

A REPORT ON THE NEXT GENERATION OF WINTER PARTICIPANTS | 2021



sia

Snowsports
Industries
America

WELCOME

The SIA NextGen Study, 2021, is a detailed look at young and diverse non-participants in winter sports, who otherwise are physically active and live within a four-hour drive of an area where they could participate in winter activities. This group of people represents untapped potential to grow winter sports participation.

This study highlights perceptions, barriers, and needs of non-participants. We also surveyed current participants with an otherwise similar profile to understand how they started participating and why they continue to do so. Of particular interest in this study were non-White audiences that have also traditionally been underrepresented in winter sport participation, including Black, Hispanic, and Asian audiences.

This study is more important than ever. As the recent Census results have shown, America continues to become a more diverse nation, and this is most evident among younger generations.

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ABOUT THIS REPORT

ABOUT THIS RESEARCH

This report summarizes all research conducted on the next generation of snowsports participants during the latter half of 2021.

Research was comprised of two primary phases:

First, a series of in-depth interviews was conducted to help uncover attitudes, barriers, and other learnings to help inform the design of the survey instrument for phase 2.

Second, a large survey was conducted to help understand how prevalent those attitudes and barriers were in order to help us prioritize findings. Survey respondents primarily came through an online panel, though additional respondents came through several industry partners. SIA would like to thank these partners for their participation: Vail Vets, Mount Noire, and Adventure Tripr.

In both phases, respondents were screened for age, race/ethnicity, physical activity level, and proximity to a location where they could participate in snowsports.

Please see the [Appendix](#) for additional information on the methodology.

RESEARCH GOALS

What are the perceptions of winter snowsports among non-participants?

What barriers do non-participants face?

What are the unmet needs of non-participants that may need to be met in order to gain their participation?

THIS RESEARCH REPRESENTS FINDINGS FOR TWO GROUPS

Participants

While the focus of this research was on non-participants, we wanted to provide a comparison to participants to understand where actual differences may exist and therefore where focus may need to be placed to engage non-participants.

Participants were defined as having engaged in at least one of the following snowsports as an adult: Downhill skiing, snowboarding, cross country skiing, snowshoeing/winter hiking, sledding, backcountry skiing or snowboarding, fat tire winter biking, ice climbing, and/or uphill (ascending a ski hill at a resort without the use of a chairlift) .

Non-Participants

Non-participants had not engaged in any of the activities on the left and:

- Between 18 and 44 years old
- Exercise at least once a month
- Live in a state that has significant snowsport activity in Winter
- Have \$30,000 or more in household income

With the above criteria, this sample of non-participants is intended to reflect the untapped future market for snowsports in the US. **In addition to these criteria, the survey oversampled LGBTQ+, Black, and Hispanic, Latino, or Spanish origin non-participants.** When interpreting this report throughout, it is important to note that findings do not necessarily represent all of the country's non-participants, nor all non-participants of a certain race/ethnicity, but rather a sample of those who also meet the above criteria.

SURVEY RESPONDENT PROFILE

| | Non-Participant | Participant |
|------------------------|-----------------|-------------|
| RACE/ETHNICITY | | |
| African American/Black | 22% | 12% |
| Hispanic/Latinx | 20% | 18% |
| Asian | 15% | 9% |
| White | 57% | 75% |
| | | |
| LGBTQ+ | | |
| Yes | 17% | 15% |
| No | 83% | 85% |
| | | |
| AGE | | |
| 18-22 | 8% | 6% |
| 23-24 | 5% | 4% |
| 25-29 | 17% | 18% |
| 30-34 | 22% | 23% |
| 35-45 | 47% | 45% |

| | Non-Participant | Participant |
|---|-----------------|-------------|
| GENDER | | |
| Female | 61% | 55% |
| Male | 38% | 45% |
| Prefer to self-describe | 0% | 1% |
| | | |
| HOUSEHOLD INCOME | | |
| \$30k - \$49.9k | 30% | 19% |
| \$50k - \$99.9k | 43% | 42% |
| \$100k+ | 27% | 38% |
| | | |
| DISTANCE TO PARTICIPATE | | |
| No travel needed | 29% | 27% |
| Short distance (up to 2 hours driving, one-way) | 41% | 41% |
| Moderate distance (2-4 hours driving, one-way) | 28% | 25% |
| Longer | 2% | 7% |

Profiles of respondents are provided on this page and the next. Respondents are summarized in key demographic terms and can help in interpreting the results herein.

INTERVIEWEE PROFILE

| | Non-Participant | Participant |
|------------------------|-----------------|-------------|
| RACE/ETHNICITY | | |
| African American/Black | 5 | 6 |
| Hispanic/Latinx | 6 | 8 |
| Asian | 7 | 5 |
| White | 2 | 2 |
| | | |
| LGBTQ+ | | |
| Yes | 7 | 6 |
| No | 13 | 14 |
| | | |
| AGE | | |
| 18-22 | 6 | 3 |
| 23-24 | 8 | 5 |
| 25-29 | 4 | 7 |
| 30-34 | 2 | 4 |

| | Non-Participant | Participant |
|---|-----------------|-------------|
| GENDER | | |
| Female | 13 | 12 |
| Male | 7 | 7 |
| Prefer to self-describe | | 1 |
| | | |
| HOUSEHOLD INCOME | | |
| \$30k - \$49.9k | 5 | 2 |
| \$50k - \$99.9k | 9 | 12 |
| \$100k+ | 6 | 6 |
| | | |
| DISTANCE TO PARTICIPATE | | |
| No travel needed | 1 | 4 |
| Short distance (up to 2 hours driving, one-way) | 11 | 14 |
| Moderate distance (2-4 hours driving, one-way) | 8 | 2 |

ABOUT THE REPORT EXHIBITS

This research generated a significant amount of data that can be analyzed and segmented in many ways. To ease readability and interpretation of this report we have simplified the presentation of results by:

- Most exhibits show only participant vs. non-participant segments. Results by subsegments of these two primary segments were largely consistent in their overall theme (e.g., barriers were similar by race/ethnicity). Displaying all segments therefore created visual noise that distracted from the key findings.
 - Where differences do exist, they are noted in the narrative next to the exhibit.
 - In select cases, additional segments are shown to highlight those differences.
- Throughout the report, **light blue** represents **participants** and **dark blue** represents **non-participants**. Additional colors are used to present other segments.

A supplemental Excel file was also created with results by all segments. Please contact SIA research for more information: research@snowsports.org.



KEY TAKEAWAYS

Key Findings Dashboard

| | Participants | | | | Non-Participants | | | |
|---|-------------------|--------------------|---------------------|---------------------|-------------------|--------------------|--------------------|------------------|
| | LGBTQ+ | Black | Hispanic/Latino | White Alone | LGBTQ+ | Black | Hispanic/Latino | White Alone |
| Primary Barrier to Participation (Beyond Cost) | Don't Have Time | Live Too Far Away | No One to Go With | Don't Have Time | Fear of Injury | Fear of Injury | Fear of Injury | Fear of Injury |
| Top Motivation for Free Time Activities | To Play/Have Fun | To Play/Have Fun | To Play/Have Fun | To Play/Have Fun | To Play/Have Fun | To Play/Have Fun | To Relax Your Mind | To Play/Have Fun |
| Top Snowsport to Try This Winter | | | | | Snow-boarding | Sledding | Snow-boarding | Sledding |
| Top Thing it Would Take to Participate in Snowsports | | | | | Someone/Free Time | Someone to go With | Someone to go With | More Free Time |
| Percentage Agreeing Snowsports are Inclusive | 68% | 56% | 60% | 61% | 55% | 53% | 53% | 50% |
| Top Reason for Continued Participation | Physical Activity | Adventurous Sports | Enjoy Being Outside | Enjoy Being Outside | | | | |
| Percentage Knowing Someone Who Participates in Snowsports | 92% | 81% | 87% | 89% | 63% | 41% | 48% | 63% |

01

Almost one out of five non-participants said they had simply never thought about snowsports. Awareness, or more accurately, consideration is an initial barrier to converting non-participants into participants.

02

About half of non-participants agreed that snowsports were inclusive and/or for someone like them. About one in five disagreed. Most of the remaining non-participants neither agreed nor disagreed with these statements.

Snowsport participants agreed that participating in snowsports was inclusive and for someone like them at higher rates than non-participants. This was consistent for non-participants across race/ethnicity.

Female respondents and those with lower household incomes were less likely to agree that snowsports was inclusive and for someone like them.

LGBTQ+ respondents were more likely to agree than others that participating in snowsports was inclusive.

03

To play/have fun was a top reason for participating in leisure activities among all groups, regardless of demographics. However:

Snowsports participants seek physical activity in their free time. Participants were more likely than non-participants to say they were looking for physical activity in their free time.

Alternatively, non-participants were more likely to say they participated in free time activities to relax their mind. Promoting the relaxing elements of snowsports participation will be important to a large segment of non-participants.

04

Snowsports participants are perceived as physically fit and high income. When asked to choose between a series of pairs of descriptors, participants and non-participants held similar perceptions. Both agreed that snowsports participants were likely to be physically fit and higher income. These perceptions were largely consistent across demographic groups and may be in part due to the strong association skiing has in people's minds with snowsports, as opposed to other sports with lower barriers to entry.

Promoting lower-cost activities, such as snowshoeing, sledding, or even skiing and snowboarding at lower-cost ski areas, could help counter these cost perceptions. Promoting the diversity of terrain and ability to adapt participation to individual needs could help counter the perception that one needs to be in great shape to participate.

05

The most common introduction to snowsports was through family or friends. More than seven out of ten participants said they originally started participating in snowsports through their family/growing up doing so (40%) or through friends inviting them along (31%). White participants were more likely to say they grew up doing snowsports than People of Color.

However, about half of non-participants said they know someone who participates in snowsports. Not having other snowsports participants in one's social network is likely a key barrier to getting into snowsports. Relatedly, only about one out of four non-participants (26%) said they would participate in snowsports by themselves.

06

The most common barriers to snowsports participation that were explicitly noted by non-participants, as well as participants, were **cost, injury concerns, and a lack of skills or knowledge**. Nearly half of participants (48%) and 40% of non-participants said high cost was a reason for not participating in snowsports as much as they desired. Fear of injury was noted by about a third of each segment (this was even more common among females, 37%, than males, 26%). A lack of skills or knowledge was noted by 28% of non-participants.

07

Non-participants were most interested in trying sledding or snowboarding. When asked to identify a snowsport that they might participate in during the coming winter nearly a third of non-participants said sledding (32%) or snowboarding (28%). There was a significant drop to the third most common selection of downhill skiing (14%) and fourth most common, snowshoeing/ winter hiking (8%). Snowshoeing/winter hiking was also of interest to interviewees. The more accessible activities (e.g., sledding, hiking) may be good gateway activities to get non-participants to experience snowsports.

08

Access to tools and education will also help facilitate participation. Educational resources, from the very basic (e.g., what to wear, where to go, how to get equipment, etc.) to the more technical (e.g., how to ski), are essential to attracting non-participants. Related to key takeaway 5, having resources to help find others to participate with was frequently mentioned by interviewees.

09

Non-participants and participants alike want to see greater diversity represented in snowsports. Both participants and non-participants not only want to see more media that will inspire them to try snowsports, but also want to see broader representation in snowsports. From advertisements to social media content, all want to see diverse snowsport participants and athletes.

10

Most participants said enjoyment of the outdoors and/or physical activity kept them participating in snowsports. These were the top two reasons participants mentioned that kept them participating in snowsports. Participants were more likely to associate snowsports with the outdoors/nature than non-participants.



SNOWSPORT PARTICIPATION

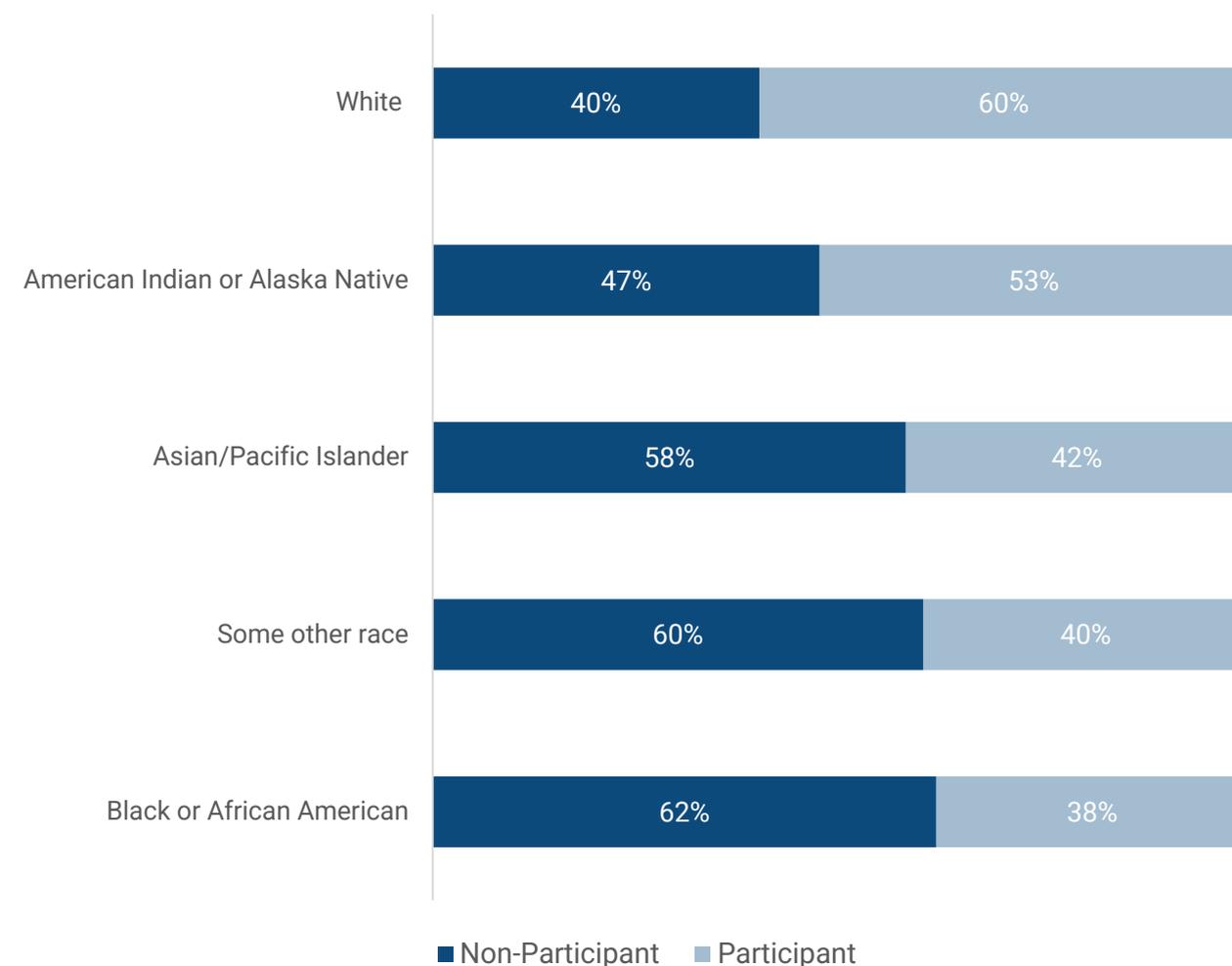


Skiing is really good exercise; we'll go to the mountain and get a workout in because it's just much more fun... it's great because it's very seasonal. You have a short period to do this, get out as much as you can and enjoy it a lot.

- Asian participant

Snowsports participants are disproportionately high income, male, and white

Participation by Race/Ethnicity

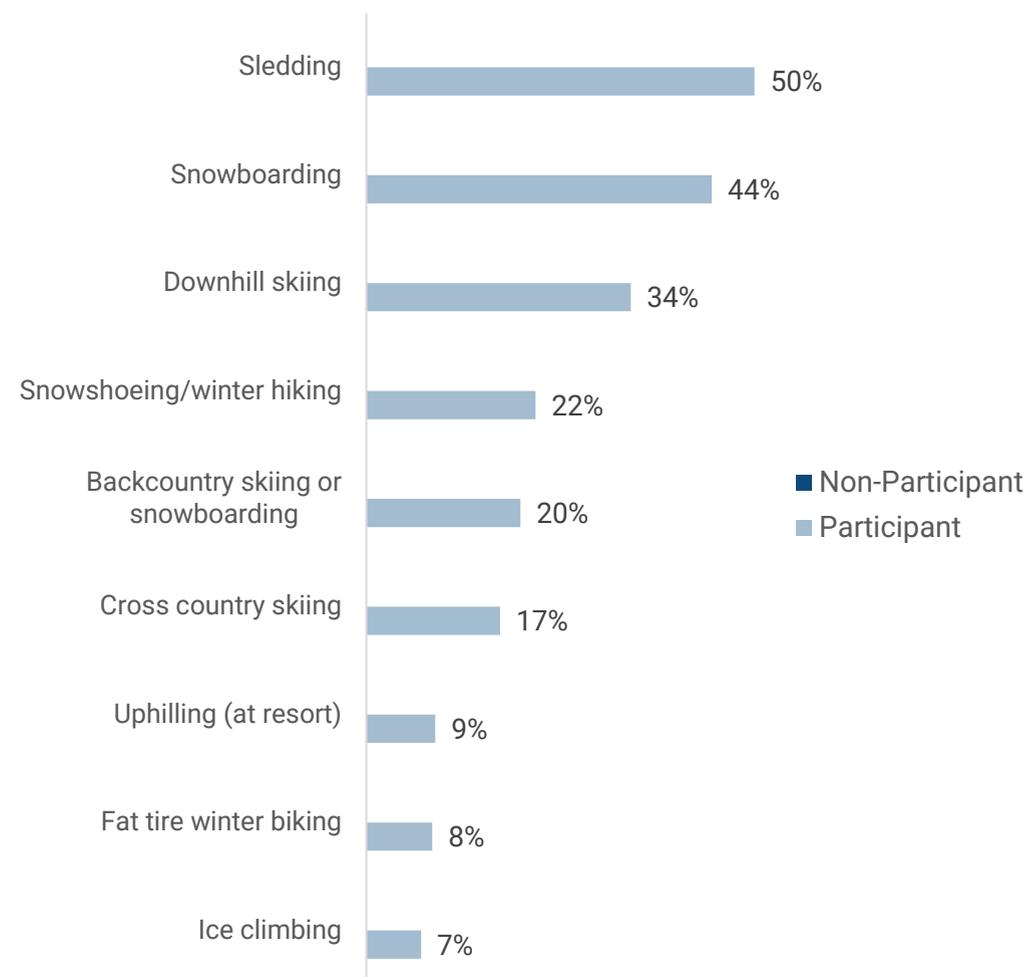


The graph on the left presents the breakdown of participants vs non-participants by race/ethnicity within the survey data. It is important to note that these data do not represent the US, but rather are a convenience sample of those who:

- Were physically active
 - 45 years old or younger
 - Live within 4 hours driving distance of snowsports in a typical winter
 - Have over \$30,000 of annual household income.
- Snowsports participants meeting these criteria were more likely to identify as White.
 - Additionally, males were more likely to be participants (56%) than females (50%).
 - Finally, snowsports participation increased with household income. 41% of those with annual household incomes of \$30,000 - \$49,000 were participants compared to 61% of those with incomes above \$100,000.

