorced	11%	7%	8%
Widowed	2%	2%	1%
Children in Household			
Yes	36%	19%	21%
No	64%	81%	79%
Region			
Northeast	49%	38%	53%
West	34%	46%	33%
Other	16%	15%	14%

	April '21	April '22	April '23
Ethnicity			
White/Caucasian	93%	94%	93%
Asian	2%	5%	4%
Hispanic, Latino/Latina, or Spanish origin (any race)	2%	2%	3%
Black/African American	1%	1%	1%
American Indian or Alaskan Native	1%	1%	1%
Native Hawaiian or Other Pacific Islander	0%	0%	1%
Other	3%	2%	2%
Household Income			
\$0 to \$49,999	7%	9%	10%
\$50,000 to 99,999	25%	25%	23%
\$100,000 to \$149,999	25%	27%	24%
\$150,000 to \$199,999	19%	17%	18%
\$200,000 or Greater	24%	22%	25%
Participant Type			
Social skier/boarder/biker/other	52%	51%	45%
Health conscious	45%	55%	40%
Family/parent	39%	35%	29%
Aspirational/lifestyle	41%	49%	48%
Solo skier/boarder/biker/other	32%	35%	33%
Vacationer	34%	36%	27%
Hard core	35%	44%	36%
Casual/infrequent/fair-weather skier/boarder/biker/other	12%	14%	10%
Competitor/Athlete	11%	15%	11%
Beginner	2%	2%	2%
Non-participant/Purchaser-only	1%	0%	1%
Other	7%	11%	8%

RESPONDENT ACTIVITY PROFILE

This table summarizes the profile of survey respondents.

When interpreting the results of this study, it is important to consider that this is *not* a random sample of all snowsports participants. Instead, **these data represent the opinions of individuals who are engaged enough in the sport to either attend snowsports expos or to be interested in communications from SIA.**

Throughout this report, we refer to these respondents as “Enthusiasts” in order to distinguish between this group of respondents and all snowsports participants as a whole.

	April '21	April '22	April '23
Percentage Participating Over the Last 12 Months			
Resort - Skiing	84%	83%	82%
Winter running/hiking	41%	43%	34%
Snowshoeing	35%	39%	21%
Sledding	30%	23%	15%
Cross-country skiing	25%	28%	19%
Resort - Snowboarding	18%	26%	17%
Backcountry - AT	12%	17%	14%
Resort - Uphill	14%	19%	12%
Snowmobiling	10%	11%	7%
Resort - Telemark	6%	9%	5%
Backcountry - Snowboard	4%	7%	3%
Fat bicycling	6%	5%	4%
Backcountry - Telemark	6%	5%	3%
Ice climbing	1%	2%	1%

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KEY TAKEAWAYS FROM SNOWSPORTS ENTHUSIASTS

SNOWSPORTS PARTICIPATION

Snowsports Activities

2020-21 vs. 2021-22 vs. 2022-23 Participation

(all levels of participation included – activities with the most participants shown)

	 Resort Skiing	 Winter Running/Hiking	 Snowshoeing	 Cross-Country Skiing	 Resort Snowboarding
April 2021	84%	41%	35%	25%	18%
April 2022	83%	43%	39%	28%	26%
April 2023	90%	61%	40%	38%	35%

Participation in specific snowsports generally remained steady or increased in the 2022-23 season. While snowshoeing saw a negligible increase, resort skiing, winter running and hiking, cross-country skiing, and resort snowboarding saw greater increases this season.

SNOWSPORTS PURCHASES

Percent Making Snowsports Purchases

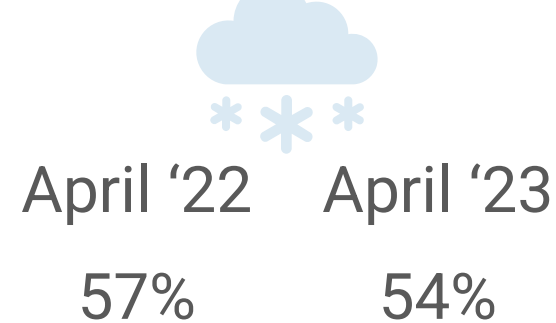
Expectations vs. Actual Purchases
(among snowsports Enthusiasts)

	 Apparel	 Accessories	 Ski Area Season Pass(es)	 Ski Area Lift Ticket(s)	 Gear Services	 Gear purchases
April 2022 Expected to purchase	52%	43%	73%	43%	53%	52%
April 2023 Reported purchasing	64%	47%	67%	41%	46%	47%

Enthusiasts underestimated their purchasing of apparel going into the 2022-23 season. However, Enthusiasts overestimated their purchasing going into the 2022-23 season for gear and services related to their gear. For accessories and ski area lift tickets, Enthusiasts generally purchased in 2022-23 close to what they expected when looking ahead to the season back in April 2022.

EXCITEMENT AND VACATION PLANS

Excited for Snowsports Next Year



Excitement for the coming season (2023-24) is essentially flat compared to excitement for the 2022-23 season last April. Coming out of the pandemic, we saw a lot of excitement around snowsports (68% excited), and we may now be seeing this return to more moderate levels.

Snowsports-Focused Vacation Plans for the 2023-24 Season



Despite more moderate levels of excitement, interest in travel is still strong. In April 2022, when looking ahead to the 2022-23 season, 35% of Enthusiasts reported plans to take a snowsports-focused vacation in the next season (not shown). In April 2023, when looking ahead to the 2023-24 season, 56% of Enthusiasts reported plans to take a snowsports-focused vacation next season.



DETAILED RESULTS

REPORTING NOTES

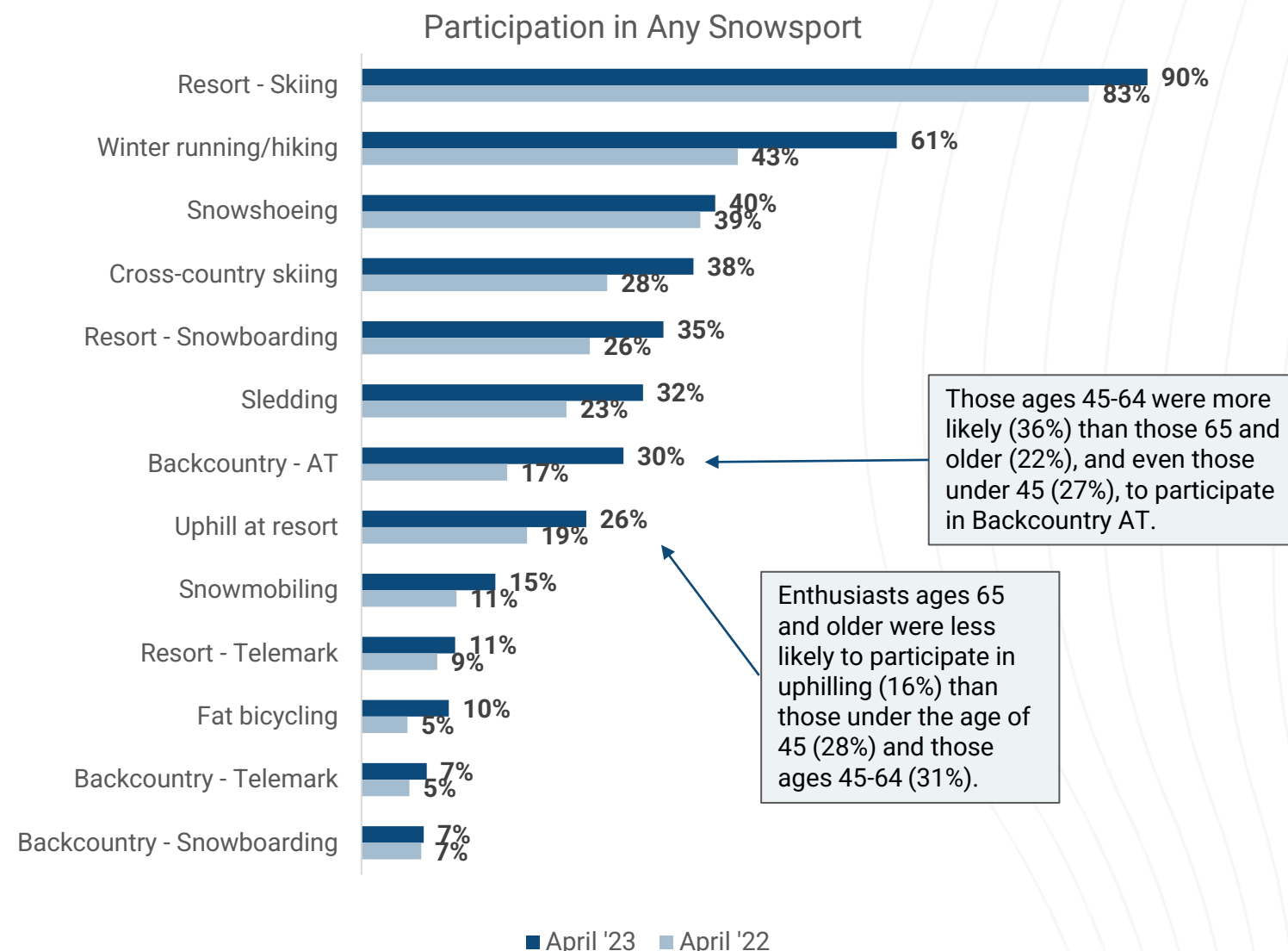
When interpreting the results of this study, it is important to consider that this is *not* a random survey of all snowsports participants. Instead, these data represent the opinions of individuals who are engaged enough in the sport to either attend snowsports expos or to be interested in communications from SIA.

Throughout this report, we refer to these respondents as “Snowsports Enthusiasts” in order to distinguish between this group of respondents and all snowsports participants as a whole.

SNOWSPORTS ACTIVITIES

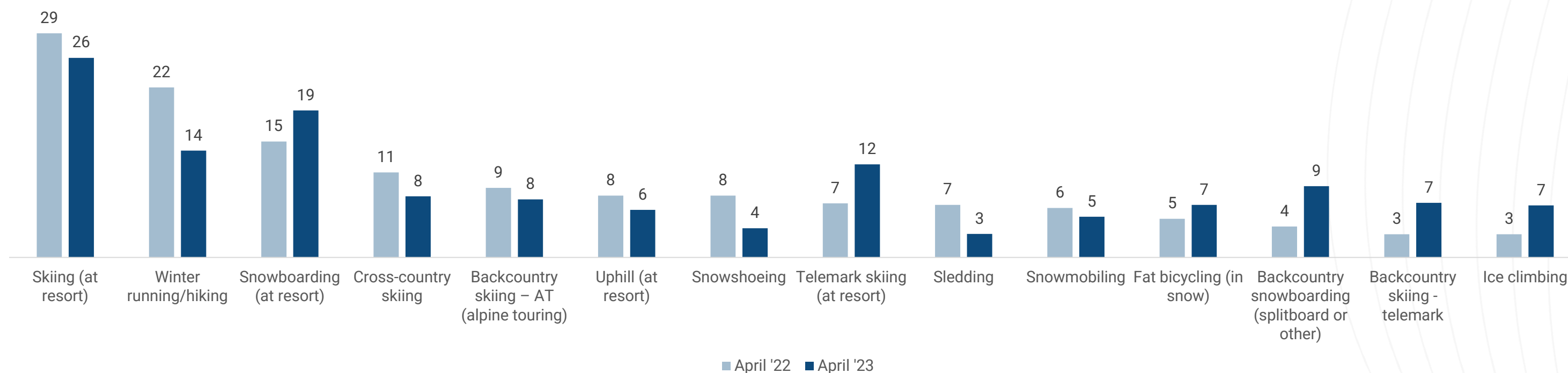
Participation in snowsports remained steady or increased across all listed sports from 2022 to 2023.

- From 2022 to 2023, all listed snowsports saw either a steady amount of participation or an increase in participation among Enthusiasts.
- Skiing at a resort was more common among Enthusiasts ages 65 and older (97%) than it was among those under the age of 45 (74%). Younger Enthusiasts were more likely to have participated in snowboarding at a resort.
- Winter running/hiking saw the largest increase, with around two fifths (43%) participating in the 2021-22 season, and three fifths (61%) participating in 2022-23.
- Backcountry AT skiing also saw a large increase, with just under one in six Enthusiasts (17%) participating in 2021-22, and just under one third (30%) in 2022-23.



The average number of days spent resort skiing remained relatively steady.