Sledding and snowboarding were the most popular snowsports

Snowsport Activities Participated in as an Adult



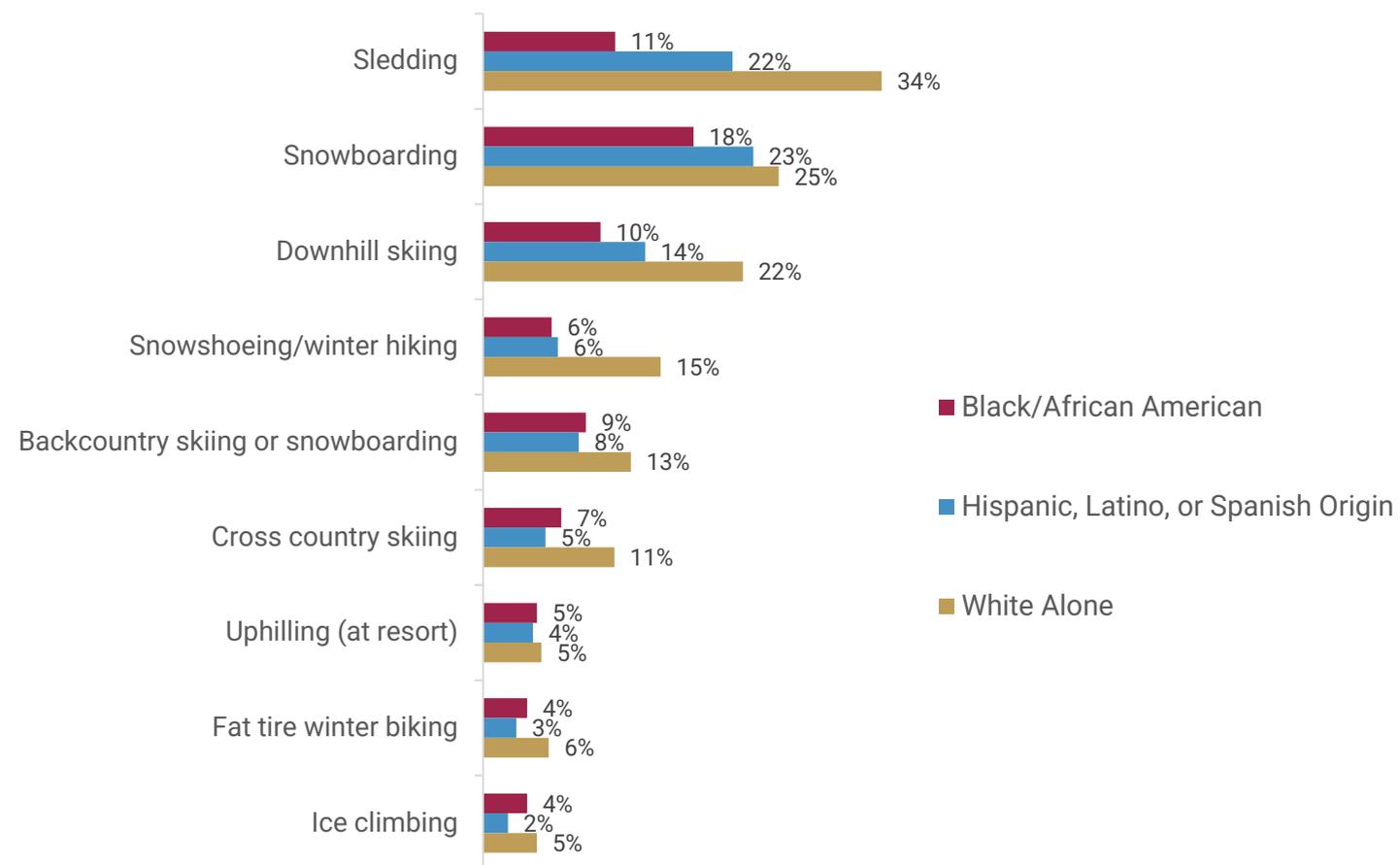
Respondents were asked to identify all activities that they had participated in as an adult. The graph on the left presents the percentage of respondents who identified any activity categorized as a snowsport. Note that non-participants were defined as those who had not participated in any of these activities as an adult, so their bar length is always 0%.

- Sledding, snowboarding, and downhill skiing were the most common snowsports.
- Respondents identifying as White alone were more likely to say they participated in most snowsports than People of Color. However, rates of participation in snowboarding were similar across racial/ethnic groups. This finding is consistent with SIA's participation studies which show greater diversity among snowboard participants.

Throughout this report, graphs present the attitudes of participants compared to non-participants. Participants are simply anyone who said they engaged in any of the activities presented in the graph on the left.

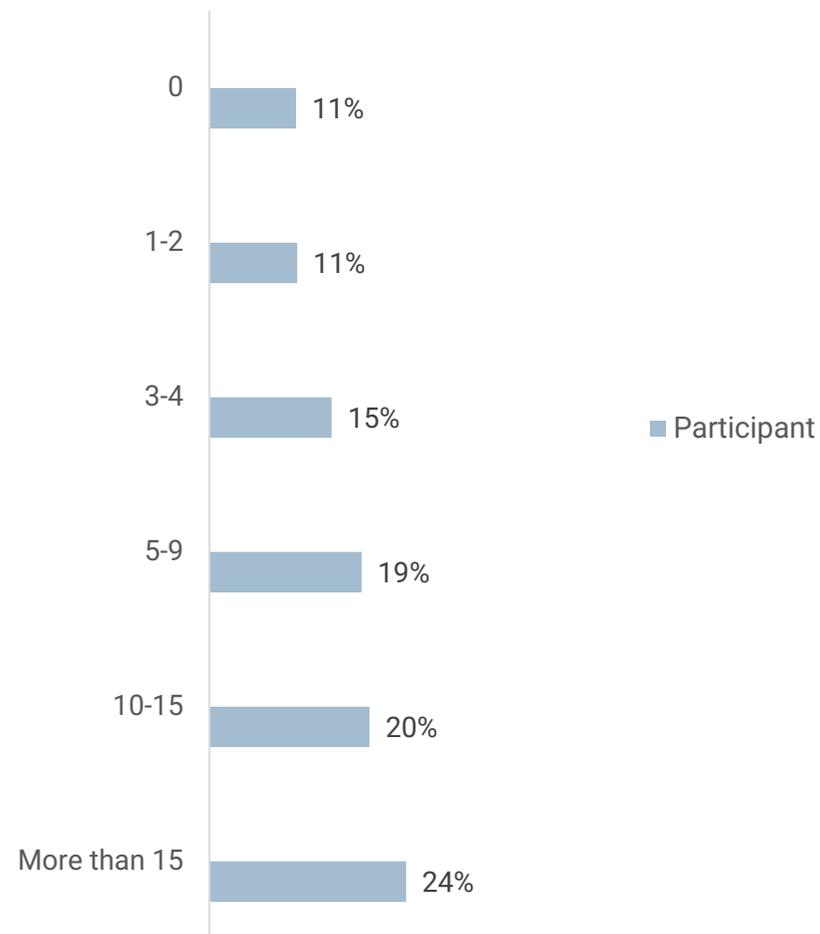
Snowboarding participation was similar across race/ethnicity

Percentage of Participants Who Participated In Snowsports as an Adult



Most participants spent more than five days engaging in snowsports

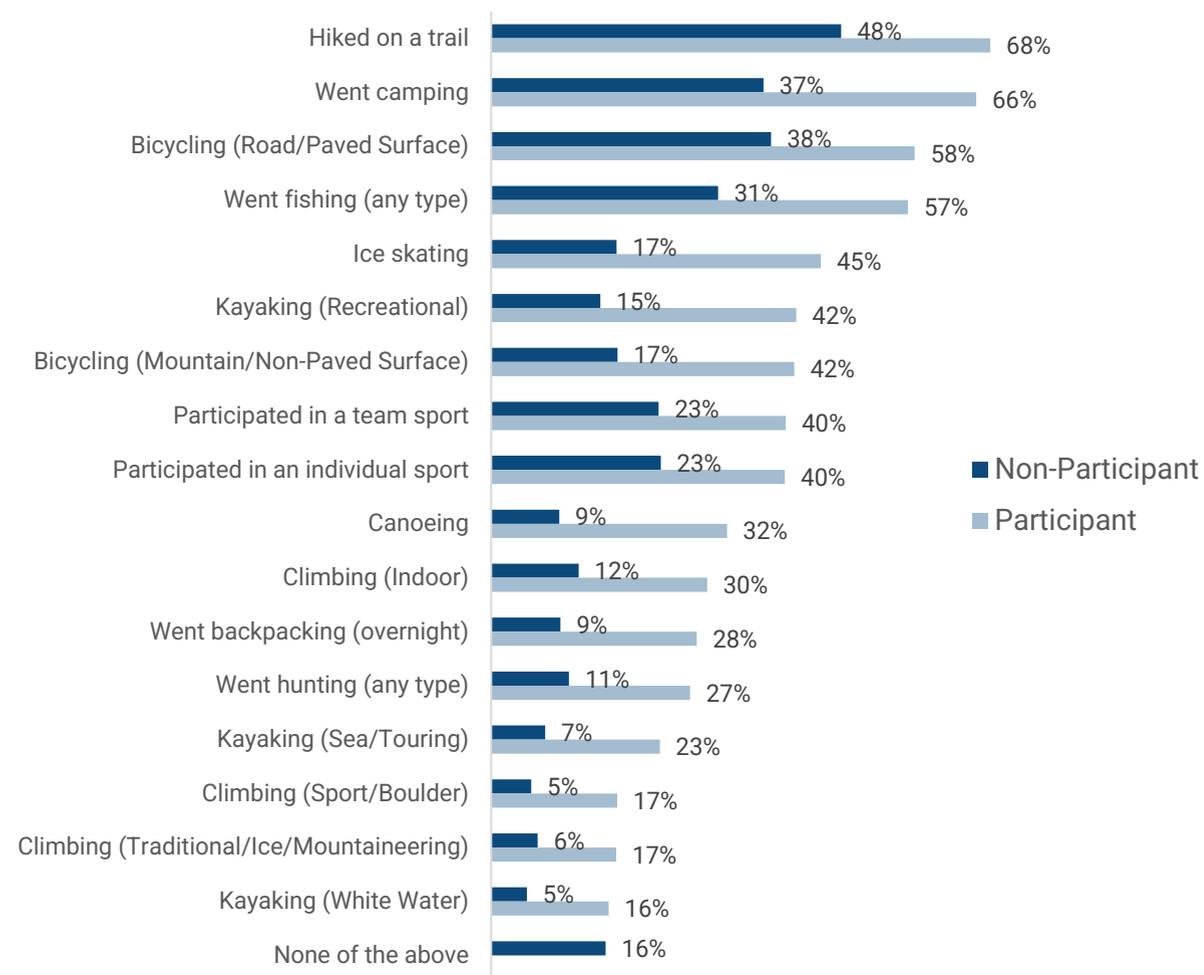
Number of Days Participating in Snowsports in the 2020-2021 Winter Season



- The median number of days snowsports participants said they spent in the 2020-21 winter season participating in snowsports was 7 days.
- Median participation was twice as high for White alone participants (10 days) than Hispanic participants of Color (5 days) or non-Hispanic participants of Color (5 days)
- Unsurprisingly, participants who said they would not have to travel to engage in snowsports activities had higher average and median rates of participation (17.6 and 10 days) than those who would have to travel (11.8 and 5 days).
- Those who had participated in cross country skiing as adults had higher average and median participation days (21.2 and 10) than those who had not (13.9 and 7).

Snowsports participants were more active in other activities, too

Other Activities Participated in as an Adult



- Hiking, camping, road biking, and fishing were among the most common outdoor activities for both participants and non-participants.
- However, snowsports participants said they participated in non-snowsport activities at higher rates than non-snowsport participants.
- Respondents identifying as White alone were more likely to have participated in most activities as adults. Disparities between respondents identifying as White alone and respondents of Color was largest in Hunting and Kayaking.
- LGBTQ+ respondents participated in most activities at similar rates as non-LGBTQ+ respondents. However, one exception was participation in individual sports where 25% of LGBTQ+ respondents said they had participated compared to 34% of others.
- Across activities, male respondents were more likely than female respondents to say they participated in each activity.



GENERAL LEISURE ACTIVITIES

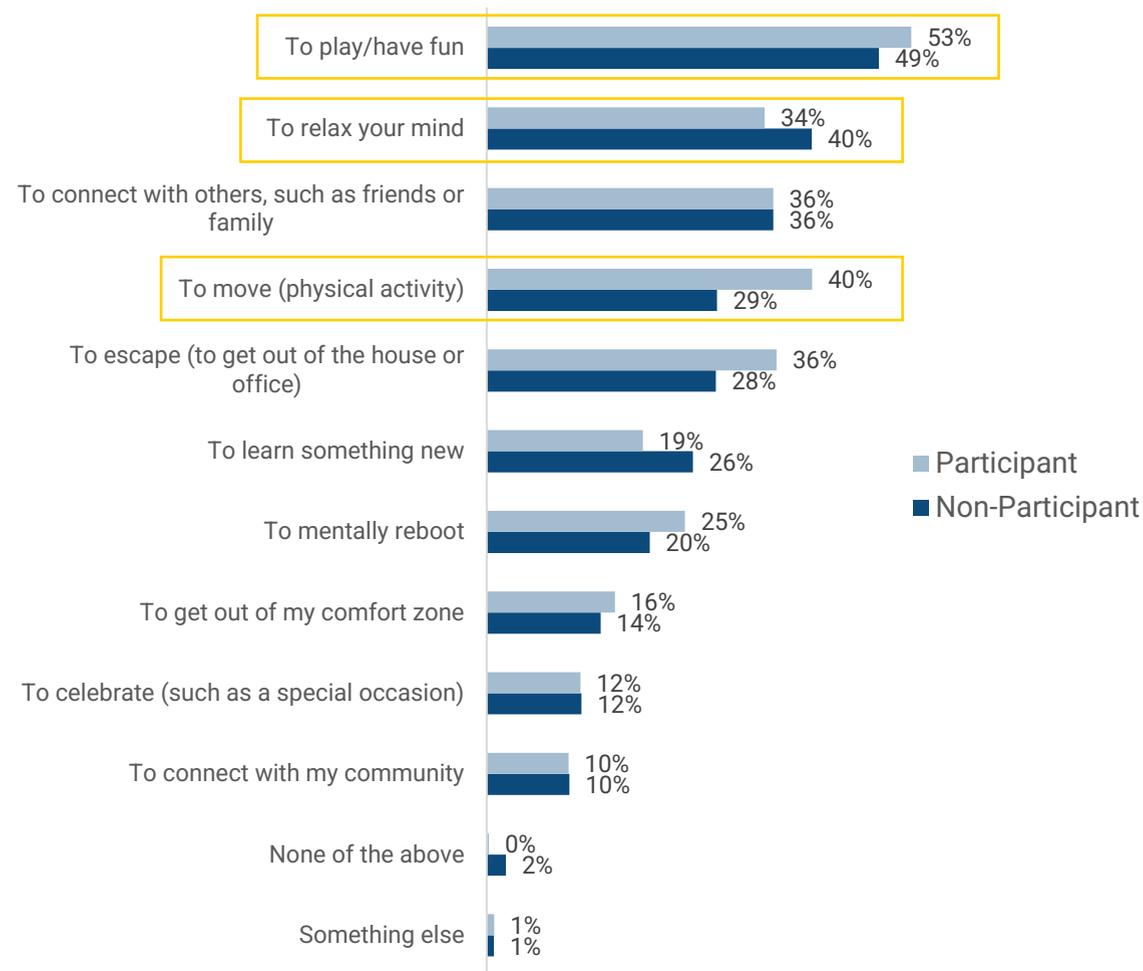


I think it's just important to stay outside in the winter. A lot of people get cooped up indoors...I feel better if I'm outside in the fresh air, even if it's like 10 degrees, which can be really hard, but you just have to have the right gear for it.