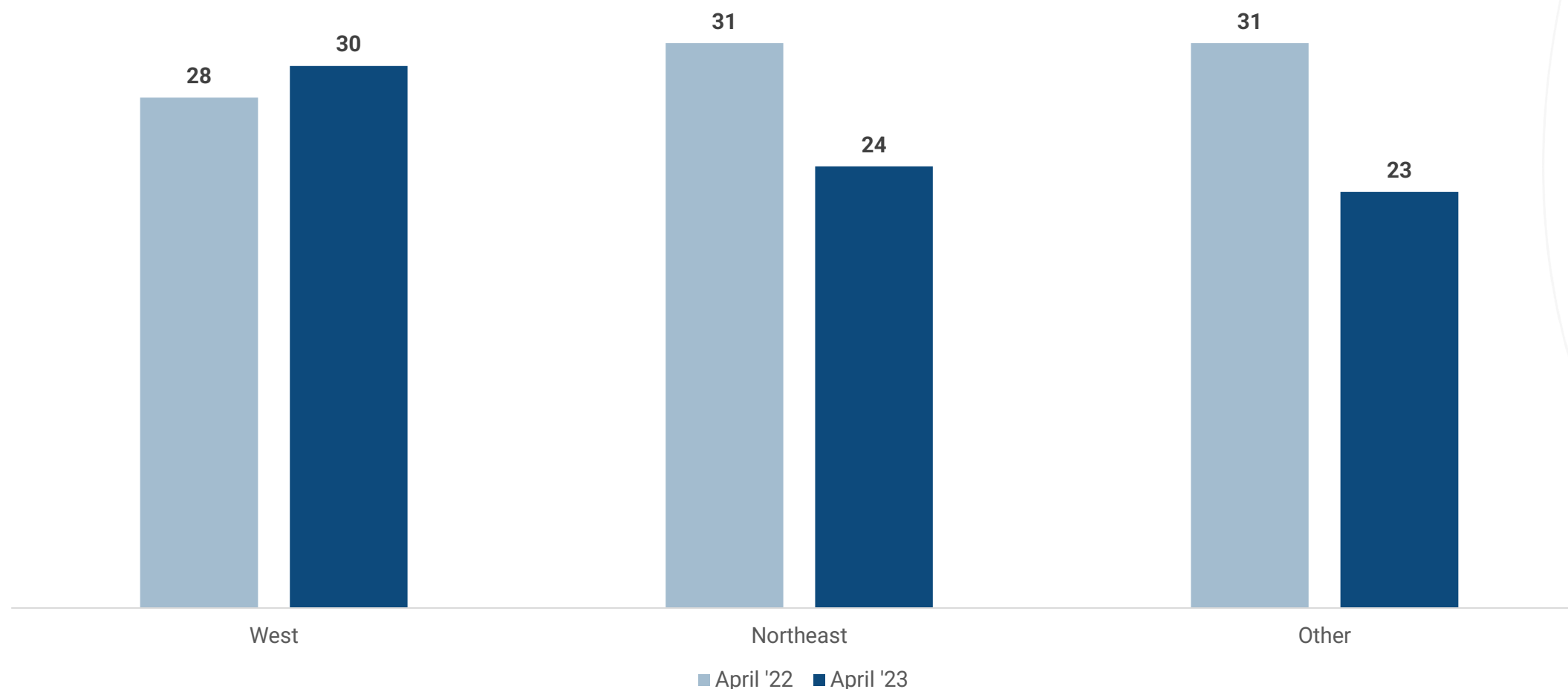
Average Days Spent Among Enthusiasts
Excludes Enthusiasts who Did Not Participate



The average number of days that Enthusiasts reported participating in resort skiing remained relatively steady from April 2022 to April 2023. While more Enthusiasts reported winter running or hiking, the average number of days they spent participating in this activity decreased.

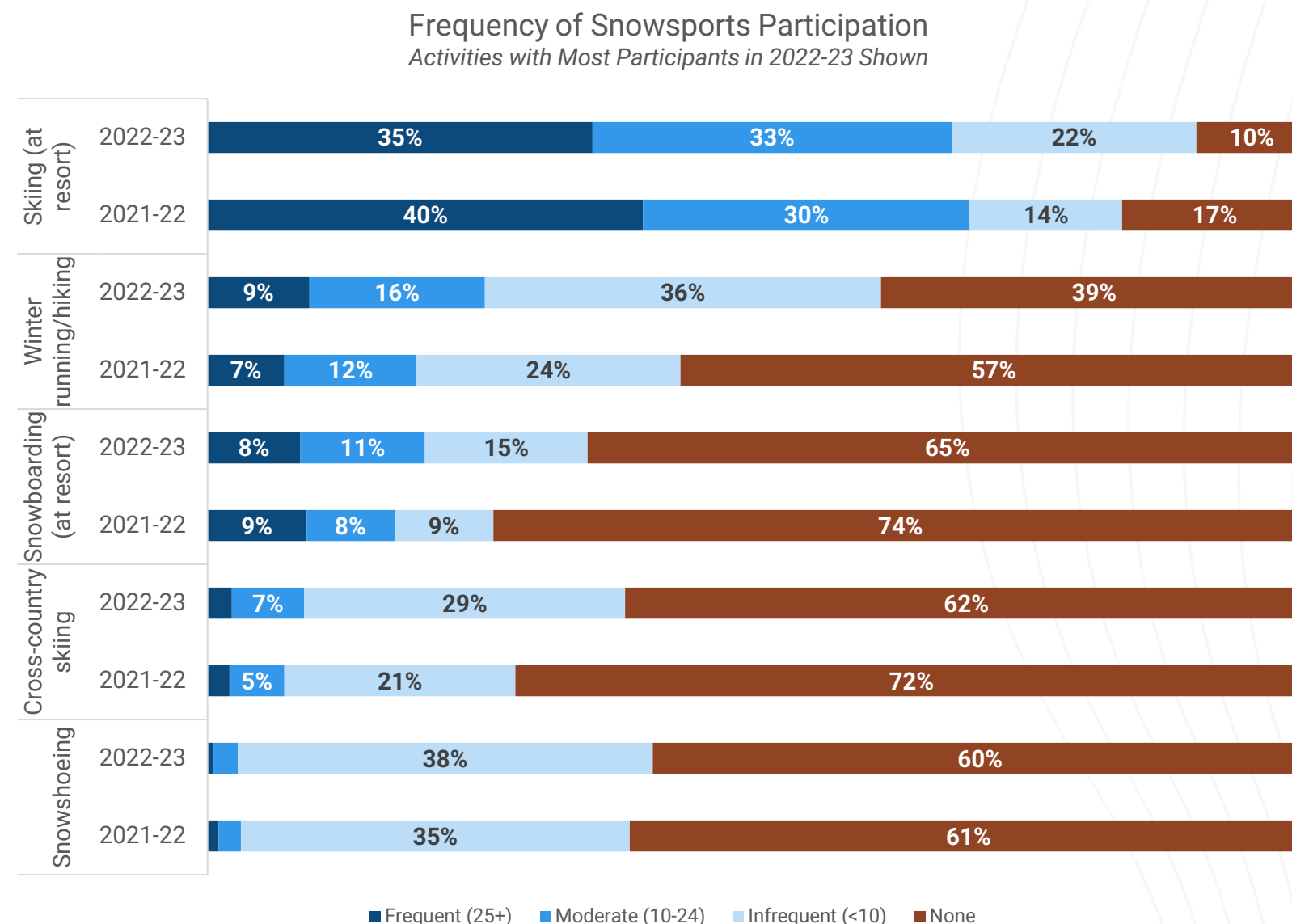
Participation in resort skiing remained steady from 2022 to 2023 in the West but decreased in the Northeast.

Average Days Resort Skiing over Last 12 Months by Region



While there were more skiing participants in 2022-23, Enthusiasts skied slightly more frequently in 2021-22.

- In the 2022-23 season, a greater share of Enthusiasts reported participating in resort skiing compared to the 2021-22 season. However, in the 2021-22 season, a greater share of skiers reported frequent (25+ days) skiing compared to 2022-23.
- Enthusiasts ages 65 or older were more likely to report frequent resort skiing (45%) than those under the age of 45 (26%).
- Those without kids in their home (37%) were more likely to ski frequently than those with kids (27%).
- Additionally, non-Hispanic white Enthusiasts were more likely to report frequent skiing (37%) than non-White Enthusiasts (21%).



Winter running/hiking, snowshoeing, and cross-country skiing were common additional activities among resort skiers.

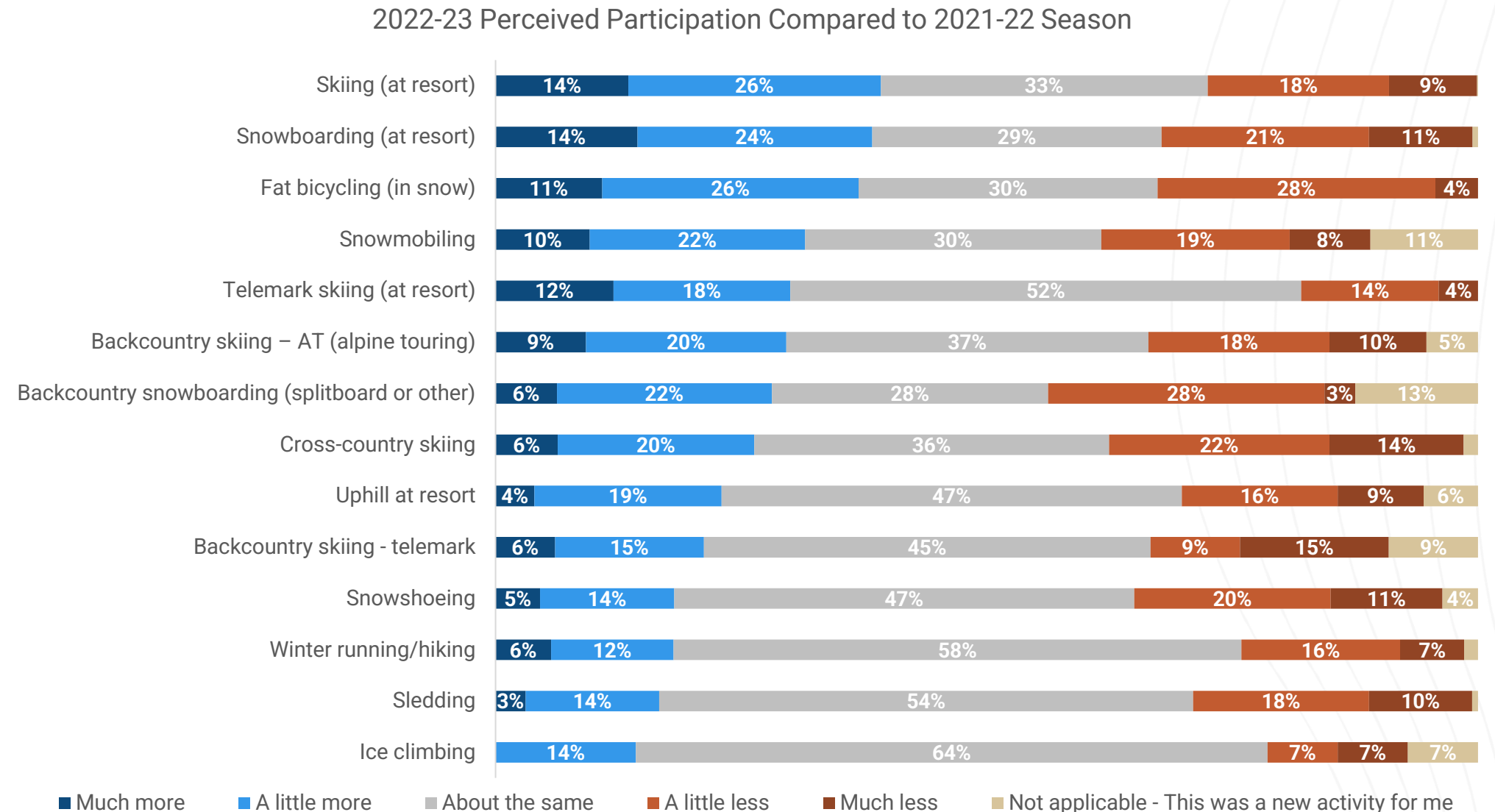
This table examines crossover activities. To interpret it correctly, the column shows the base activity while the rows show the additional activities they participated in. For instance, among those who went skiing at a resort, 61% also went winter running/hiking, 42% went snowshoeing, and 40% cross-country skiing.