- LGBTQ+ participant

Non-participants desired relaxation more than physical activity

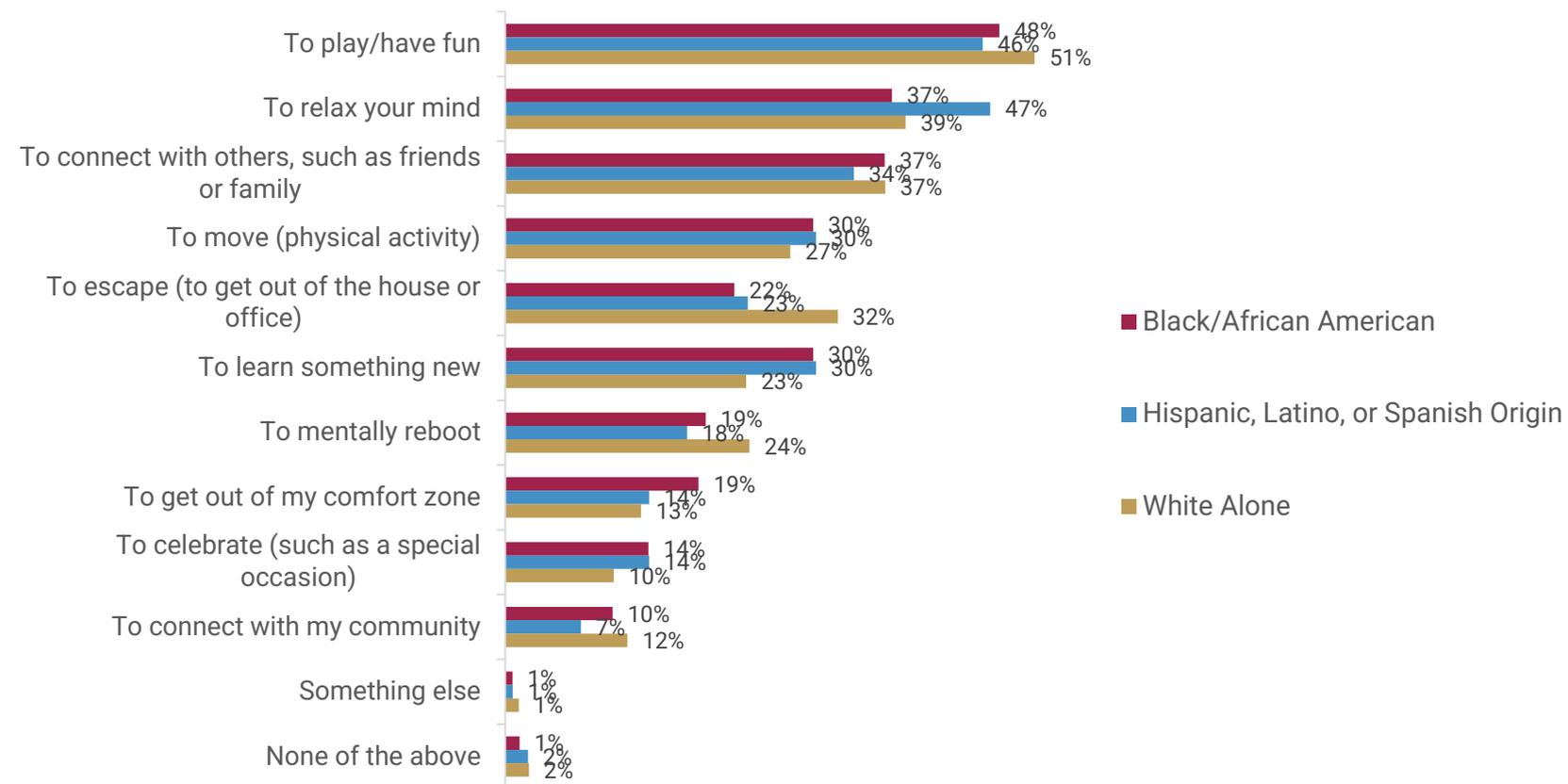
Reasons for Participating in Activities



- Reasons for participating in leisure activities were fairly consistent across segments with to play/have fun consistently coming in as the top desired reason across demographics.
- When asked to identify the reasons they participated in activities in their free time, participants were more likely to identify moving, or physical activity as a motivation (40%) than non-participants (29%).
- Respondents of Hispanic, Latino, or Spanish origin were about as likely to say to relax your mind (44%) as to play/have fun (42%), while non-Hispanic respondents had a larger spread between these two reasons (36% and 52% respectively). These differences can be seen on the next slide.

Non-participants generally had similar desires from leisure across race/ethnicity

Non-Participant Reasons for Participating in Activities





PERCEPTIONS & ATTITUDES

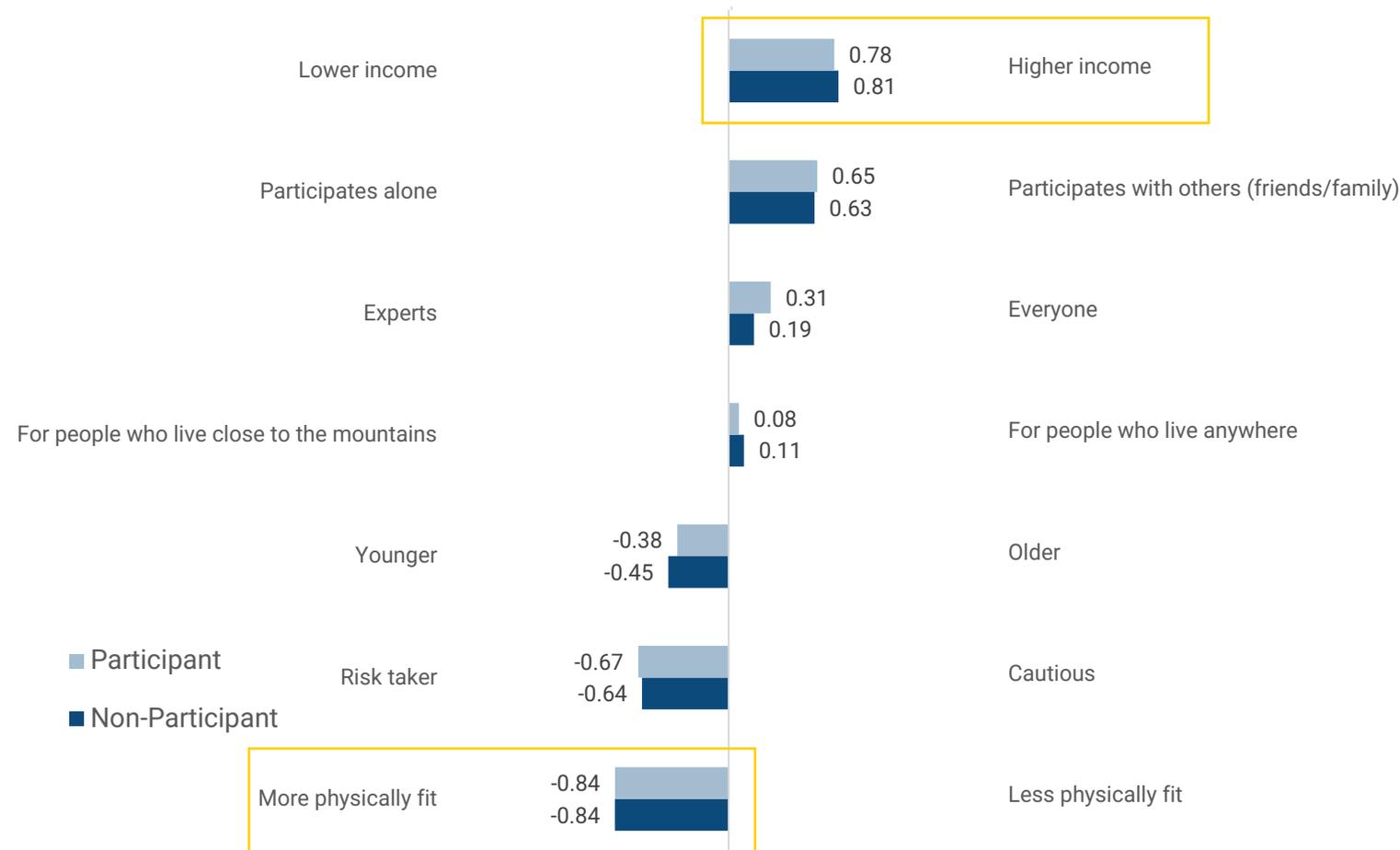


[Who is it for?] Everyone? I think this is what I've recently experienced and I think it transfers over, but a lot of these activities do come down to money because equipment is expensive, but you can rent it. ...You don't have to be in the world's greatest shape to be able to engage in a lot of these different things.

- Hispanic/Latinx participant

Snowsports participants are perceived as high income and physically fit

Snowsports Participants Are...



All respondents were asked to describe snowsports participants across a series of descriptors. Respondents were shown pairs of descriptors (such as risk taker vs. cautious) and asked to indicate how they would describe snowsports participants by selecting a bubble closer to the phrase they believed best described snowsports participants (or in the middle if both options equally well described snowsports participants). The scale runs from -2 indicating the term on the left best describes snowsport participants to +2 indicating the term on the right best describes them.

- Participants and non-participants held similar opinions, overall.
- While respondents generally agreed that snowsports participants were higher income and more physically fit, they were more split on what geographic location best described participants.
- Responses were generally similar across demographic segments.

Some snowsports are perceived as more welcoming than others

- Interviewees that had participated in various snowsports noted that some could be perceived as more welcoming than others. One factor that contributed to this was ease of participating. For example, sledding required less equipment and athleticism than snowboarding.
- Interviewees felt more self-conscious when participating in some sports as opposed to others. General athleticism and skill contributed to that self-consciousness, but other factors, such as having the “best” gear or equipment were also noted.
- When asked if a sport was welcoming, many interviewees considered the sport’s accessibility for a beginner to learn and whether the sport has a reputation for exclusivity (e.g., being only for wealthy or very athletic people). Ice skating, for instance, was seen as more accessible than skiing.



Everyone I see out there is wearing expensive snow pants and brand name jackets. I wonder if they're looking at me, and what I'm wearing, and my borrowed gear, and think that I don't belong here.

- Hispanic/Latinx skiing/snowboarding participant

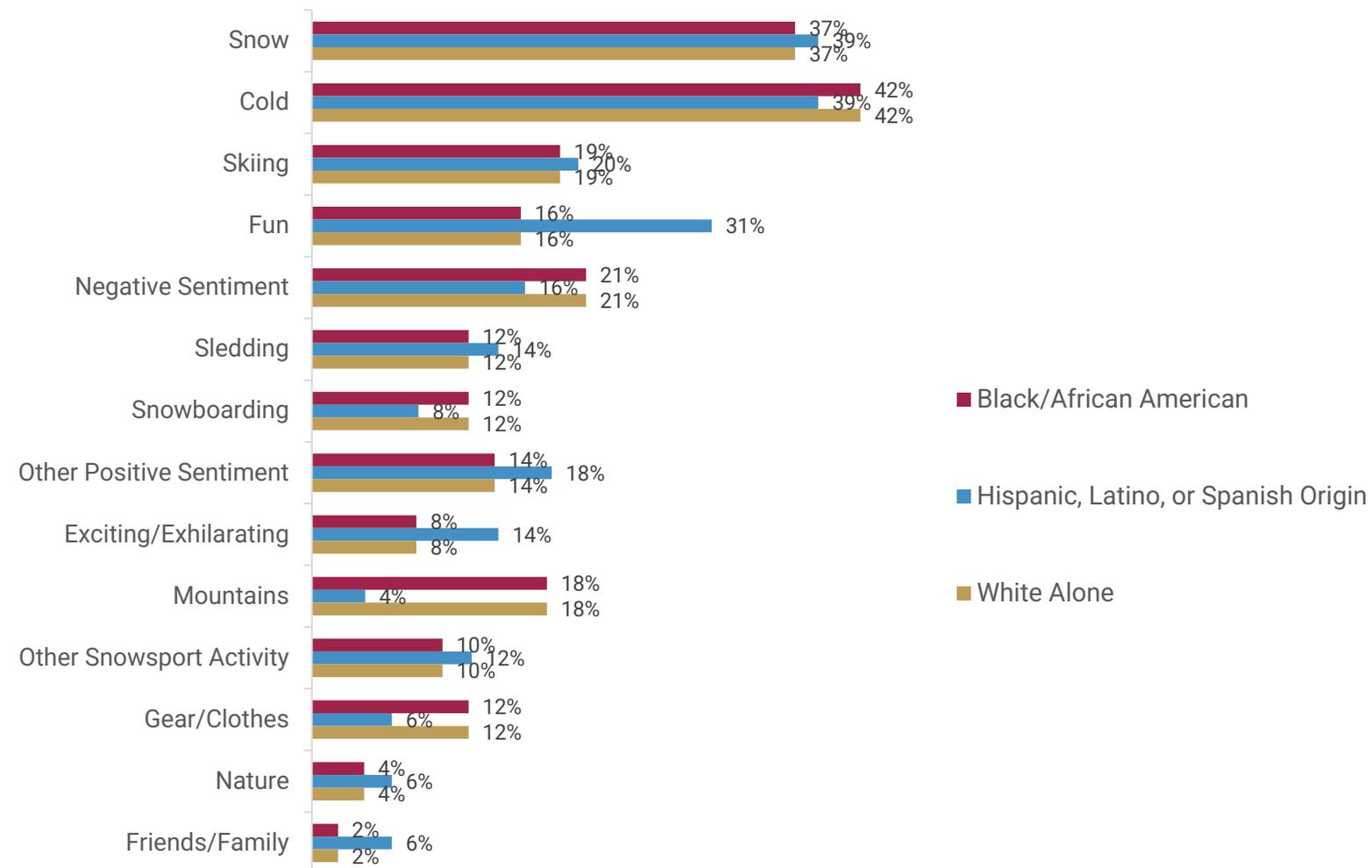


It never felt exclusionary. I never felt like I had to like make a certain amount of money or I had to be in a certain social class to actually participate and get fulfillment out of the sport.

- African American/Black snow hiking participant

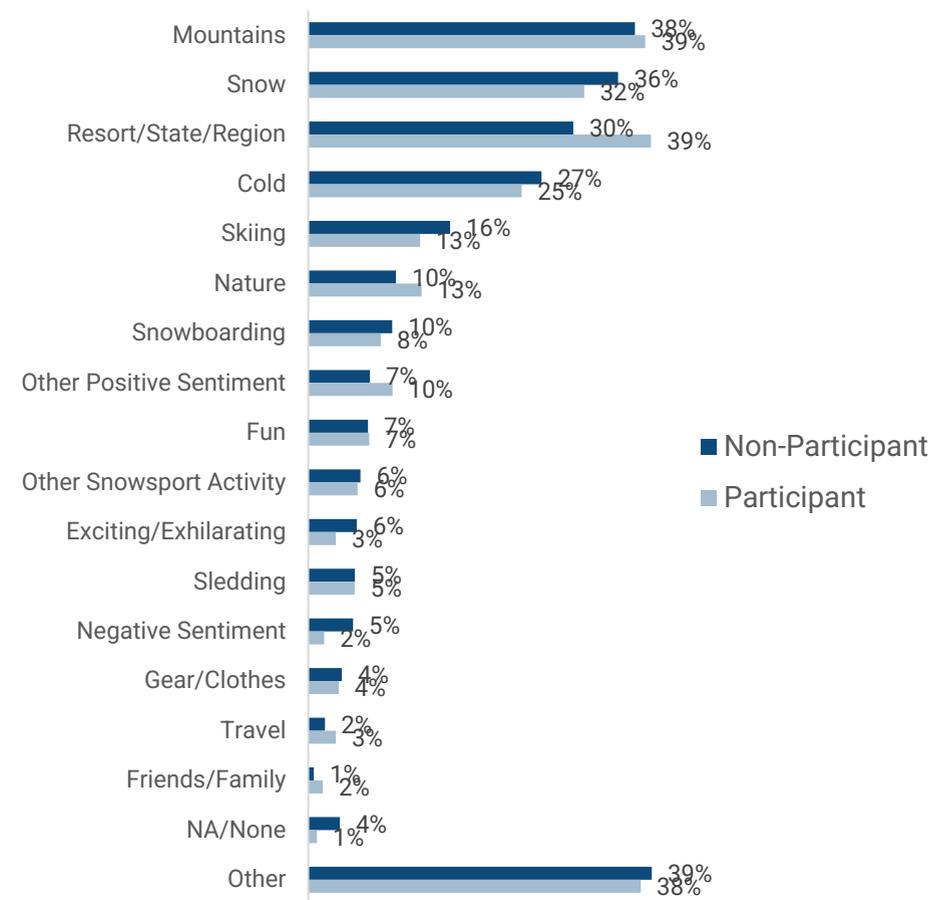
Hispanic non-participants were more likely to associate snowsports with fun

Top Three Words or Phrases That Come to Mind When Non-Participants Think About Participating in Snowsports



Mountains and snow were associated with snowsports locations

Top Three Thoughts or Images That Come to Mind When Thinking About The Location Where You Might Participate in Snowsports