Additional Participated Activities	Total	Participated in Activity													
		Skiing (at resort)	Snow-boarding (at resort)	Telemark skiing (at resort)	Backcountry skiing – AT (alpine touring)	Backcountry snow-boarding (splitboard or other)	Backcountry skiing - telemark	Snow-mobiling	Cross-country skiing	Uphill at resort	Snow-shoeing	Winter running/hiking	Sledding	Fat bicycling (in snow)	Ice climbing
Skiing (at resort)	90%	100%	51%	85%	98%	40%	91%	86%	89%	93%	89%	85%	81%	89%	91%
Snowboarding (at resort)	35%	17%	100%	33%	19%	86%	19%	43%	22%	28%	26%	29%	39%	48%	44%
Telemark skiing (at resort)	11%	11%	9%	100%	20%	22%	63%	20%	23%	19%	11%	12%	12%	19%	78%
Backcountry skiing – AT (alpine touring)	30%	36%	16%	49%	100%	22%	54%	37%	49%	70%	30%	31%	28%	37%	58%
Backcountry snowboarding (splitboard or other)	7%	3%	24%	17%	6%	100%	20%	20%	6%	11%	7%	8%	11%	8%	13%
Backcountry skiing - telemark	7%	8%	4%	50%	15%	17%	100%	13%	17%	18%	9%	8%	8%	12%	67%
Snowmobiling	15%	16%	20%	31%	21%	39%	29%	100%	19%	18%	18%	16%	23%	41%	44%
Cross-country skiing	38%	40%	23%	72%	60%	25%	75%	43%	100%	55%	54%	44%	38%	66%	73%
Uphill at resort	26%	29%	23%	48%	69%	36%	56%	31%	45%	100%	32%	30%	30%	52%	70%
Snowshoeing	40%	42%	31%	44%	41%	35%	48%	43%	60%	46%	100%	47%	56%	62%	50%
Winter running/hiking	61%	61%	56%	79%	69%	62%	78%	63%	74%	73%	76%	100%	71%	80%	90%
Sledding	32%	31%	42%	42%	35%	50%	38%	52%	41%	38%	50%	39%	100%	55%	25%
Fat bicycling (in snow)	10%	11%	13%	17%	15%	9%	14%	26%	20%	20%	16%	13%	15%	100%	33%
Ice climbing	3%	3%	4%	23%	8%	4%	27%	9%	8%	9%	4%	4%	2%	12%	100%

Darker shades indicate larger numbers in each row

About two fifths of respondents skied and/or snowboarded at a resort more this season.

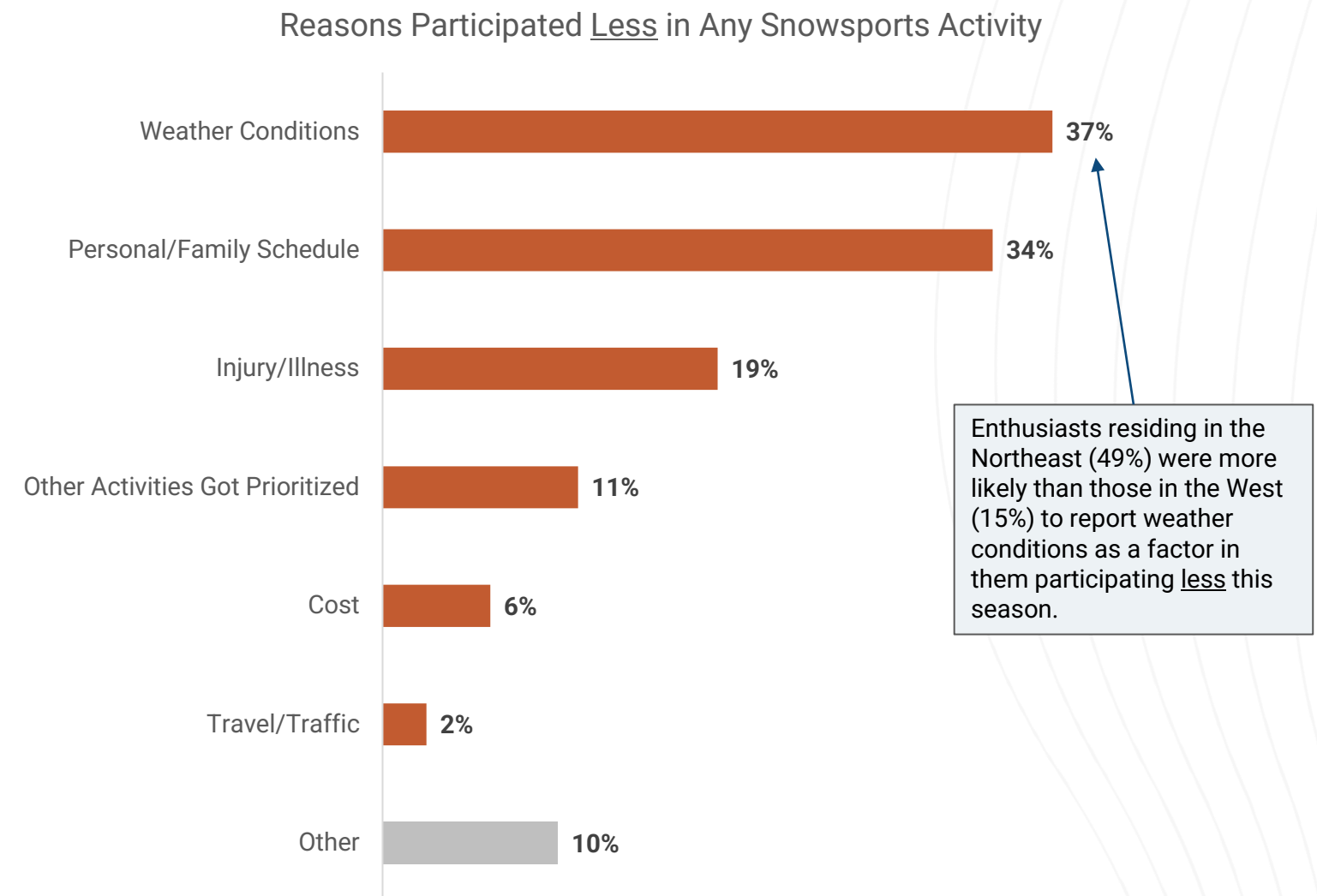
- When asked to compare participation to the previous season, two fifths of Enthusiasts who reported skiing at a resort this season (40%) reported skiing more than they did in the 2021-22 season.
- Of Enthusiasts who reported snowboarding at a resort, just under two fifths (38%) reported snowboarding more than they did last season.



Over one third of Enthusiasts reported weather conditions as a reason they participated less.

Enthusiasts who participated less in any snowsports activity this season were asked why they participated less. Their responses were coded, and verbatim responses can be found in the accompanying data tables.

- Over one third of Enthusiasts who participated less (37%) noted weather conditions as a factor in participating less this season compared to last.
- Personal/family schedule (34%) and injury or illness (19%) were also common reasons for participating less frequently this season.

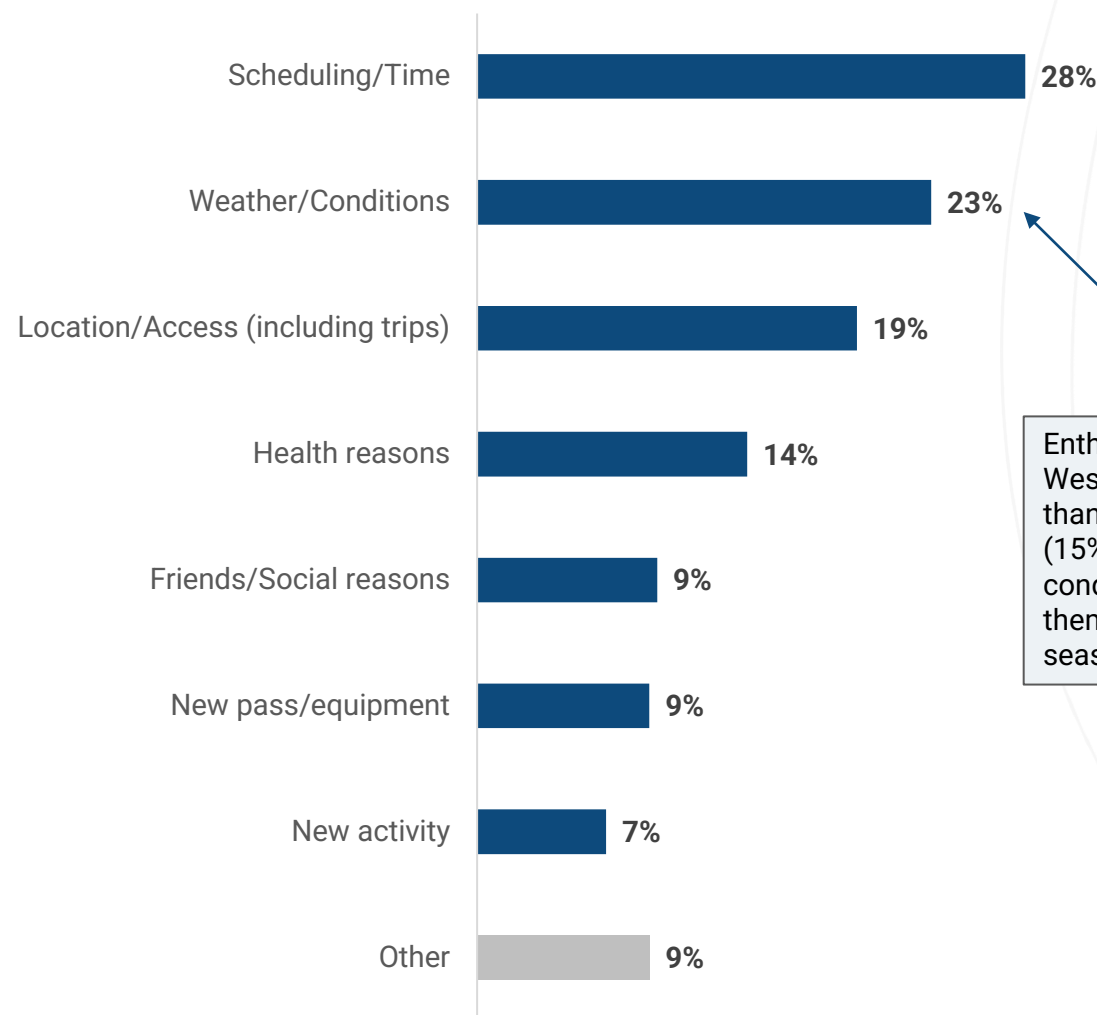


Over one quarter of Enthusiasts who participated more noted that they had more time to do so.

Enthusiasts who participated more in any snowsports activity this season were asked why they participated more. Their responses were coded, and verbatim responses can be found in the accompanying data tables.

- Over one quarter of Enthusiasts who participated more (28%) noted scheduling and time as a factor in their more frequent participation compared to last season.
- Other common reasons for participating more included weather conditions (23%), location and/or trips (19%), and health reasons (14%).

Reasons Participated More in Any Snowsports Activity

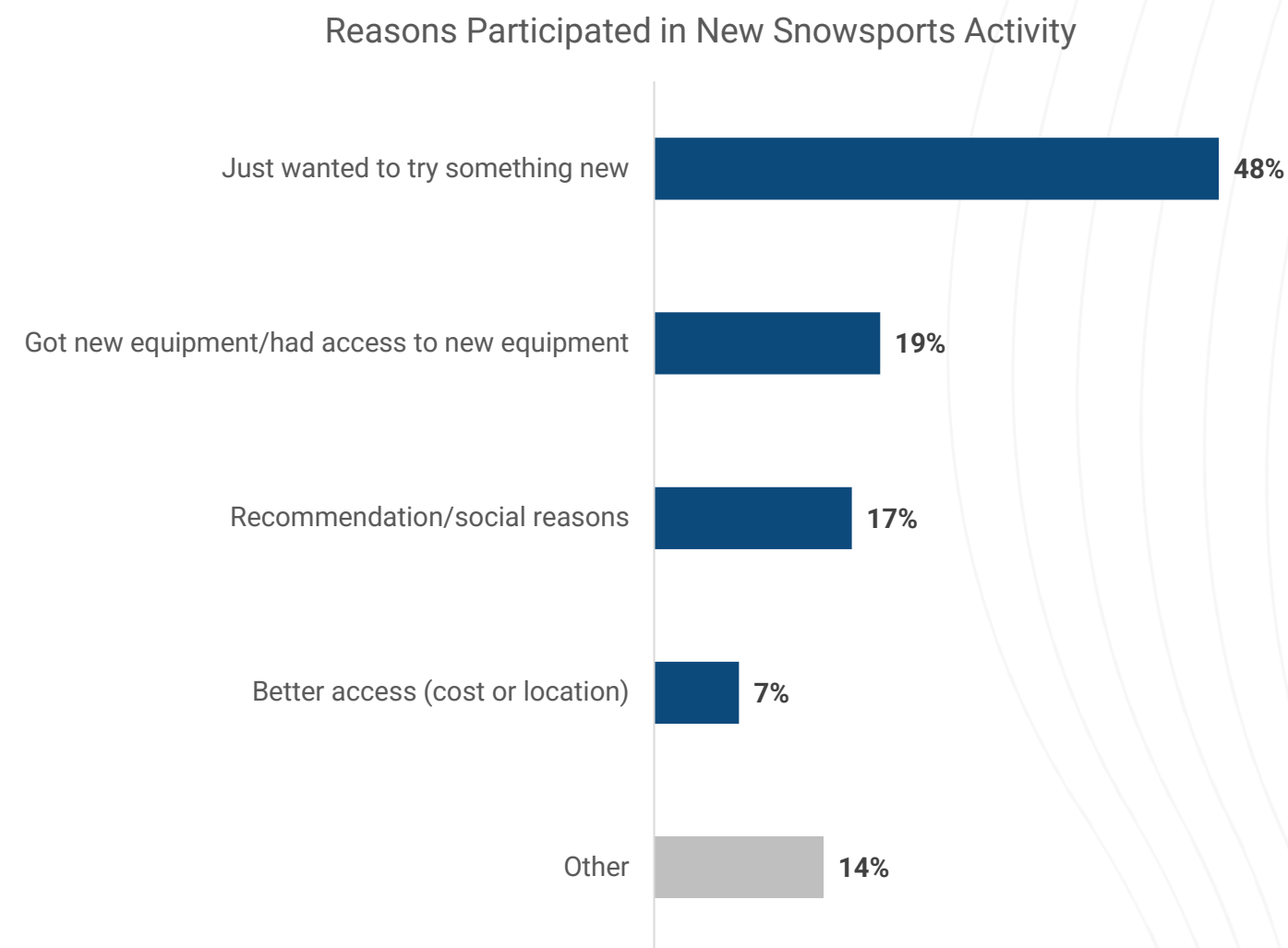


Enthusiasts residing in the West (34%) were more likely than those in the Northeast (15%) to report weather conditions as a factor in them participating more this season.

The most common reason for trying another snowsports activity this season was a desire to try something new.

Enthusiasts who participated in a new activity this season were asked why they started a new activity. Their responses were coded, and verbatim responses can be found in the accompanying data tables.

- Of Enthusiasts who reported participating in a new snowsport this season, just under half (48%) noted that they just wanted to try something new.
- Other common reasons for starting a new activity this season were having access to new equipment (19%) and it being recommended to them (17%).

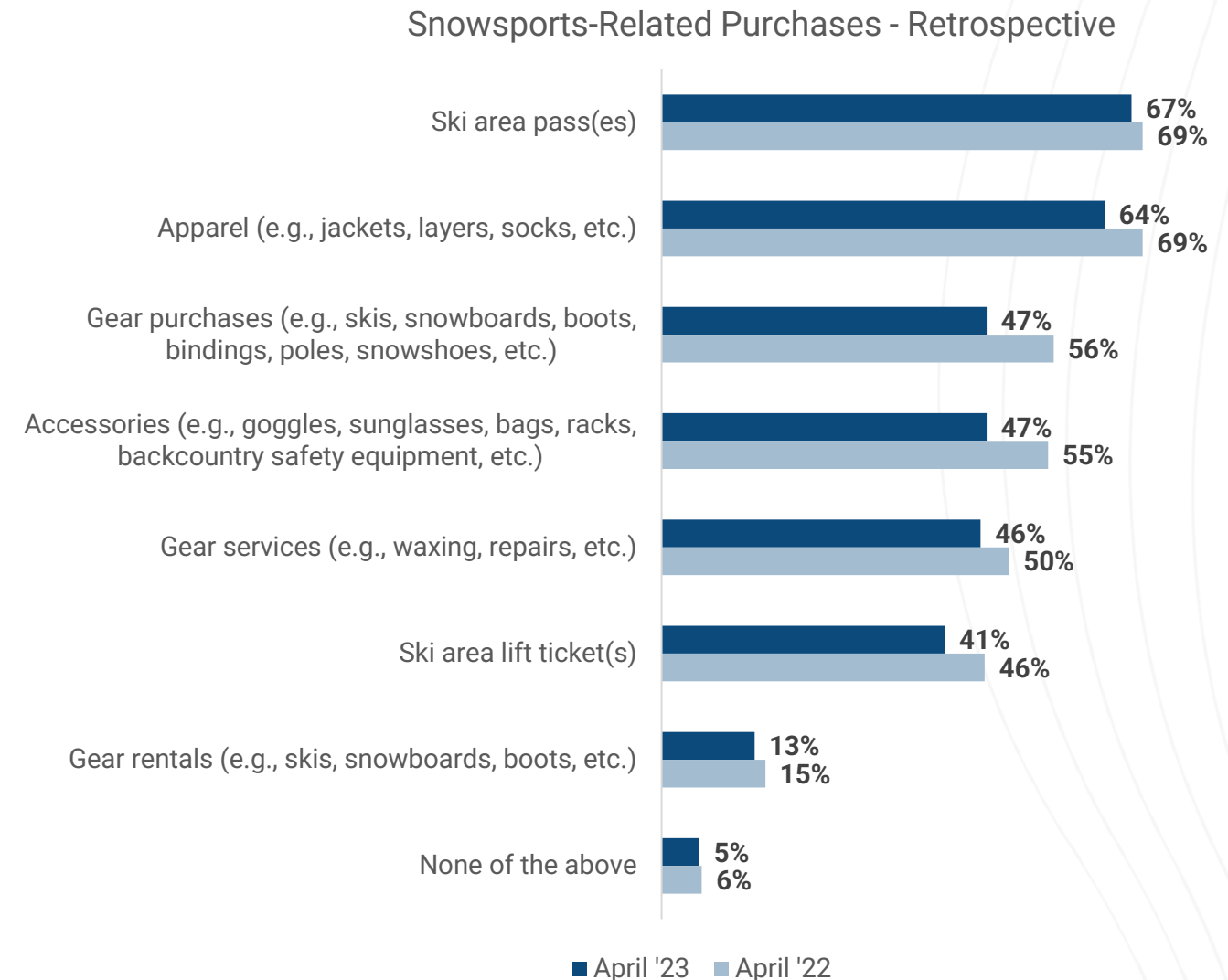


EXPENDITURES

Enthusiasts generally purchased at similar rates compared to the 2021-22 season.

In April 2022 and in April 2023, Enthusiasts were asked to retrospectively report any snowsports-related purchases they made during the current season.

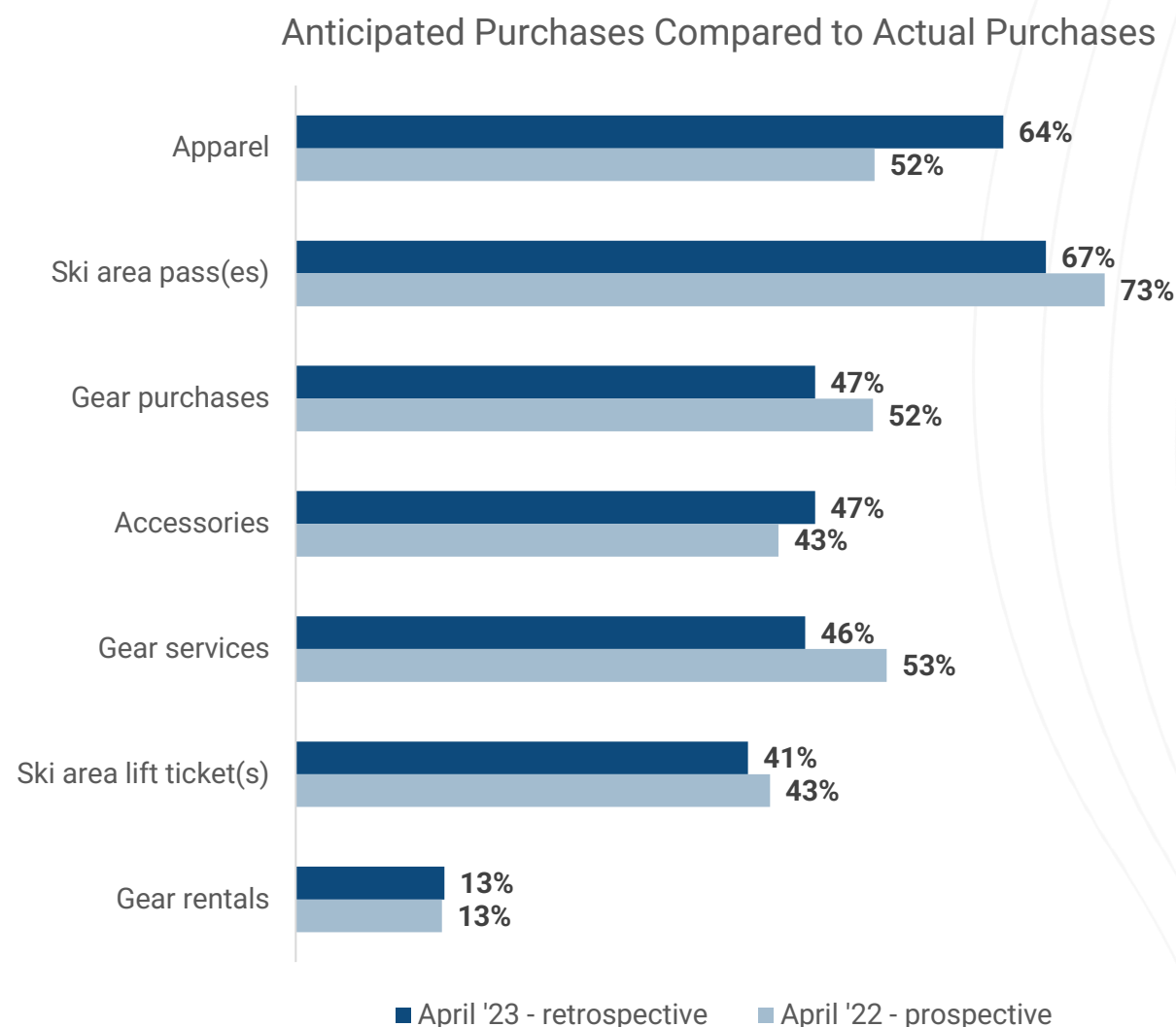
- In the 2022-23 season, the amount of purchases made by Enthusiasts remained relatively steady for most snowsports products.
- However, Enthusiasts purchased gear and accessories slightly less in the 2022-23 season compared to 2021-22.



Enthusiasts purchased more apparel in the 2022-23 season than they anticipated.

In April 2022, Enthusiasts were asked to prospectively report snowsports-related purchases they expected to make in the 2022-23 season. Results are compared to what Enthusiasts reported purchasing during the 2022-23 season in April 2023.

- Enthusiasts purchased more apparel in the 2022-23 season (64%) than they anticipated in April 2022 (52%).
- However fewer Enthusiasts purchased ski area passes, gear, and gear services than they expected to in April 2022.



Frequent skiers were more likely to purchase gear.