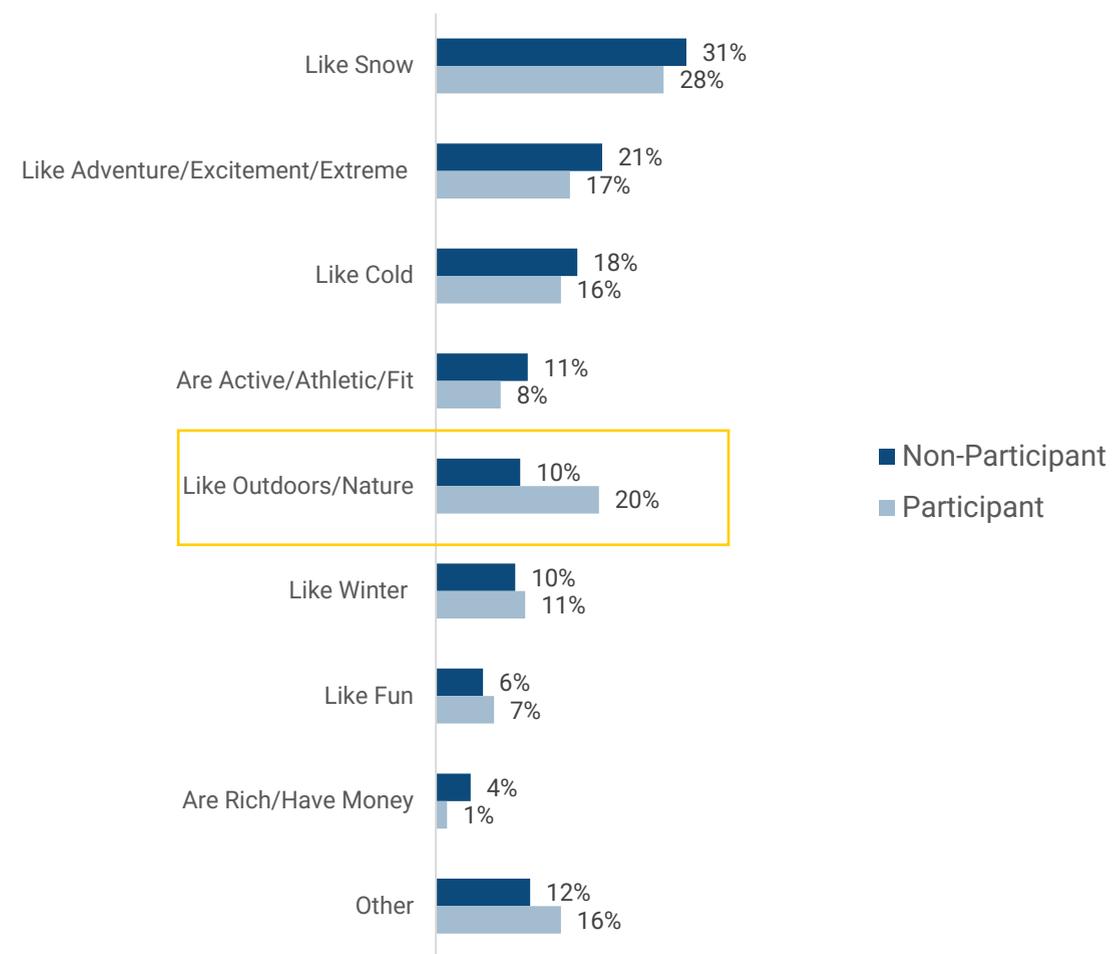


Respondents were asked to give three thoughts or images that come to mind when thinking about the location where they might participate in snowsports. The graph on the left presents those responses coded into the most frequent categories.

- The most common thoughts or images non-participants associated with these locations were mountains, snow, and a specific resort, state, or region.
- Participants were more likely to associate locations with specific resorts, states or regions (39%) than non-participants.

Participants were more likely to associate snowsports with nature

Finishing The Sentence: Snowsports Are For People Who...



Respondents were asked to finish the sentence: Snowsports are for people who...

Responses were then coded into the categories presented in the graph on the left.

- The most common response referenced a proclivity for snow.
- Participants were twice as likely (20%) as non-participants (10%) to suggest that snowsports are for those who like nature or being outdoors.
- Non-participants were slightly more likely to say that snowsports were for people who like adventure, excitement, or extreme experiences (21%) than participants (17%).

Interviewees were unaware of all the various types of snowsports

- When asked what snowsports interviewees were aware of, skiing and snowboarding were top of mind for all interviewees, along with sledding and a few other sports that they could identify from widely viewed events like the winter Olympics.
- Few were aware that hiking and riding a bike in the snow were considered snowsports.
- Some interviewees had never heard of some snowsports, like fat tire biking; upon learning about those, they decided that those were activities that they would be interested in trying.



I would definitely think of skiing, I know there are a lot of types of skiing, like downhill and cross country. So mainly skiing, I guess snowboarding would be one as well... Those are kind of the ones I think of as snow sports.

- Asian non-participant



CURRENT PARTICIPANTS ENGAGING IN SNOWSPORTS

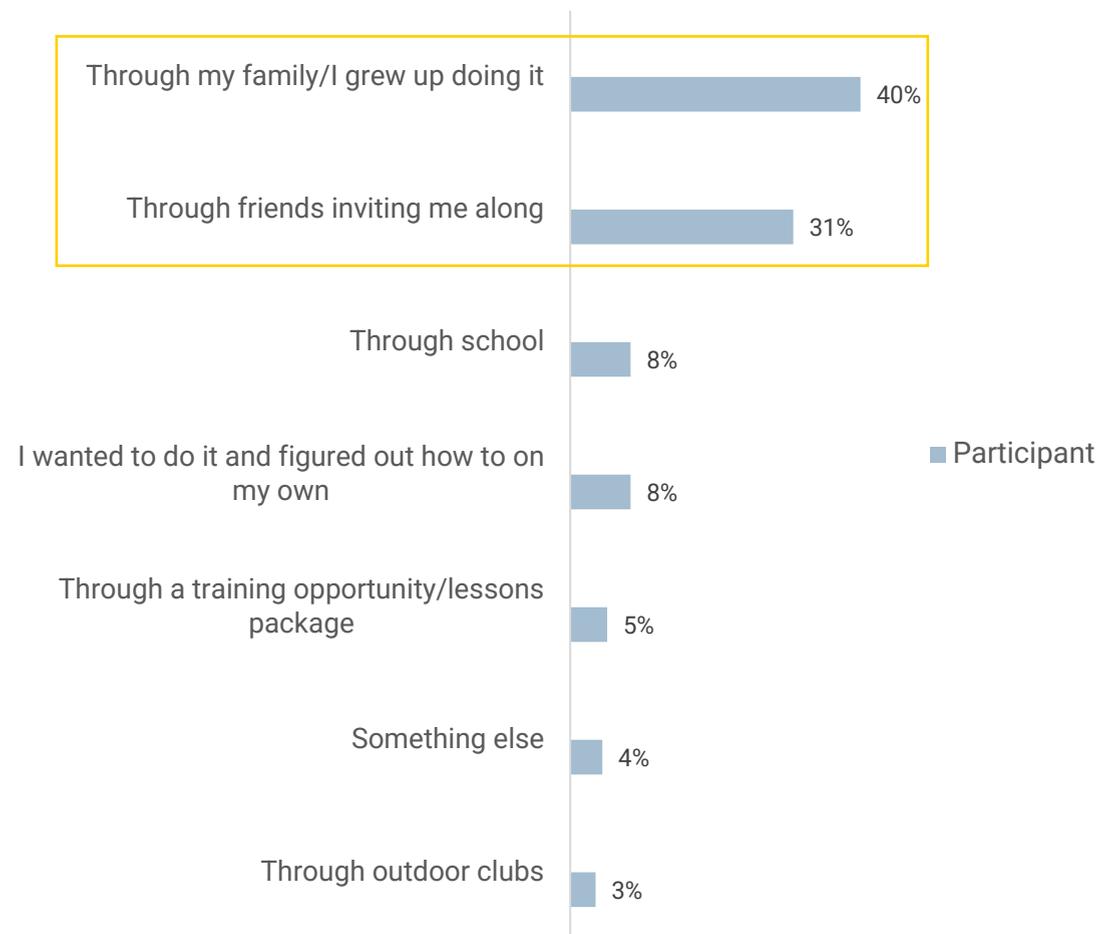


Honestly, I just fell in love with it when I was so young, and I haven't stopped feeling that way. We made the move out here [to Utah], but I've been wanting to do this for some time because I just knew that I wanted mountains and skiing. Deep down, I can't even really pinpoint what drives me, there are a lot of things that I like and enjoy in life, but I truly love skiing, downhill skiing for sure.

- LGBTQ+ participant

Most participants started through family and friends

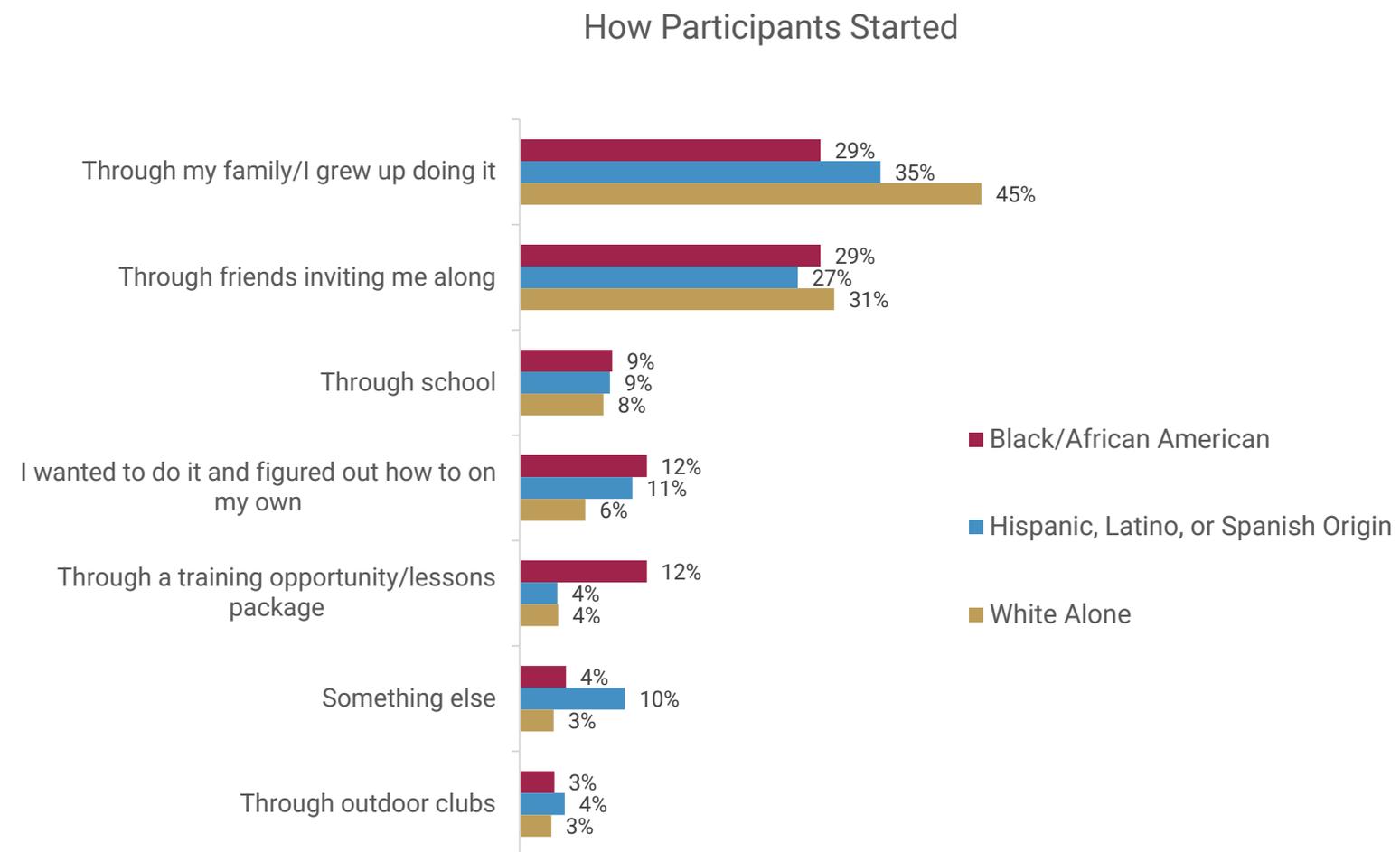
How Participants Started



Participants were asked how they originally got started engaging in snowsports activities.

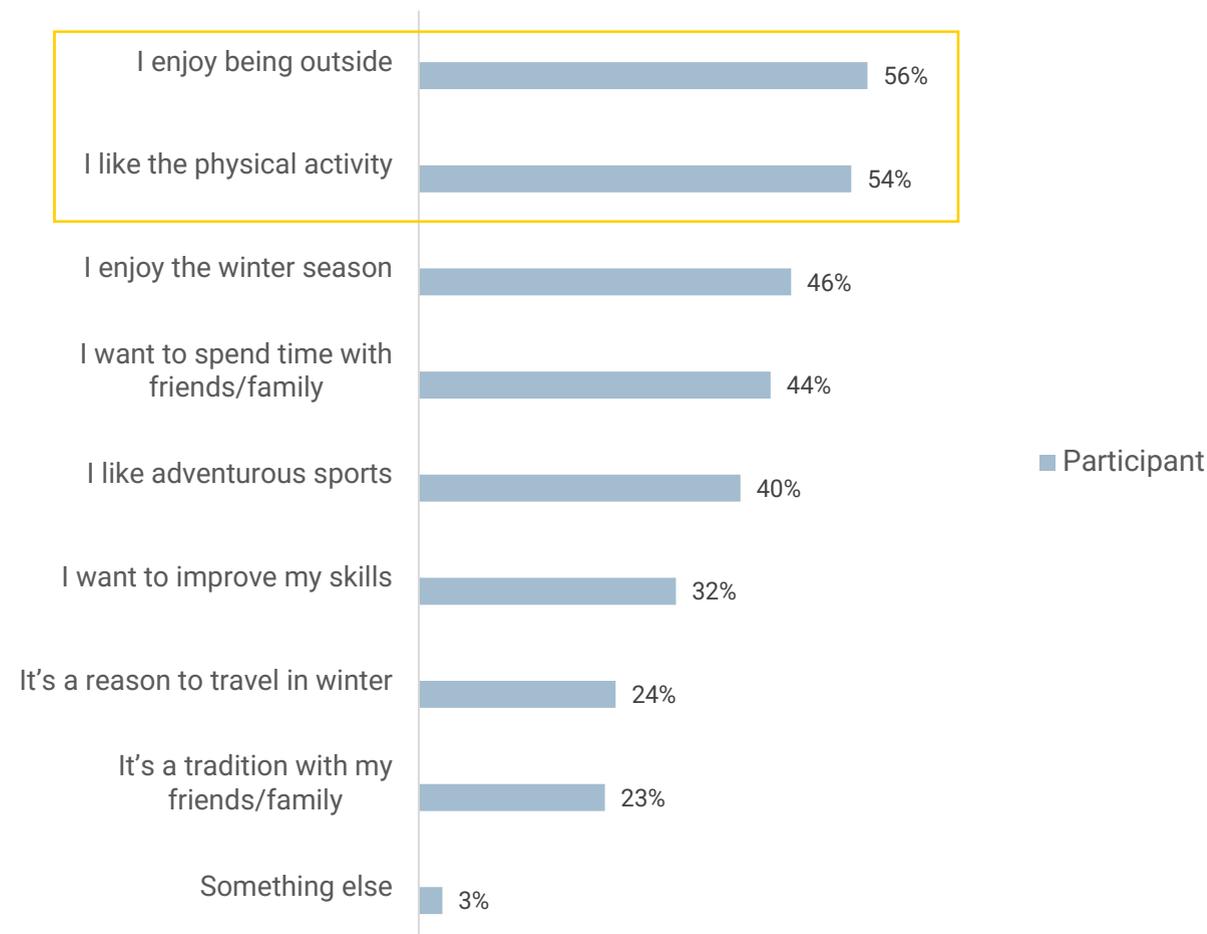
- The most common response was saying, “through my family” or “I grew up doing it.” However, White alone participants were more likely to select this option (45%) than Hispanic participants of Color (35%) and non-Hispanic participants of Color (29%).
- Nearly one out of three participants (31%) said they started through friends inviting them along. Black respondents were as likely to say they started through friends inviting them along (29%) as through my family/I grew up doing it (29%).

White alone participants were most likely to have grown up with snowsports



The outdoors and physical activity keep participants active in snowsports

What Keeps You Participating in Snowsports

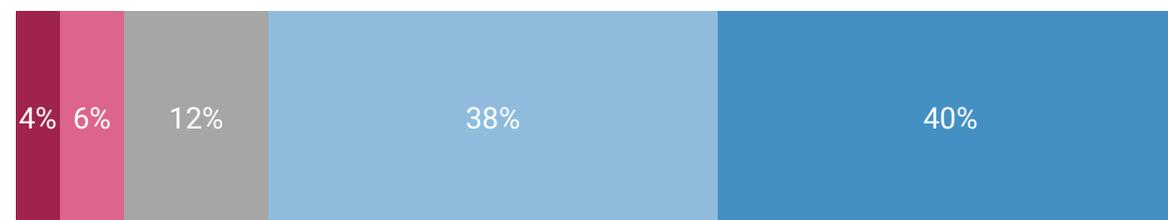


Participants were asked why they continue to participate in snowsports.

- Most said that they enjoy being outside (56%) and like physical activity (54%) as reasons.
- White alone participants were more likely to say I like being outside (60% compared to 49%) and I want to spend time with friends/family (48% compared to 36%) than participants of Color.
- Males were more likely than females to say they like adventurous sports (46% compared to 34%) and less likely to say I want to spend time with friends and family (35% compared to 51%).

Most participants wish they could participate in snowsports more

Agreeing That I Wish I Could Participate in Snowsports More
(Among Participants)



■ Strongly disagree ■ Somewhat disagree ■ Neutral ■ Somewhat agree ■ Strongly agree

- Male participants were more likely to strongly agree that they wished they could participate in snowsports more (50%) than female participants (32%).
- While not statistically significant, Black participants said they strongly agree with this statement at a lower rate (26%) than White respondents (42%).
- When interviewees were asked what they would do if they could no longer participate in their current snowsport, many participants were interested in trying another snowsport (versus a different activity altogether), usually one that they perceived as more challenging.

Most negative experiences were a result of an injury

- When interviewees had a negative experience to share, the anecdotes were usually about an accident that resulted in an injury.
- Interviewees were also aware of the discomfort that can happen as a result of equipment, being out in cold weather, or even just physical activity in general.
- In a few instances, participants recalled feelings of embarrassment when first trying out an activity.



The discomfort of the clothing, being active and under all those layers, made you hot and sweaty.

- Participant



PROSPECTIVE PARTICIPANTS ENGAGING IN SNOWSPORTS

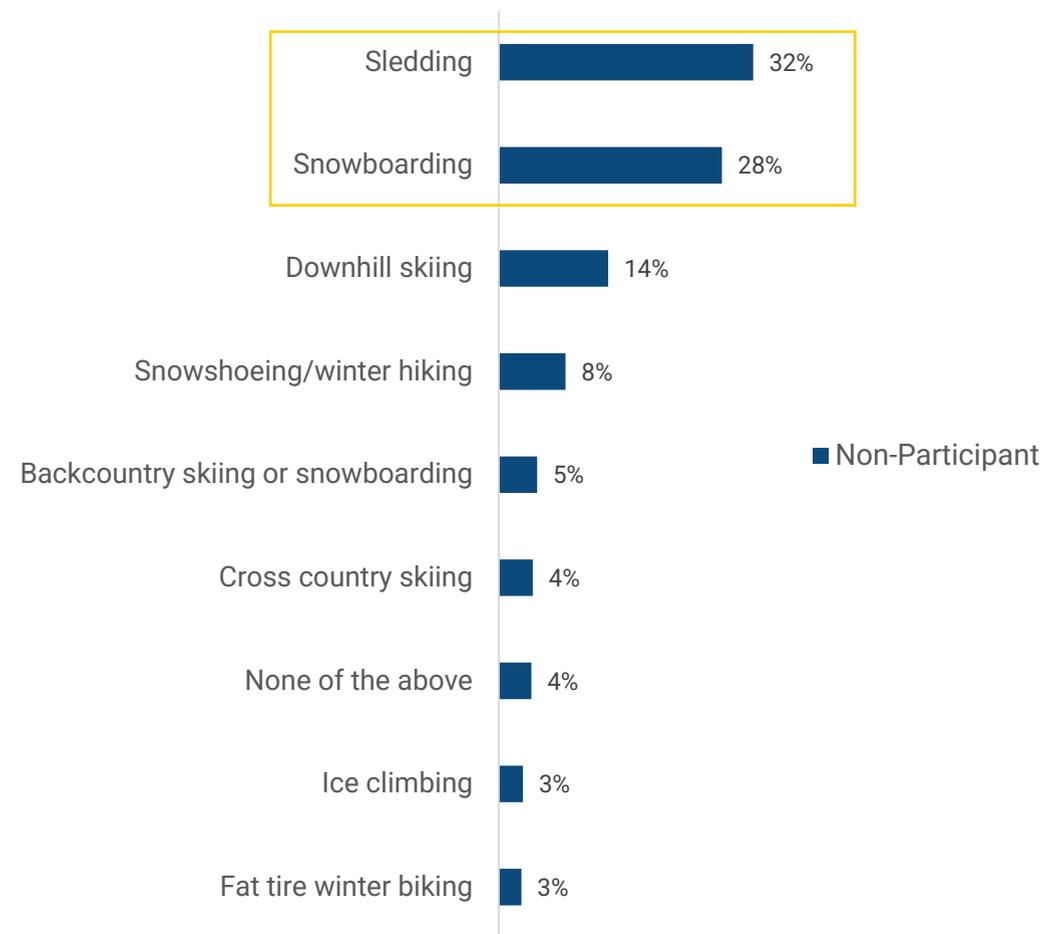


[After trying it for the first time] I would expect to feel like I worked out really hard, but I would probably feel proud of myself for attempting it and seeing how that went. A little exhilarated, just like from the post workout tired you get from the adrenaline.

- LGBTQ+ non-participant

Non-participants were most interested in sledding and snowboarding

If You Were to Choose a Snowsport Activity to Participate in This Winter, What Would it be?

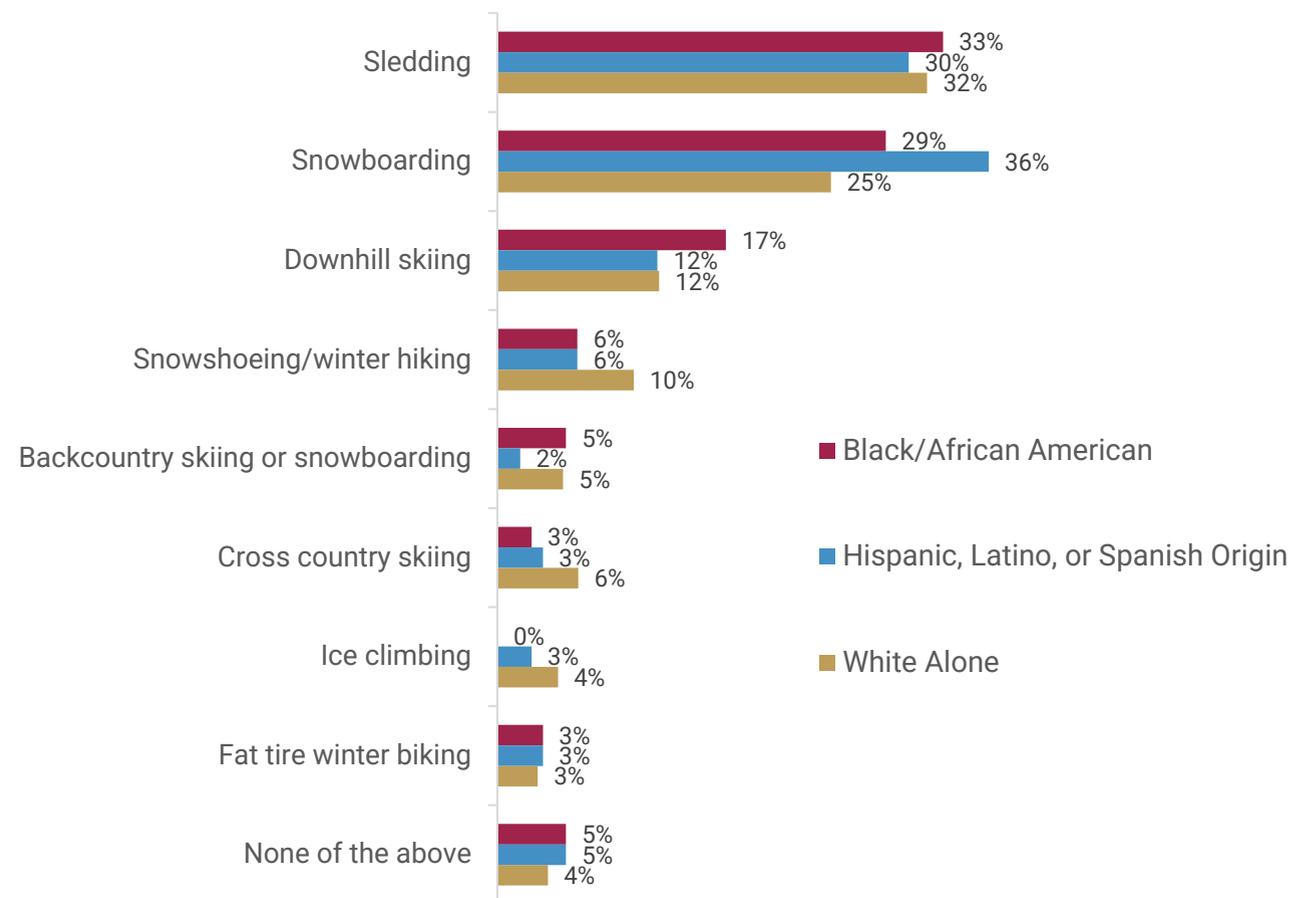


Non-participants were asked if they were to choose a snowsport activity to participate in this winter, what would it be?

- About one out of three said they would choose sledding (32%) and more than one quarter said snowboarding (28%).
- While preferences were generally similar across demographics, one difference was within gender. Males were most likely to select snowboarding (36%) compared to just 22% of females. Alternatively, 40% of females said they would participate in sledding compared to just 19% of males.
- In interviews, the non-participants in snowsports were most interested in trying activities that they perceived as more accessible like sledding, hiking, and especially ice skating.
 - Several participants, both current and prospective wanted to try or wanted to go ice skating more often.
 - Ice skating was a highly desirable activity because it is something that participants can do without significant travel. Participants also viewed it as a traditional winter activity.
- Interviewees were interested in visiting resorts for the experience and while there, they wanted to try activities like skiing, snowboarding, and bob sledding.

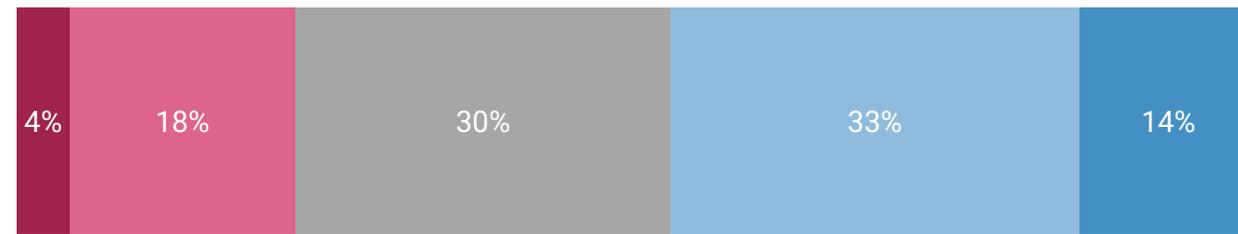
Hispanic non-participants showed the highest level of interest in snowboarding

If You Were to Choose a Snowsport Activity to Participate in This Winter, What Would it be?



Nearly half of non-participants said they would try a snowsport this coming winter

How Likely Non-Participants Are to Participate in Their Chosen Snowsport Activity This Coming Winter



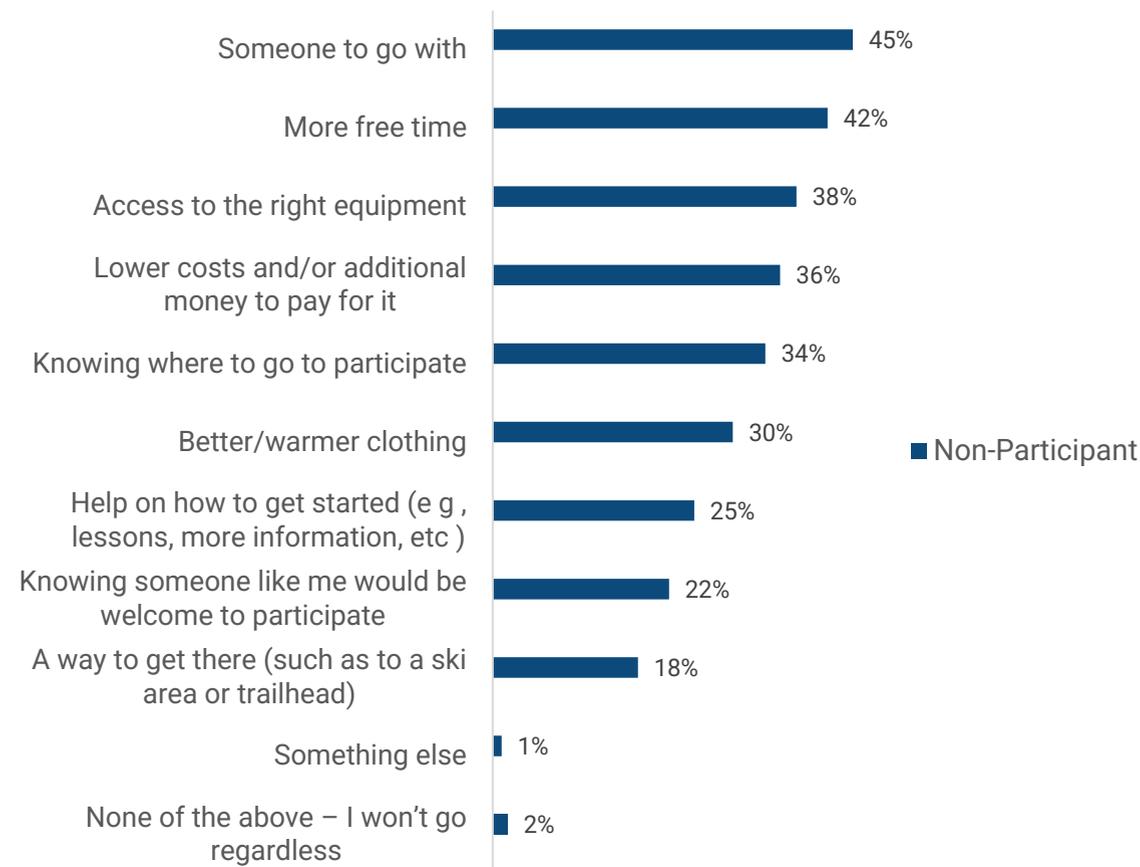
■ Definitely will not ■ Probably will not ■ Neutral/unsure ■ Probably will ■ Definitely will

After answering what snowsport activity they would be most likely to try, non-participants were asked how likely they were to participate in that activity this coming winter.

- Nearly half (47%) said they would probably or definitely would participate in that activity. It is important to note that the follow-through on reported intentions like these is often quite low. It is likely that only a fraction of these respondents will actually participate in this snowsport during the coming winter, yet this does show a general interest in doing so.
- Lower income individuals were much less likely to say they definitely would (7%) than those with household incomes of \$100,000 or more (28%).
- Parents/guardians said they would definitely participate at higher rates (21%) than non-parents (7%).
- Non-participants living in urban areas said they would definitely participate at higher rates (20%) than those from suburban (10%) or rural areas (12%).

Non-participants wanted someone to go with to engage in snowsports

What Would it Take For You to Participate in Your Most Desired Snowsport Activity?

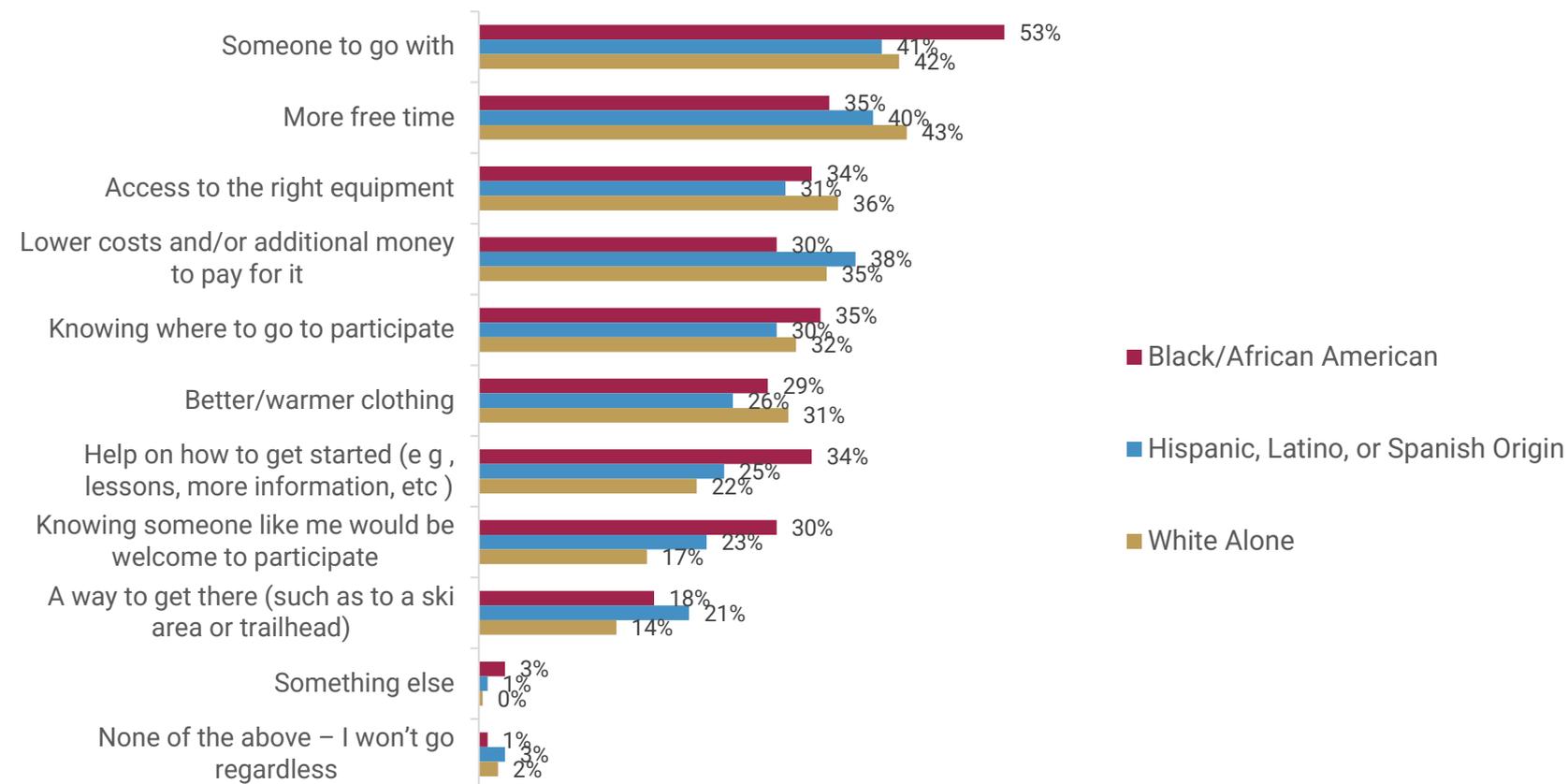


Non-participants were asked what it would take for them to participate in their chosen snowsport.