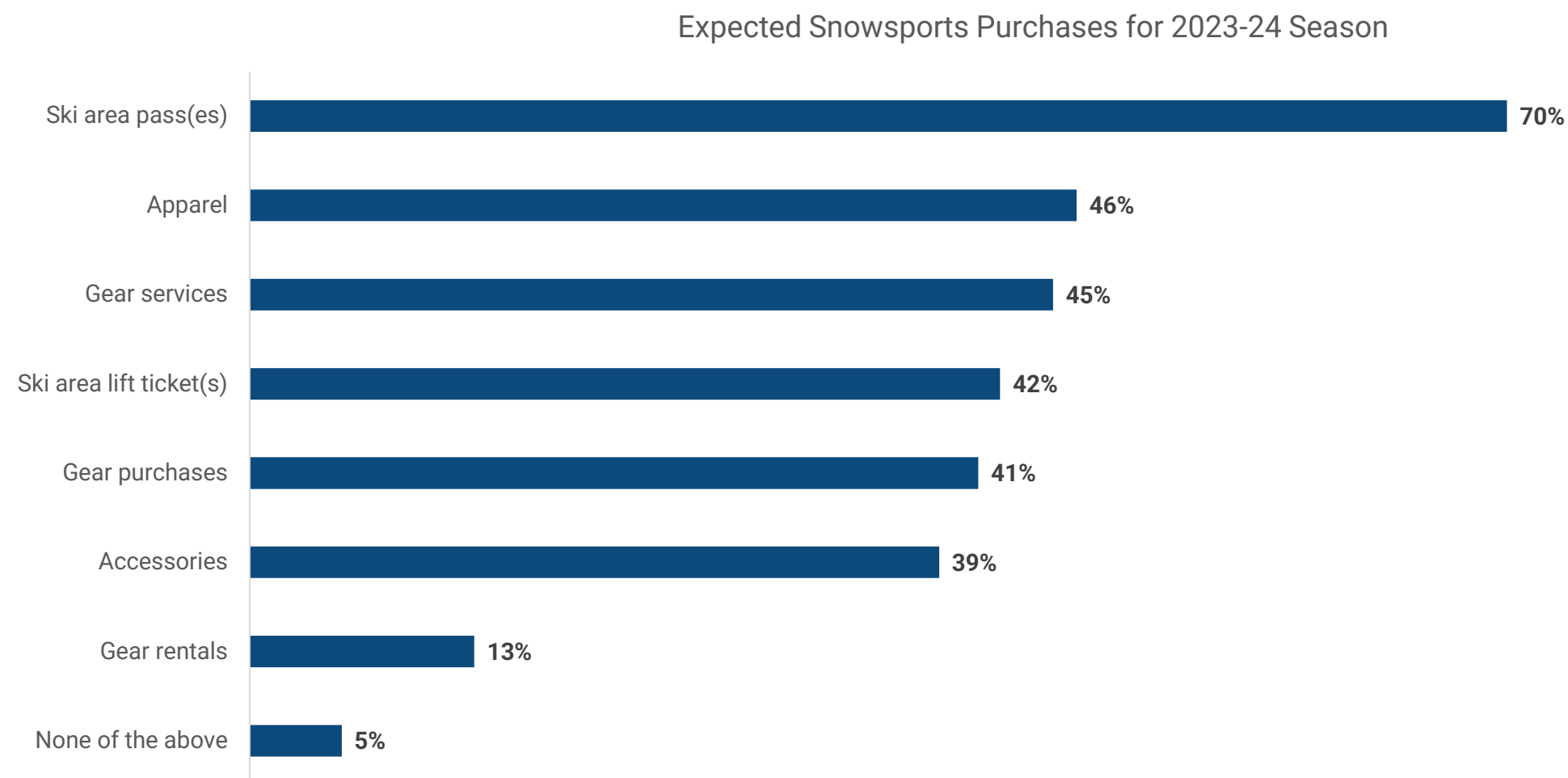
Types of Purchases This Season
(April 2023 only)

	Total	Age			Gender		Kids		Annual Household Income			Region			Resort Skiing Frequency		
		Under 45	45 - 64	65 and older	Male	Female	Yes	No	<\$100k	\$100,000 to \$149,999	\$150k+	West	Northeast	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Ski area pass(es)	67%	64%	67%	73%	69%	63%	59%	70%	59%	69%	73%	72%	71%	44%	54%	83%	79%
Apparel	64%	62%	69%	56%	64%	63%	69%	62%	56%	63%	71%	61%	65%	65%	57%	67%	68%
Gear purchases	47%	55%	46%	44%	50%	40%	54%	45%	42%	46%	53%	52%	46%	37%	29%	45%	63%
Accessories	47%	57%	50%	35%	47%	46%	56%	44%	44%	46%	51%	47%	48%	42%	45%	46%	53%
Gear services	46%	40%	48%	46%	48%	43%	46%	46%	41%	46%	49%	46%	49%	33%	29%	53%	63%
Ski area lift ticket(s)	41%	42%	42%	36%	41%	40%	44%	40%	39%	39%	43%	28%	49%	39%	55%	43%	38%
Gear rentals	13%	16%	14%	12%	14%	12%	17%	12%	9%	12%	19%	10%	14%	18%	22%	13%	11%
None of the above	5%	3%	5%	7%	4%	8%	5%	5%	8%	6%	3%	5%	3%	12%	4%	1%	1%

- Enthusiasts in the West and Northeast purchased ski area passes more than those in other areas of the US, as did those who skied 10 or more times in the past season.
- Enthusiasts who frequently ski (25+ days) generally purchased gear at a higher rate (63%) than those who skied 10-24 times (45%) or less than 10 times (29%).

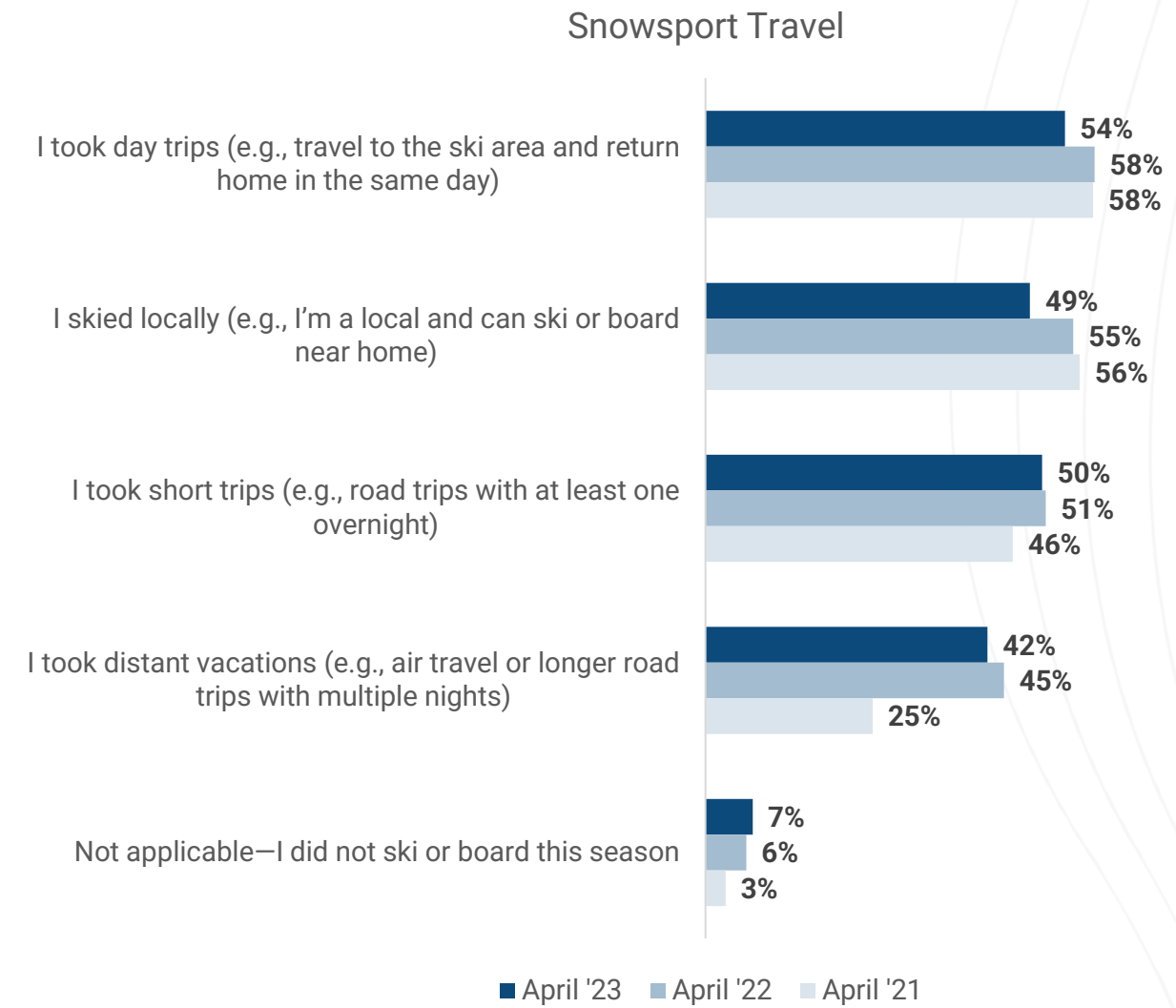
Darker shades indicate larger numbers in each row

For the 2023-24 season, over two thirds of Enthusiasts reported that they plan to purchase ski area passes.



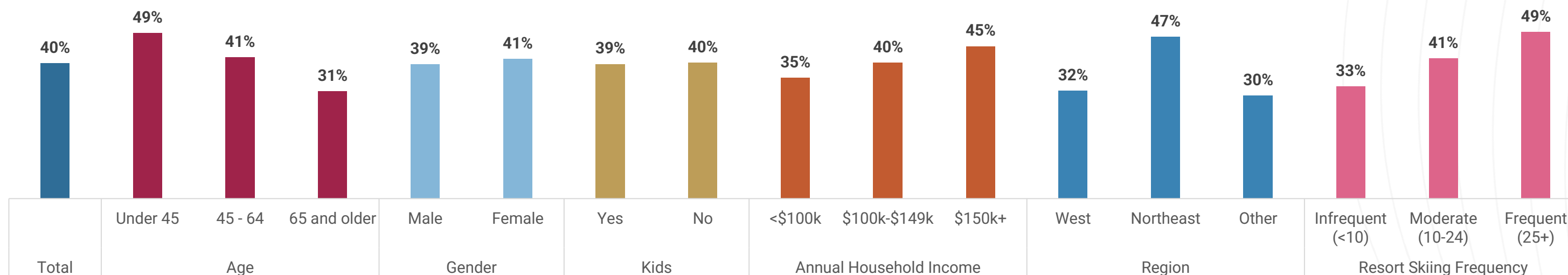
Enthusiasts generally traveled for snowsports participation in the 2022-23 season at similar rates to the previous season.

- While in the 2020-21 season only one quarter of Enthusiasts (25%) took distant vacations for snowsports participation, that rate increased to over two fifths of Enthusiasts (45%) in the 2021-22 season. In the 2022-23 season, this rate held steady at just over two fifths (42%), suggesting that the rate at which snowsports Enthusiasts take distant vacations may have returned to normal post-Covid.



Enthusiasts who are younger or live in the Northeast were more likely to have visited a new ski area for the first time this season.

Visited a New Ski Area for the First Time During 2022-23 Season



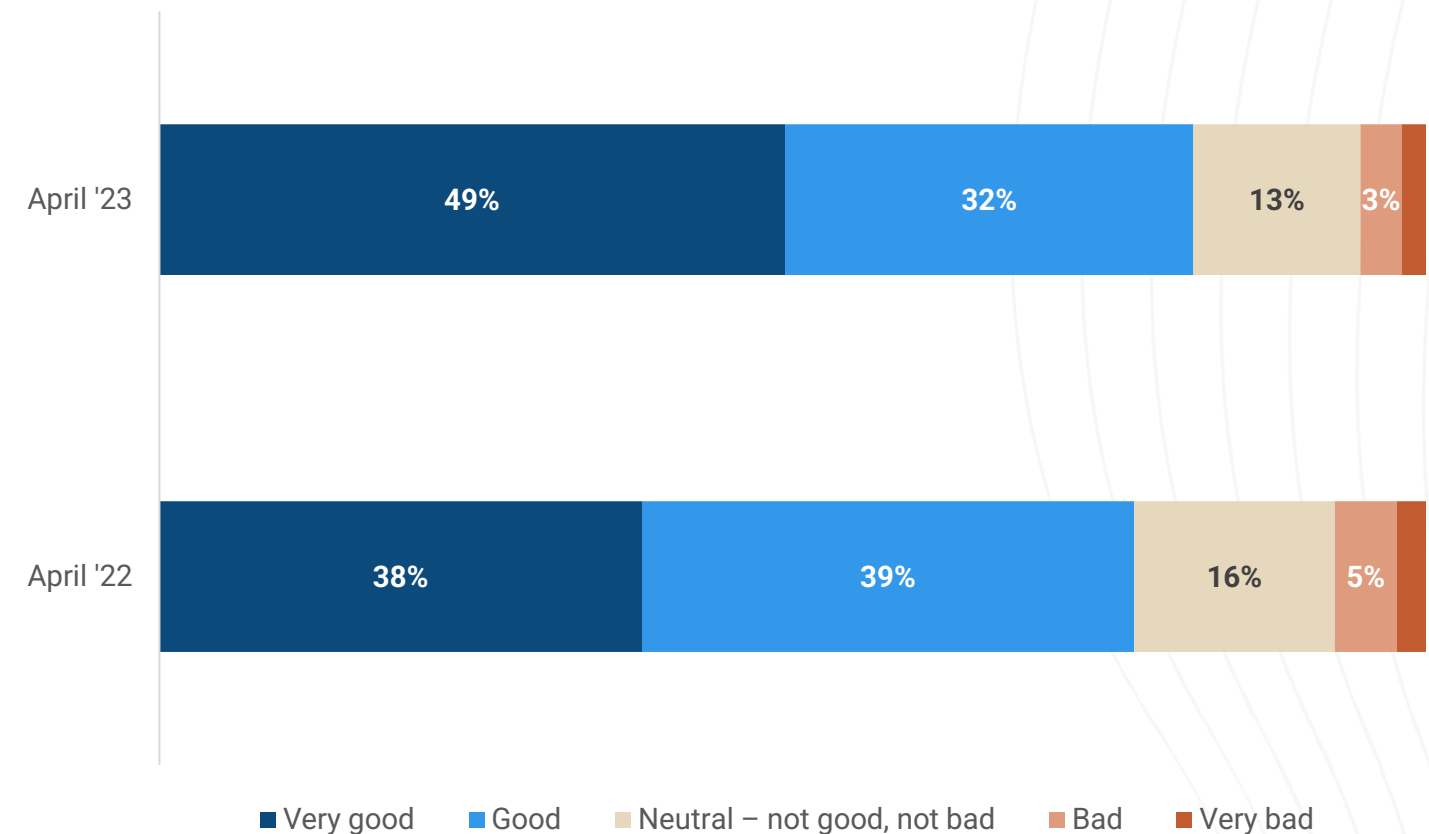
Overall, 40% of respondents said they visited a new ski area for the first time this season (2022-23), compared to 43% last season (2021-22). Those who live in the northeast or are younger were more likely to have visited a new ski area for the first time in the 2022-23 season.

LOOKING AHEAD

A majority of Enthusiasts rated their personal experience with snowsports this season as good or very good.

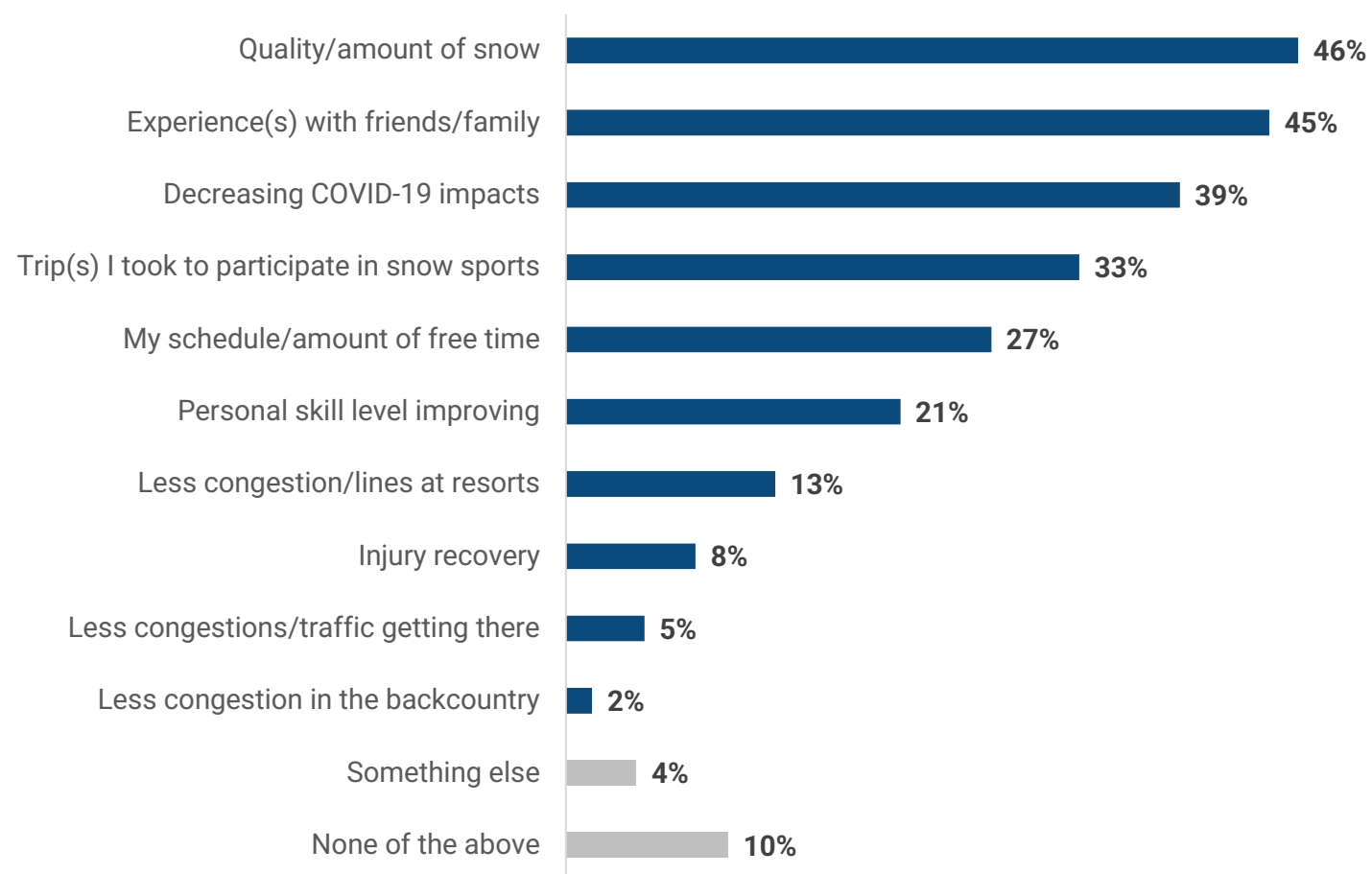
- A greater share of Enthusiasts rated their personal experience in the 2022-23 season as “very good” (49%) than they did for the 2021-22 season (38%).
- Enthusiasts residing in the West (59%) were more likely to rate their experience in the 2022-23 season as “very good” than those residing in the Northeast (46%). Those residing in other regions (Southeast, Midwest, etc.) were more likely to rate their experience in the 2022-23 season as neutral.

Personal Experience with Snowsports Participation in Past Season

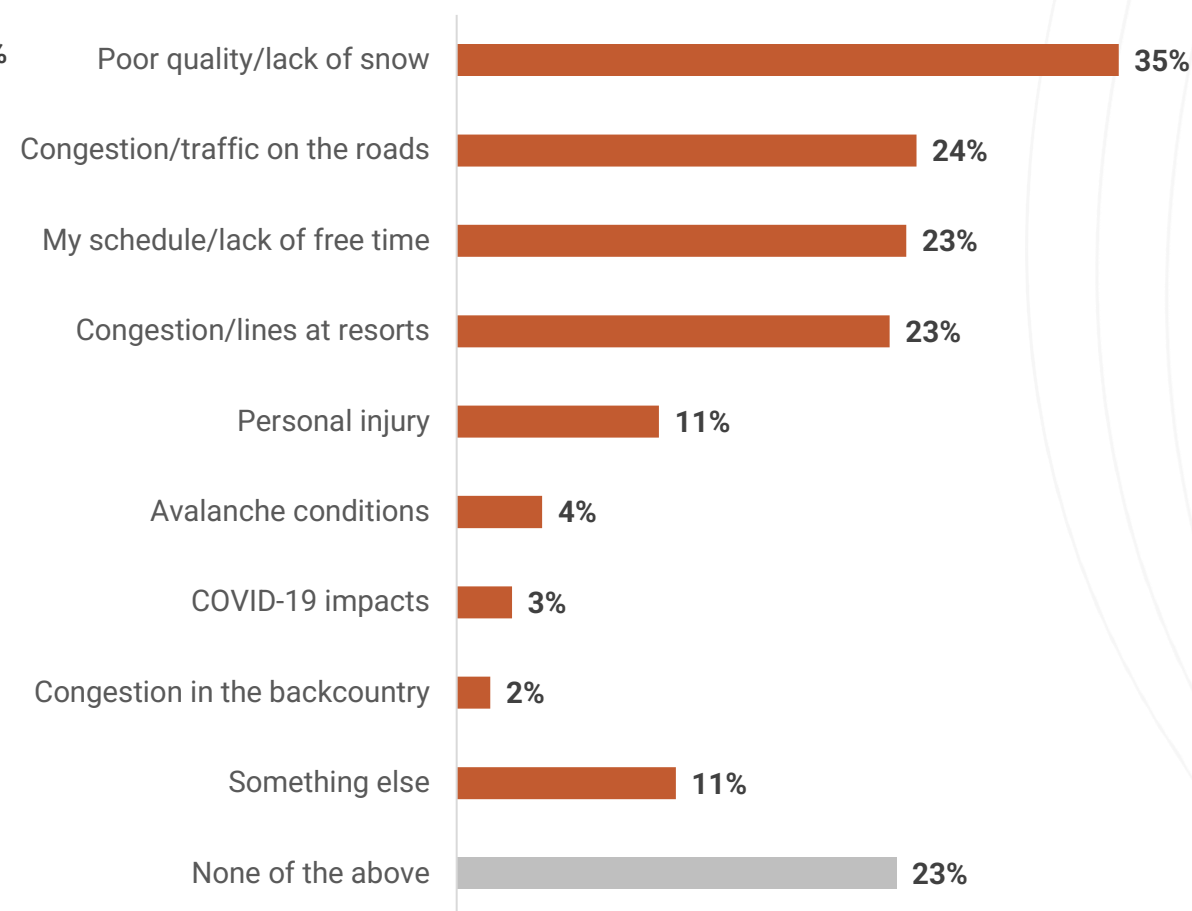


In the 2022-23 season, while Enthusiasts generally enjoyed the quality of snow, some felt the snow was of poor quality.