- The most frequent option chosen, selected by 45% of non-participants, was someone to go with, and having more free time was a close second (42%).
- About one out of five non-participants (22%) said “knowing someone like me would be welcome to participate” would be what it took to engage in their preferred snowsport.
- Very few (2%) non-participants said they would not go under any circumstances.

Most Black non-participants said it would take someone to go with to participate

What Would it Take For You to Participate in Your Most Desired Snowsport Activity?

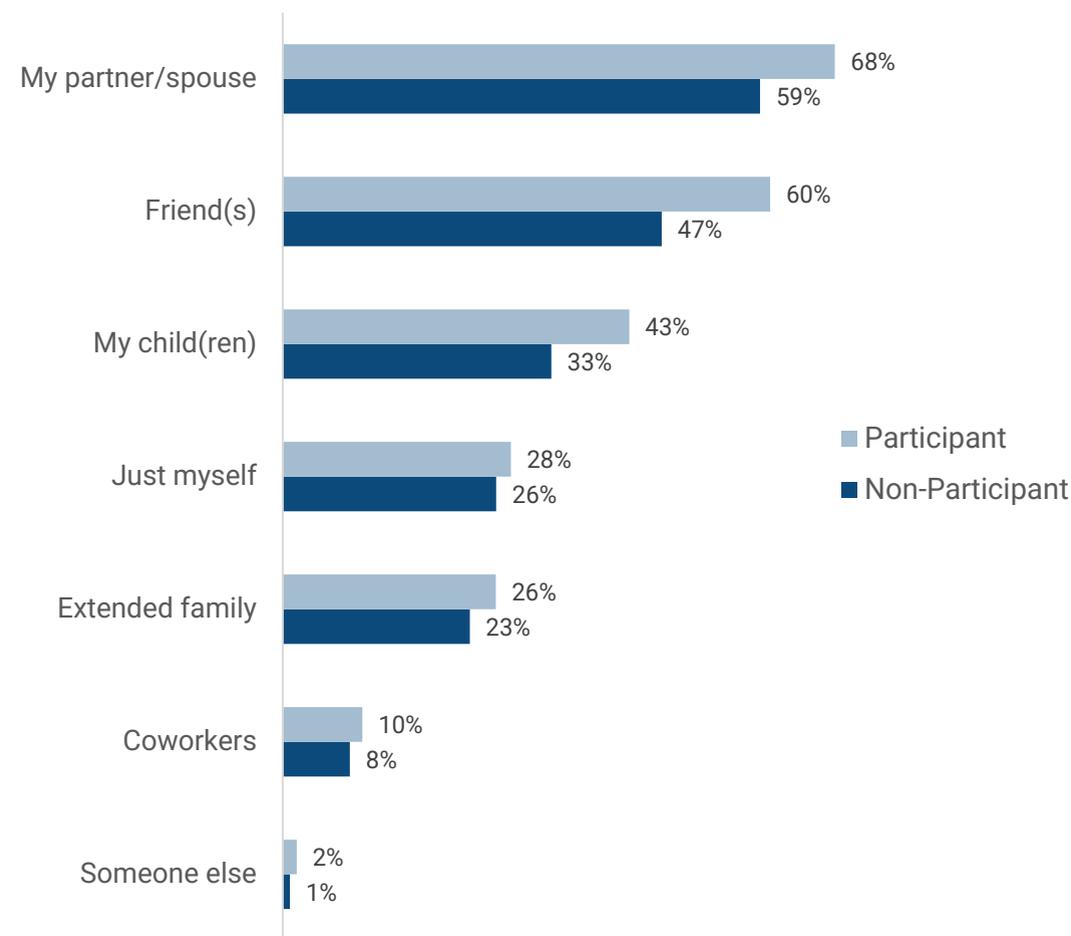


Non-participants see snowsports as a way to create memories with their family, but worry about the difficulty of snowsports

- Most non-participants interviewed had not taken any actual steps to planning a snowsports trip and/or activity. They had only thought about it or talked with friends and family.
- In order to start participating in snowsports and going on trips, prospective participants recognized that they needed to keep snowsports top of mind and begin planning in advance.
 - Those participants who had started to make plans were unable to fulfill them due to circumstances out of their control, an example being the recent pandemic.
- Snowsport activities had the potential to become a family activity that participants could introduce their children to and take trips for.
 - Even if the participant hadn't recently participated in any snowsports, they recalled childhood memories of winter recreation with their families and hoped to expose their children to that.
- Some concerns that prospective participants think they might encounter after spending a day participating in a snowsport of their choice included:
 - Feelings of failure if they were unable to pick up the sport or were slower than others to learn.
 - Similarly, feeling embarrassed and awkward because they are self-conscious about being new.
 - Potentially getting injured.
 - Realizing that they do not like the sport and feeling regret.

Most wanted to participate in snowsports with their partner/spouse

Who Would You Participate in Snowsports With



Respondents were asked if they were to participate in snowsports, who would they go with?

- Most said they would want to do so with their partner/spouse, however, participants said so at even higher rate (68%) than non-participants (47%).
- Participants were more likely to say they would go with a friend or friends (60%) than non-participants (47%). This difference may reflect non-participants having smaller or non-existing networks of friends who participate.
 - Relatedly, interviewees wanted to participate with their friends and family. Some stressed the importance of going with someone who was more experienced while others preferred to be around others experiencing the activity for the first time.
 - Even though some interviewees wanted to participate in snowsports with their families, they wanted to try it themselves first to be able to guide their family through the experience.
- LGBTQ+ respondents were more likely to say they would go by themselves (35%) than with others (26%).



BARRIERS TO ENTRY

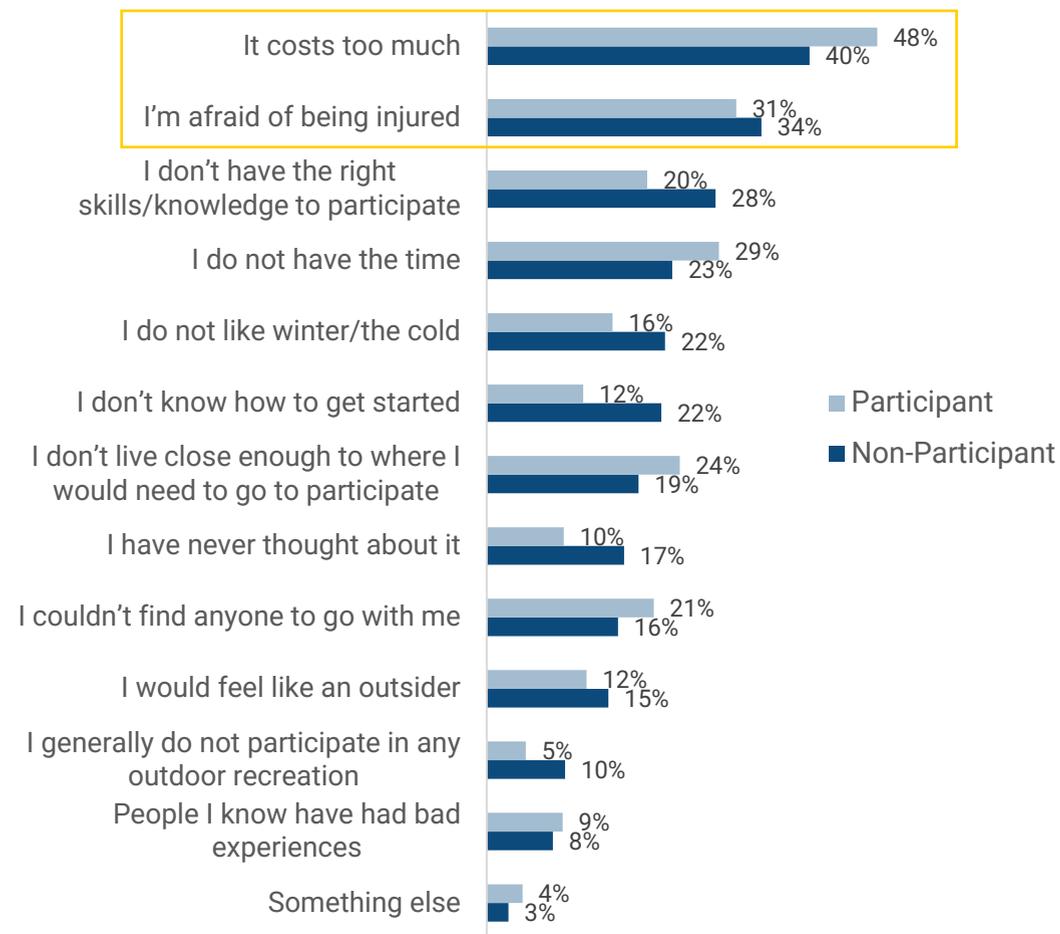


As an adult, things have become harder...I think my only reservation about skiing is hurting myself. I don't have the best knees sometimes and I know that skiing is all in your knees, I believe that's how you move yourself. If I went down like a very beginner hill and had an instructor with me or a professional with me, I would do it for sure.

- Hispanic/Latinx non-participant

Cost and injury concerns were the biggest barriers to participation

Reasons for Not Participating in Snowsports as Much as Desired

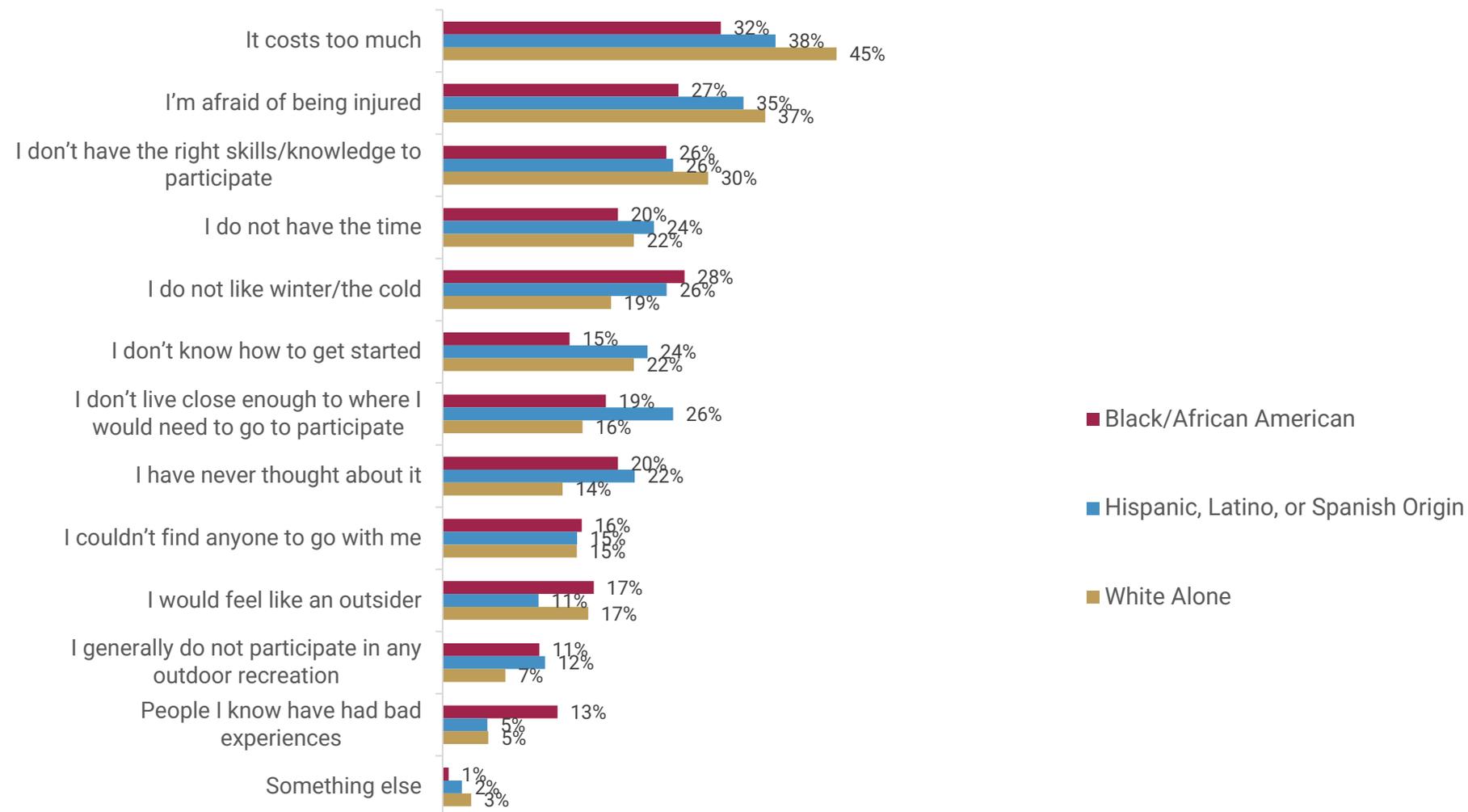


Respondents were asked to identify any and all barriers that have stopped them from participating in snowsports in the past.

- The most commonly identified barrier was cost, selected by 48% of participants and 40% of non-participants.
- About one out of three respondents selected fear of being injured as a barrier.
- Hispanic People of Color (9%) and non-Hispanic people of Color (12%) were more likely to say they generally do not participate in outdoor recreation than White alone respondents (5%).
- Female respondents were more likely than males to select fear of being injured (37% compared to 26%), not having the right skills/knowledge (28% compared to 18%), and not liking winter/cold (22% compared to 14%).
- 21% of participants indicated that not having anyone to go with was a barrier. This theme was also heard during the interviews where many noted that they would participate more if they had someone else to go with them.

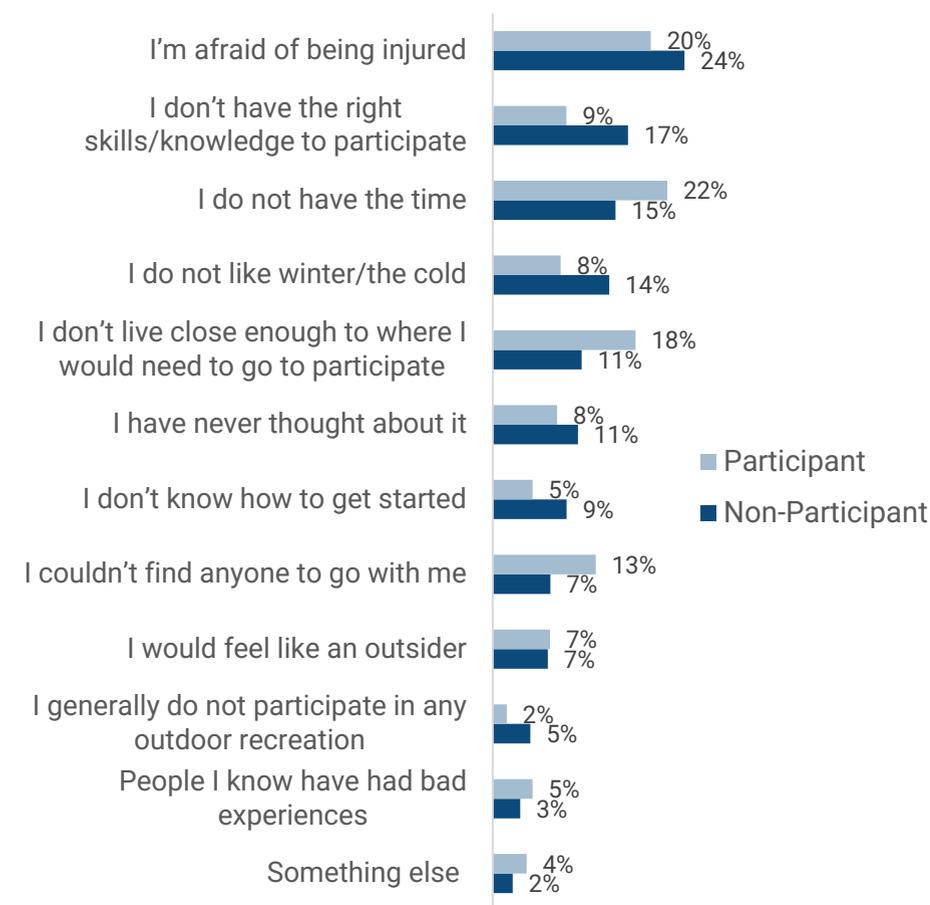
White alone non-participants most frequently mentioned cost as a barrier

Non-participant Reasons for Not Participating in Snowsports as Much as Desired



About one quarter of non-participants cited injury concerns as the primary barrier

Primary Reason for Not Participating in Snowsports as Much as Desired (Cost Not an Option)

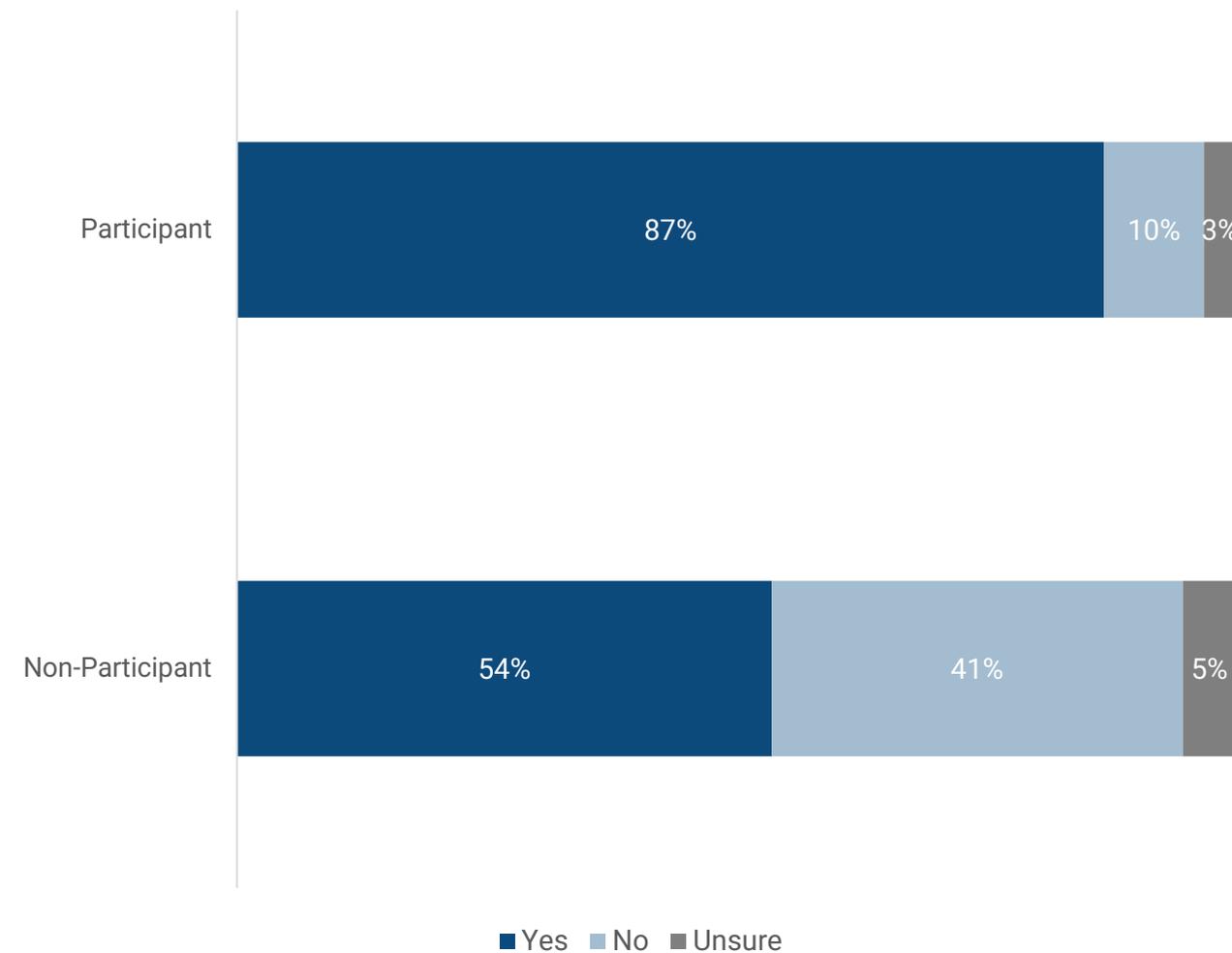


Respondents were then asked to identify the primary reason among all of the barriers they selected that they did not participate in snowsports as much as desired. Cost was not presented as an option.

- The most common primary barrier for participants was not having enough time (22%) while non-participants most frequently selected fear of being injured (24%).
- Nearly one out of five non-participants (17%) said the primary barrier was not having the right skills/knowledge to participate.
- Black respondents were more likely to say they generally do not participate in any outdoor recreation (7%) than White alone participants (1%). Beyond this difference, the outcomes were similar across race/ethnicity.
- Relatedly, during interviews with non-participants, interviewees revealed they were reluctant to be a 'newbie', and they did not want to feel embarrassed or feel like they were being judged.

Only about half of non-participants knew a snowsport participant

Do You Know Someone Who Participates in Snowsports?



- While nearly nine out of ten participants (87%) said they knew someone who participates in snowsports, only about half (54%) of non-participants said they did.
- White alone respondents were much more likely to say they knew someone who participated in snowsports (79%) than Black (56%) or Hispanic (67%) respondents. This disparity across race/ethnicity was also observed within non-participants.
- Respondents with lower household incomes (\$30,000 to \$49,999) were less likely to know someone who participates in snowsports (59%) than those who made more than \$100,000 (82%). Similarly, the percentage of respondents who knew someone increased with educational attainment.

Discounts, how-to's, and help with planning were all suggestions on removing barriers

Interviewees proposed ideas to incentivize more people to participate and encourage more frequent participation.

- Many of the incentives suggested were to help reduce the overall cost, such as promotions and discounts geared towards first timers.
- Having more guidebooks and/or how to's for the sports, including equipment was also mentioned.
 - Relatedly, interviewees noted that ensuring that prospective participants are well informed on all their options - from the various types of snowsports they can try to the various options they have to acquire the needed equipment and accommodations - is essential to promoting inclusivity.
- Finally, having tools that can help with organizing and planning trips – especially for larger groups – was noted.

“

If I heard more about it, maybe more advertising, maybe a special, if you bring a friend, then it's a discount for the next friend or something like that.

- Asian non-participant



Snowsports
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America

INCLUSION



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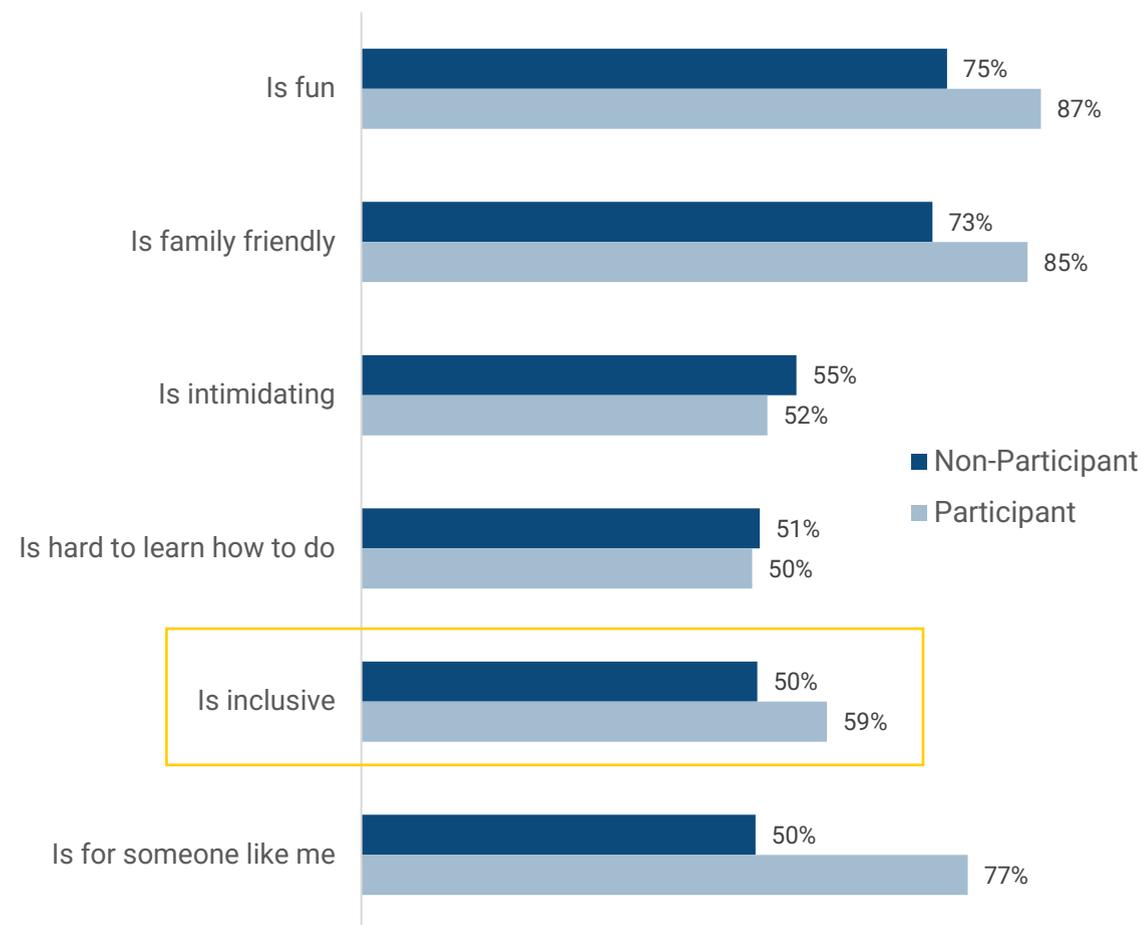


Boosting people of color that are already out there doing [snowsports]. I think social media helps a lot. It's so exciting and a big deal in that it kind of helps perpetuate the idea that anyone can be doing this. I think exposure is a big factor for sure.

- LGBTQ+ Participant

About half of non-participants agreed participating in snowsports is inclusive

Percentage Agreeing That Participating in Snowsports...



- About one in five disagreed that it was inclusive or for someone like them. Most of the remaining non-participants neither agreed nor disagreed with these two statements.
- Snowsports participants generally had more positive opinions about participating in snowsports – agreeing it was fun, family friendly, inclusive, and for someone like me at higher rates than non-participants.
- Lower income respondents (those making 30-50k household income) were less likely to agree that participating in snowsports was for someone like them (57%) or was inclusive (48%) than those with household incomes over 100k (72% and 63%).
- Male respondents were more likely than female respondents to agree that participating in snowsports was for someone like them (72% vs. 59%) and inclusive (60% vs. 52%).
- LGBTQ+ respondents were more likely to agree that participating in snowsports was inclusive (63%) than others (54%).

Interviewees understand the importance of inclusivity

- Current participants value inclusivity in snowsports. By actively promoting inclusivity, they believe more and more people will participate and that keeps snowsports thriving.
- Non-participants also highlight the relationship between inclusivity and participation, believing it will make more people attracted to snowsports. Non-participants themselves revealed that the more inclusive snowsports is to them, the more interested they would be to follow and try snowsports because they feel like they can also do it.

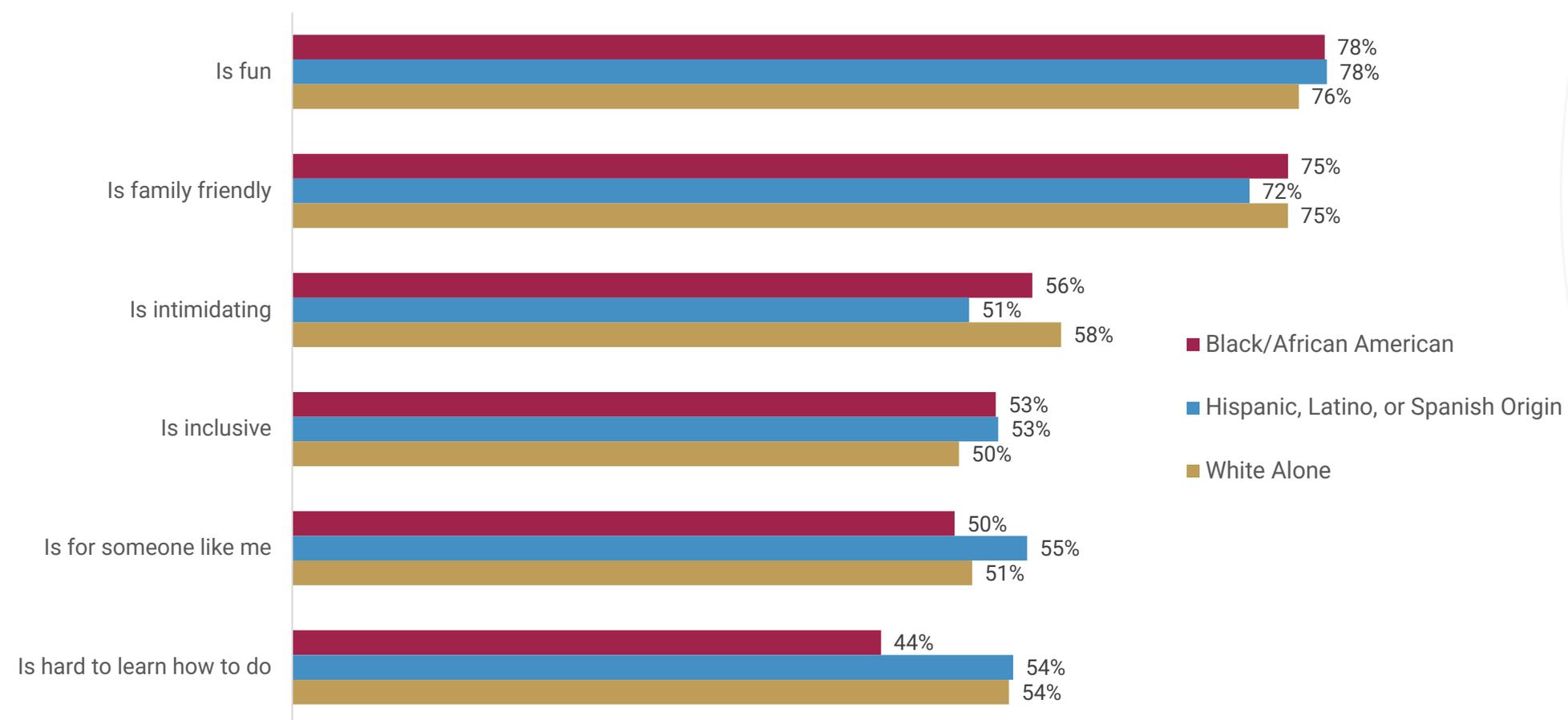


[If more inclusive] It would hopefully diversify the sports and get a wider audience of people to try and get out for the first time... I think it could just broaden the amount of people that are engaging in those sports and the type of people that are trying it.

- LGBTQ+ non-participant

Non-participants held similar opinions on snowsports across race/ethnicity

Percentage of Non-Participants Agreeing That Participating in Snowsports...



Outreach programs to young people were considered important

- Since many interviewees, especially current participants had been exposed to snowsports from a young age, they considered school to be the best time to experience snowsports.
- Prospective participants shared a similar view in that they wished that they had tried out snowsports when they were younger.
- Some participants had snowsports as extracurricular activity options in their schools and viewed this a great way to become involved in snowsports because many barriers were minimized.



You got to walk the walk. If you want to show people that this is something you're concerned about, this is something that you want everyone to feel included, and you want people to take up more winter sports, then you have to actively create programs and initiatives that will help remove those barriers, that will show that you're taking that first step of reaching out and extending your hand and taking that action, because people really respond to that.

- African American/Black participant

Interviewees wanted to see people like themselves represented in snowsports

- Interviewees, both current and prospective participants, wanted to see people of color in advertising for snowsports, in general, and, more specifically, in advertising for resorts.
- Social media, in particular, was considered an important tool to promote diverse athletes and encourage people of diverse backgrounds to establish a shared interest in snowsports.



Make more advertisements that are inclusive... [With] people of various ethnic backgrounds, people [who are] straight or gay... I think it would add a lot of value.