Reasons 2022-23 Season was Better Than Last Season

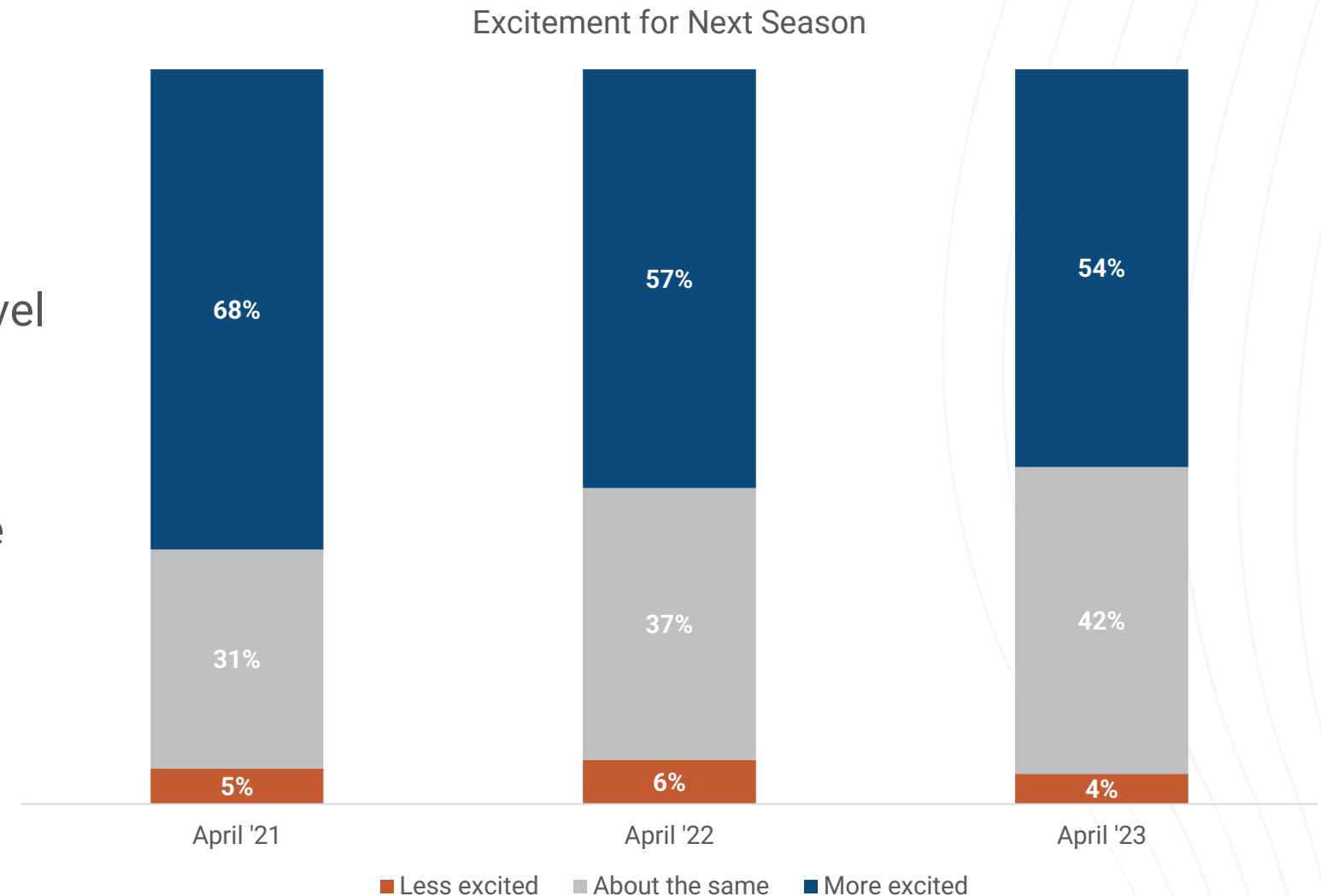


Reasons 2022-23 Season was Worse Than Last Season



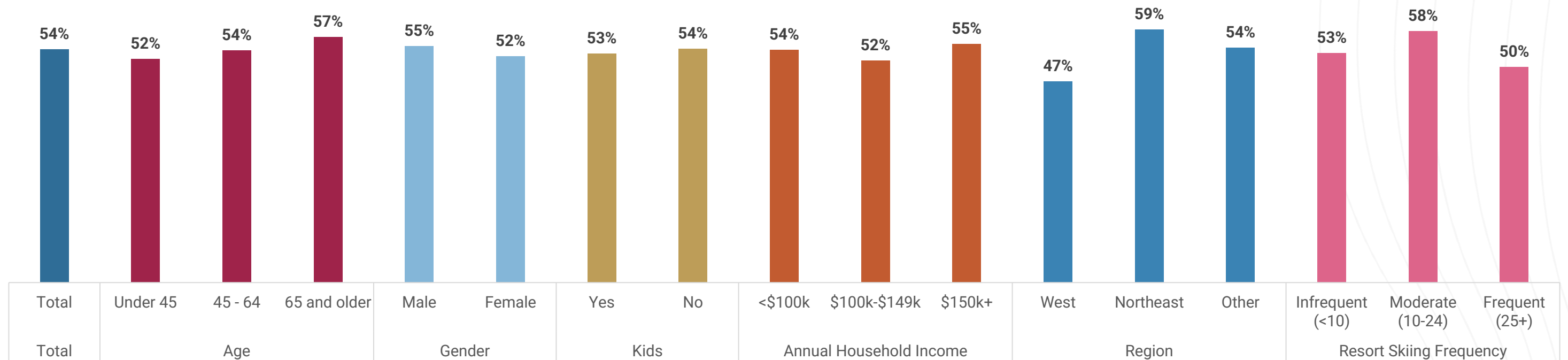
More than half of Enthusiasts reported being more excited for the 2023-24 season compared to this season.

- Excitement for the next winter season was highest in 2020-21, likely due to resorts and travel opening back up after Covid restrictions.
- Since then, excitement has slightly tapered off, but mostly held steady, for the past two years, with more than half of Enthusiasts feeling more excited for the next winter season.

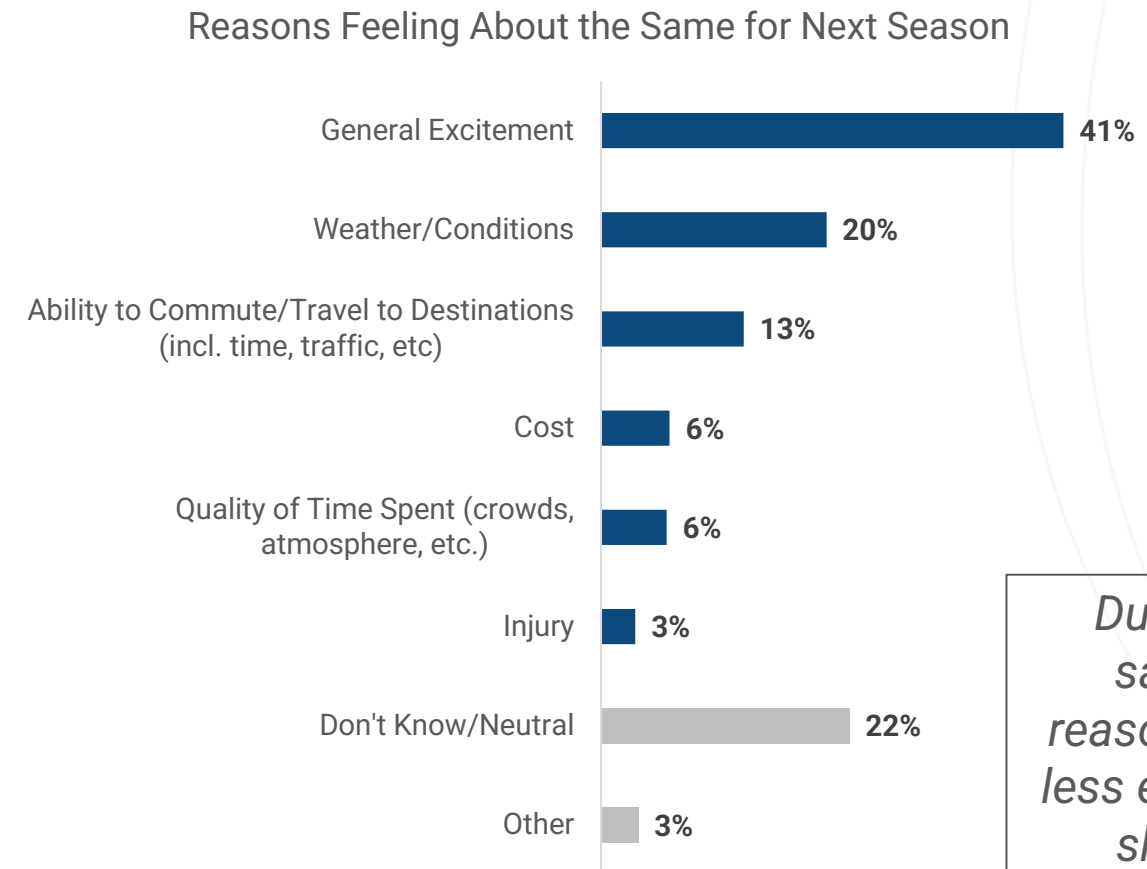
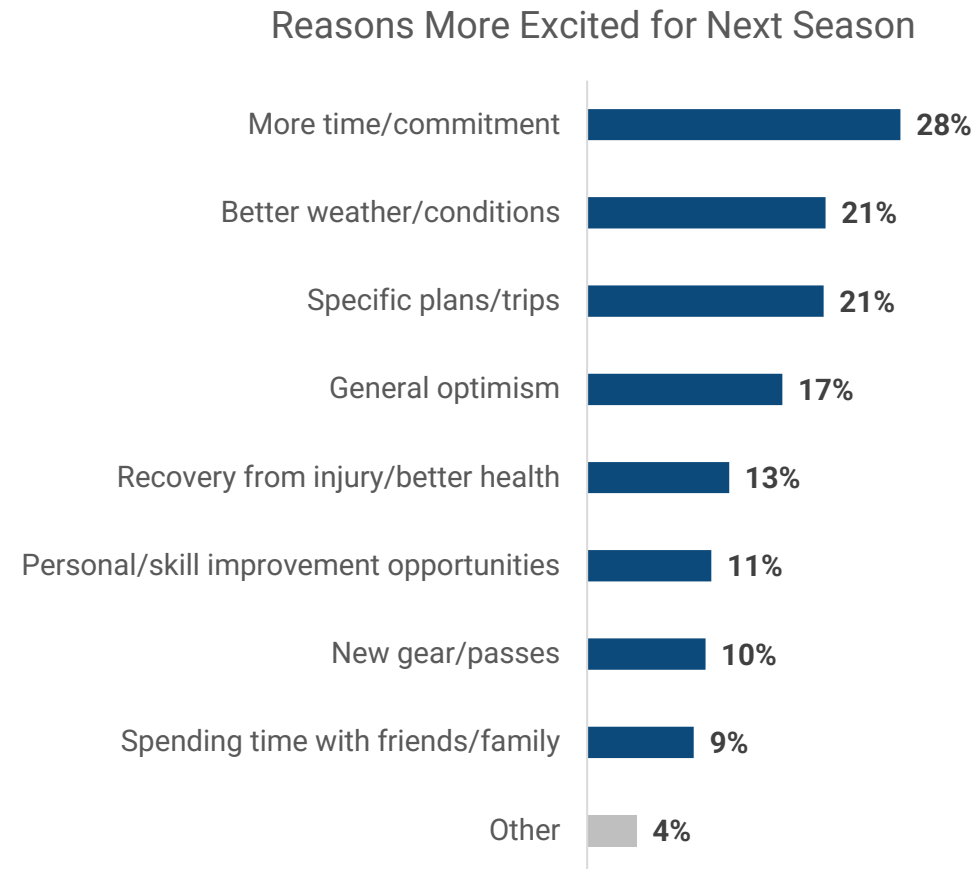


Groups generally reported similar levels of excitement for the 2023-24 winter season.

Excitement for Snowsports
(% a little or much more excited - April 2023 only)



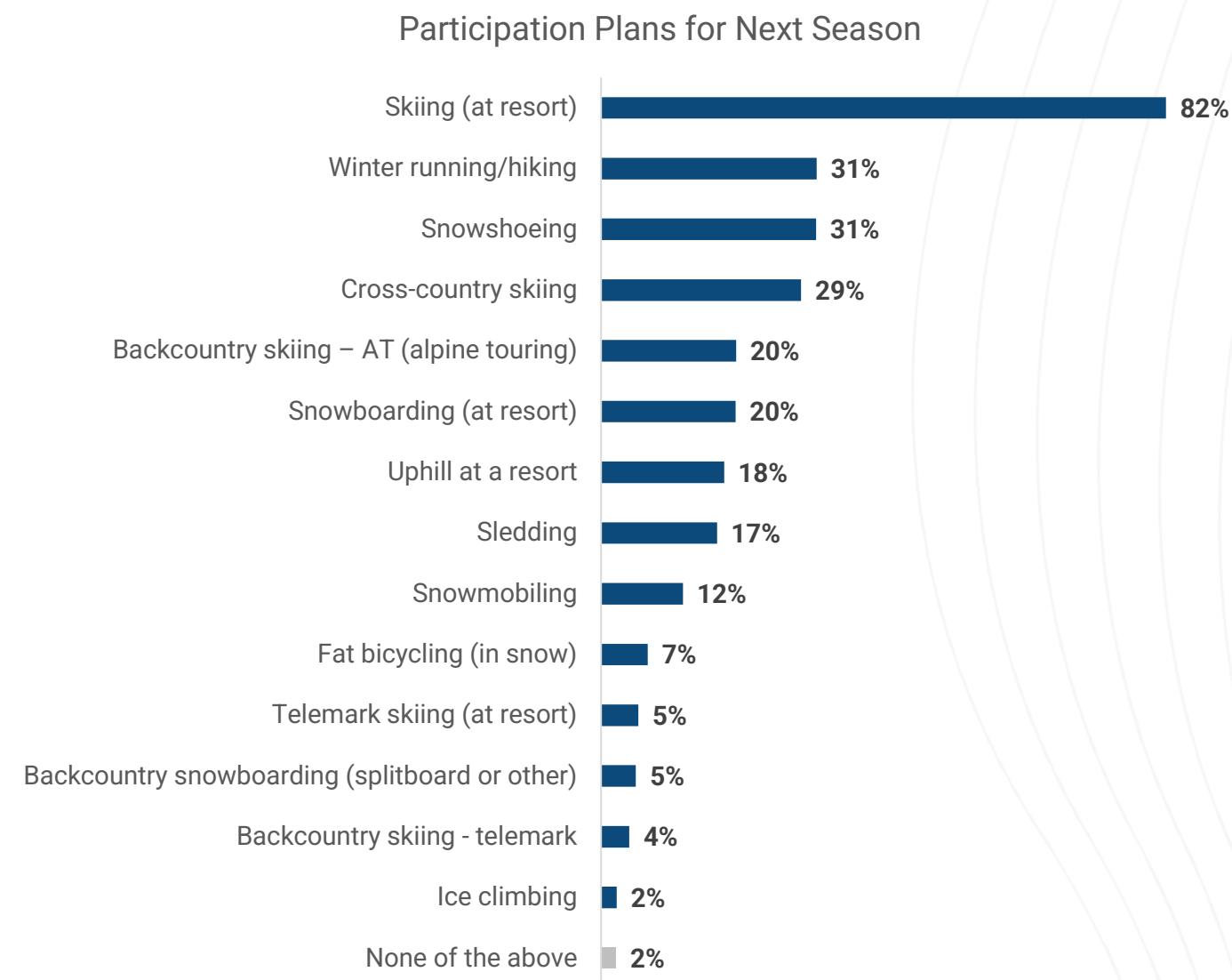
Respondents reported having more time for snowsports next season as a factor in being more excited, and always being excited as a factor in feeling about the same.



Due to a small sample size, reasons for feeling less excited are not shown here.

Most Enthusiasts plan to participate in snowsports next season, with most planning on skiing.

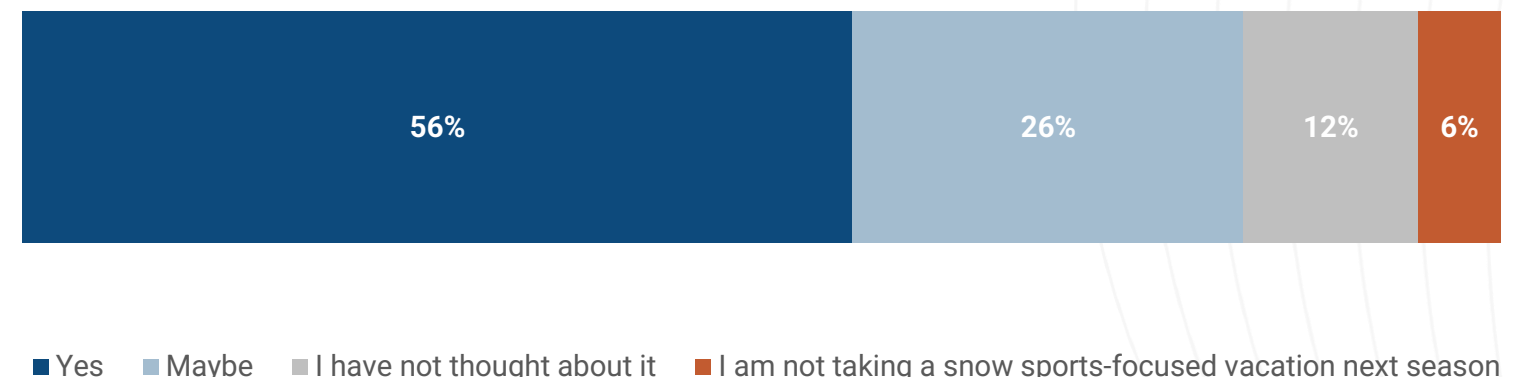
- A majority of Enthusiasts reported plans to participate in snowsports next season. Few (2%) said they plan to participate in none of the listed snowsports.
- Over four fifths of Enthusiasts (82%) plan to ski at resorts next season, and just under one third plan to participate in winter running or hiking.
- Other common snowsports that Enthusiasts plan to participate in next season include snowshoeing (31%) and cross-country skiing (29%).



More than half of Enthusiasts plan to take a snowsports-focused vacation next season.

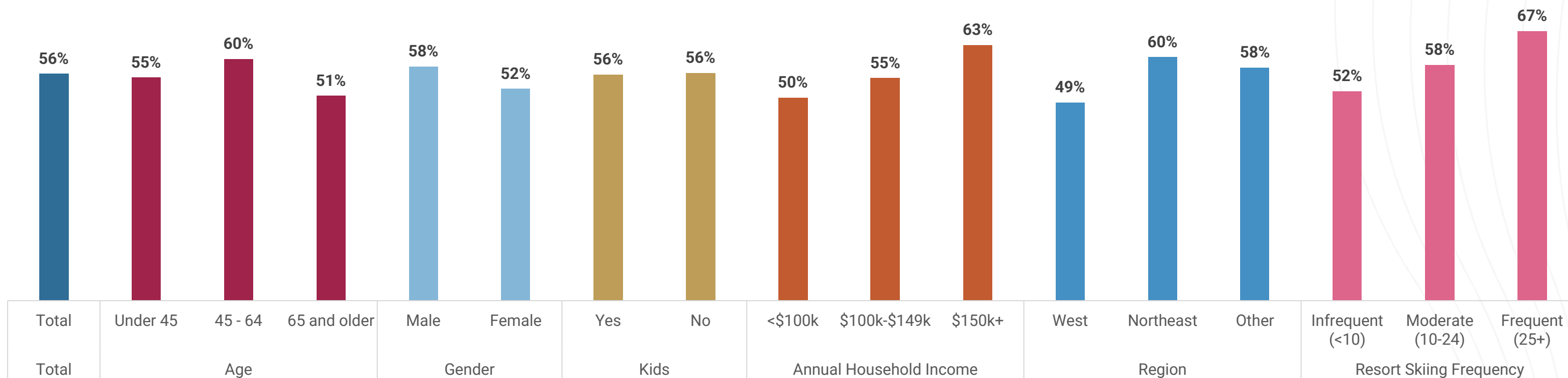
- Over half of Enthusiasts (56%) plan to take a snowsports-focused vacation in the 2023-24 season.
- Frequent resort skiing Enthusiasts (those who reported 25+ days of participation), those residing in the Northeast, and those with a household income of \$150k or more were more likely to report plans to take a snowsports-focused vacation next season. *Shown on the next page.*

Plans to Take a Snowsports-Focused Vacation Next Season



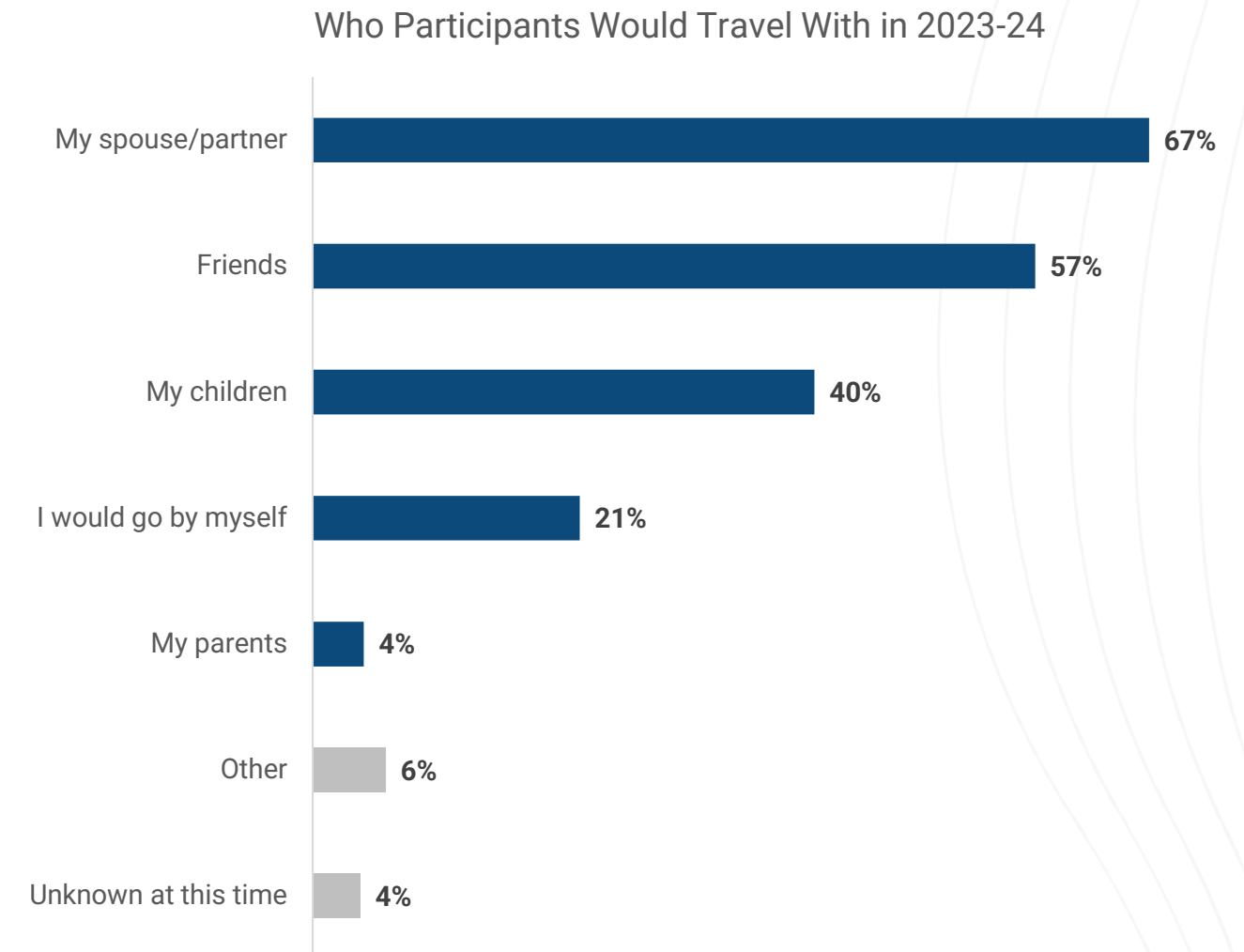
Frequent resort skiers, those living in the Northeast, and those with household incomes of \$150k or more were the most likely to report plans for a snowsports-focused vacation next season.

Planning to Take a Snowsports-Focused Vacation Next Season
(% yes - April 2023 only)



Of those planning to travel, two thirds would travel with their spouse or partner.

- Two thirds of Enthusiasts reported that if they take a snowsports-focused vacation next season, they would travel with their spouse or partner.
- Just under three fifths of Enthusiasts (57%) noted that they would travel with friends.
- One fifth (21%) reported that they would take the vacation alone.





APPENDIX

METHODOLOGY

MODE

- Online survey (desktop and mobile friendly)

SAMPLING

- Respondents were drawn from SIA's in-house panel. As noted earlier, these respondents came from attendees at events, including partner events, or otherwise have selected to receive communications from SIA.

DESIGN

- Corona Insights drafted this survey instrument based on the survey conducted in April 2021 and April 2022. Revisions were made to ensure questions were still relevant and useful in 2023.
- The survey was conducted in English.

INCENTIVE

- Participants were offered a chance to win one of five \$50 gift cards to REI (retailers are rotated between surveys throughout the season).

EXECUTION

- In total, 1,147 surveys were completed and included in this analysis; this included 23 partial surveys that were complete enough for inclusion.
- Surveys were conducted in April 2023 (April 10 - April 24).
- The median time it took to complete the survey was 9 minutes.

ADDITIONAL RESOURCES

Along with this report, several supplementary files are available for additional context and detail.

- **Survey instrument.** The full survey instrument used in this study has been provided for reference.
- **Analysis tables.** All results, both overall and by segment, are provided in a separate Excel file. This allows you to see results by question for different segments (see list at right). Additionally, all open-ended responses are provided verbatim in this file.
- **Segments examined:**
 - Age
 - Gender
 - Marital Status
 - Kids
 - Income
 - Region
 - Winter Activity Frequency
 - Specific Snowsport Participation

ABOUT SIA RESEARCH

In addition to this report, SIA publishes a wide variety of research products across consumer, retail, and winter participation.

- CONSUMER INSIGHTS
- INSIGHTS INTO DIVERSITY IN SNOWSPORTS
- NPD END OF SEASON RETAIL SALES REPORT
- WHOLESALE SALES AND ORDERS
- PARTICIPATION INSIGHTS REPORT
- CONSUMER PANEL
 - Year Over Year (YOY) surveys conducted across a nationwide group of consumers:
 - Consumer Anticipation (early season)
 - Snowsports Retail Consumer Behavior
 - Retail and Direct-to-Consumer for Snowsports
 - Holiday Purchases
 - Snowsports Used Marketplace
 - Snowsports Consumer Rental and Service
 - Snowsports Technology and Participation
 - Diversity in the Snowsports Industry
- CUSTOM RESEARCH
- For more information, please reach out to research@snowsports.org

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Corona Insights, a Denver-based research, evaluation, and consulting firm, designed the research (with input from SIA), managed the execution of the survey, performed all analyses, and provided this report.

Project Leads:

- David Kennedy, *Principal/CEO*
- Sam Keating, *Associate*



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