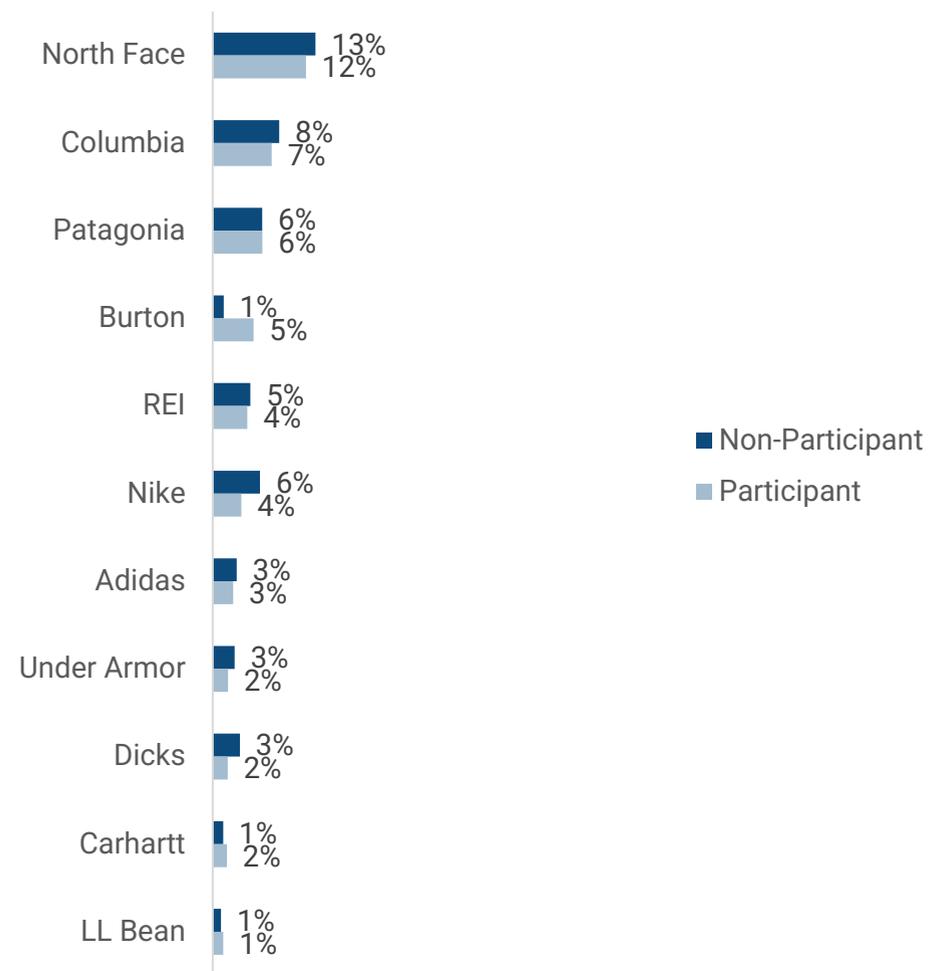
- LGBTQ+ non-participant



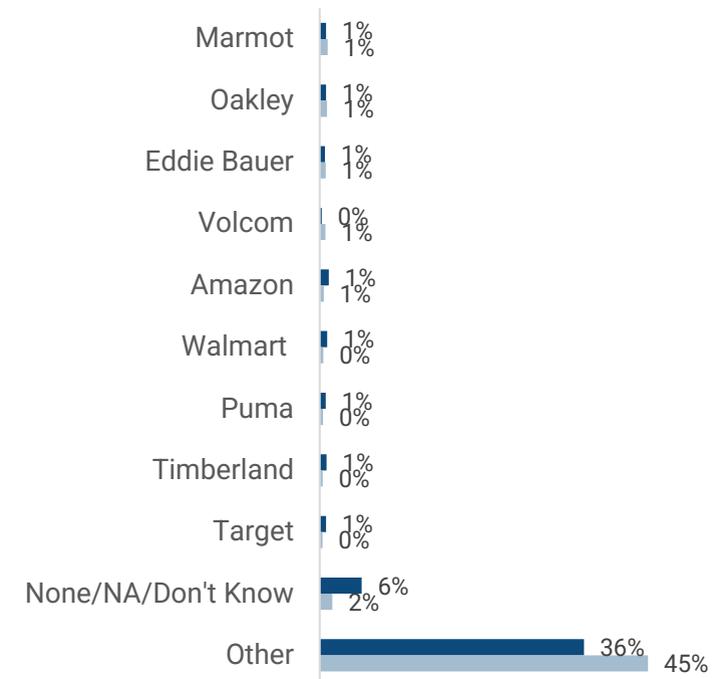
BRAND AWARENESS AND CONSUMER BEHAVIOR

North Face, Columbia, and Patagonia were the first brands that came to mind

First Outdoor Recreation Brand Identified

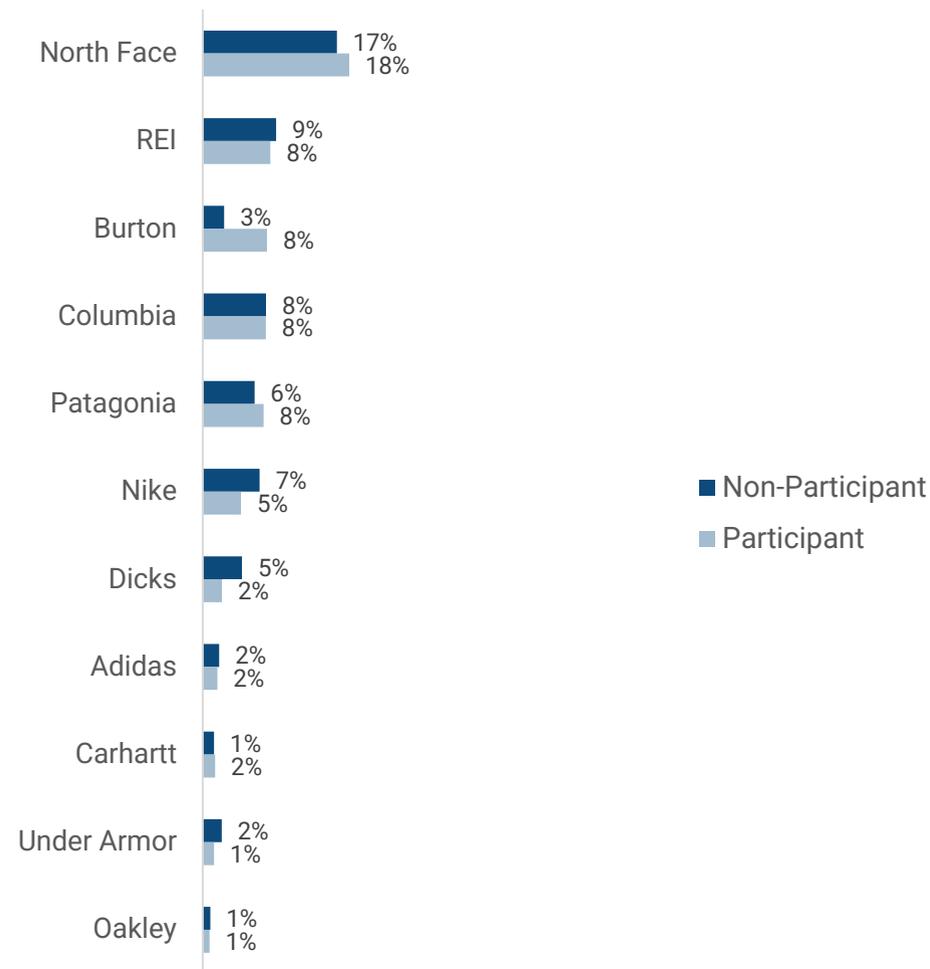


Respondents were asked: When thinking about outdoor brands that may sell clothing or equipment for those recreating outdoors in winter, which brands first come to mind? They were given spaces to write-in up to ten entries. The graphs on this slide present the percentage of respondents who listed the brand as the first brand they entered.

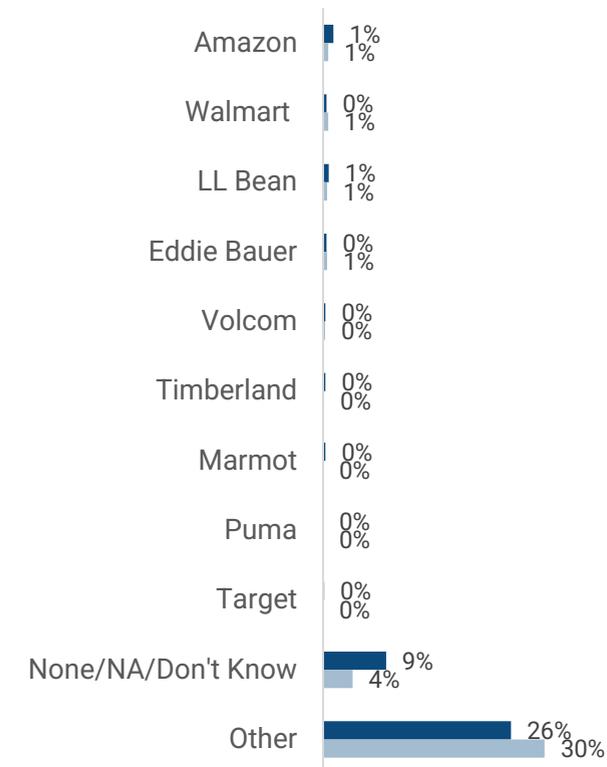


North Face was the most frequently mentioned brand

Percentage of All Brand Mentions

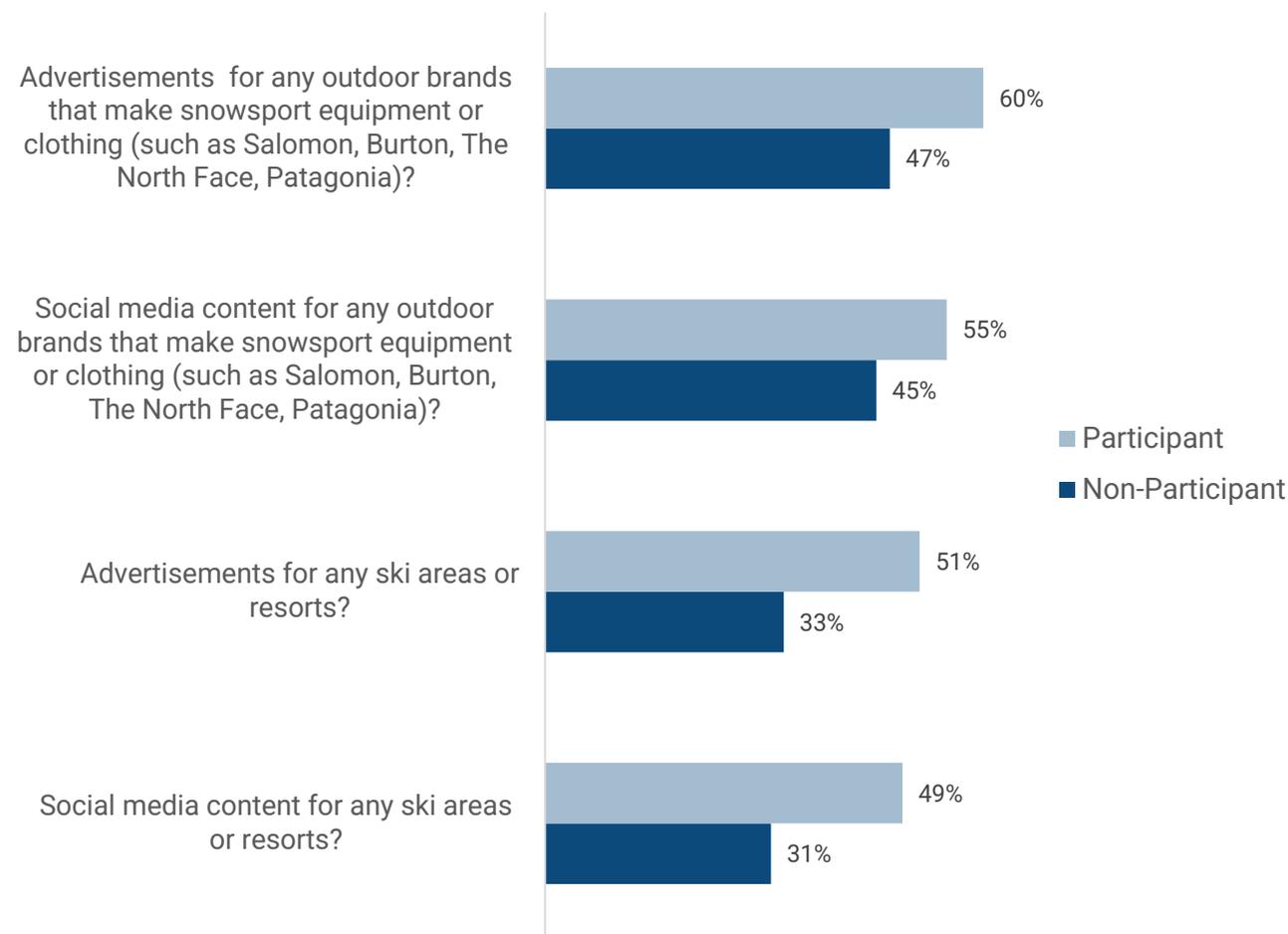


Respondents were asked: When thinking about outdoor brands that may sell clothing or equipment for those recreating outdoors in winter, which brands first come to mind? They were given spaces to write-in up to ten entries. The graphs on this slide present the percentage of respondents who mentioned the brand in any position in their list of entries.



Non-participants were less likely to have seen snowsports advertising

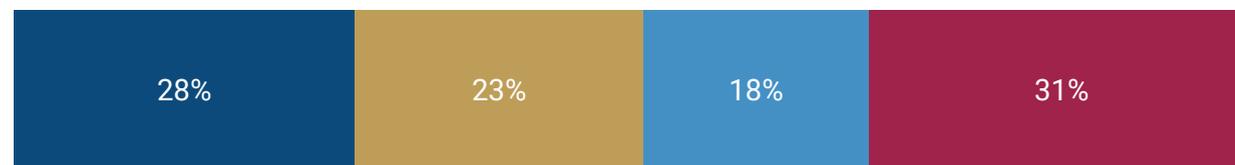
Percentage Having Seen Content in the Past Year



- Most participants said they had seen snowsports brand advertisements (60%), social media content from outdoor brands (55%), and advertisements for ski areas or resorts (51%). Nearly half (49%) recalled social media content for ski areas or resorts.
- Non-participants reported seeing all of these types of content at lower levels than participants, but the largest disparities came in advertisements or social media content for ski areas or resorts. It is important to note that we cannot tell from these data whether those who have participated are more likely to see and remember this content or whether those who see the content are more likely to participate.
- A higher share of Hispanic respondents said they saw social media content for any outdoor brands that make snowsports equipment or clothing (58%) than White alone respondents (51%).
- Alternatively, a higher share of White alone respondents (58%) said they saw advertisements for outdoor brands than non-Hispanic People of Color (46%).

Participants' most recent purchases were split between online and in-person transactions

Participants' Last Purchase for Snowsport Equipment or Clothing



- Online via a mass merchant such as Amazon
- Online via a specialty retailer such as Backcountry.com or REI.com
- In-person at a mass merchant such as Walmart or Target
- In-person at a specialty retailer such as REI or another local retailer specializing in outdoor equipment

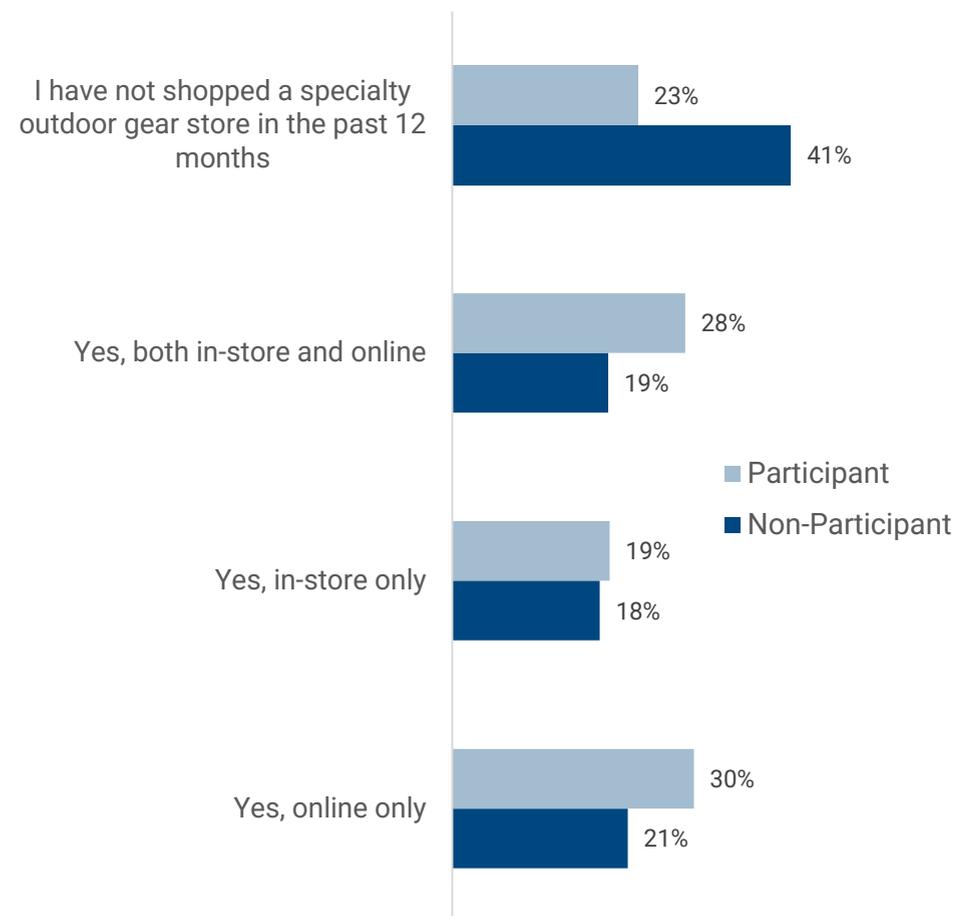
- Participants most commonly said their last purchase for snowsports equipment or clothing came from an in-person transaction at a specialty retailer (31%), but this was closely followed by purchases from an online mass merchant like Amazon (28%).
- Participants with household incomes above \$100,000 were more likely to have made their last purchase from an online specialty retailer (29%) and less likely from an in-person mass merchant (12%).

Participants' most recent purchase behavior was similar across race



Most respondents had shopped at an outdoor gear store in the past year

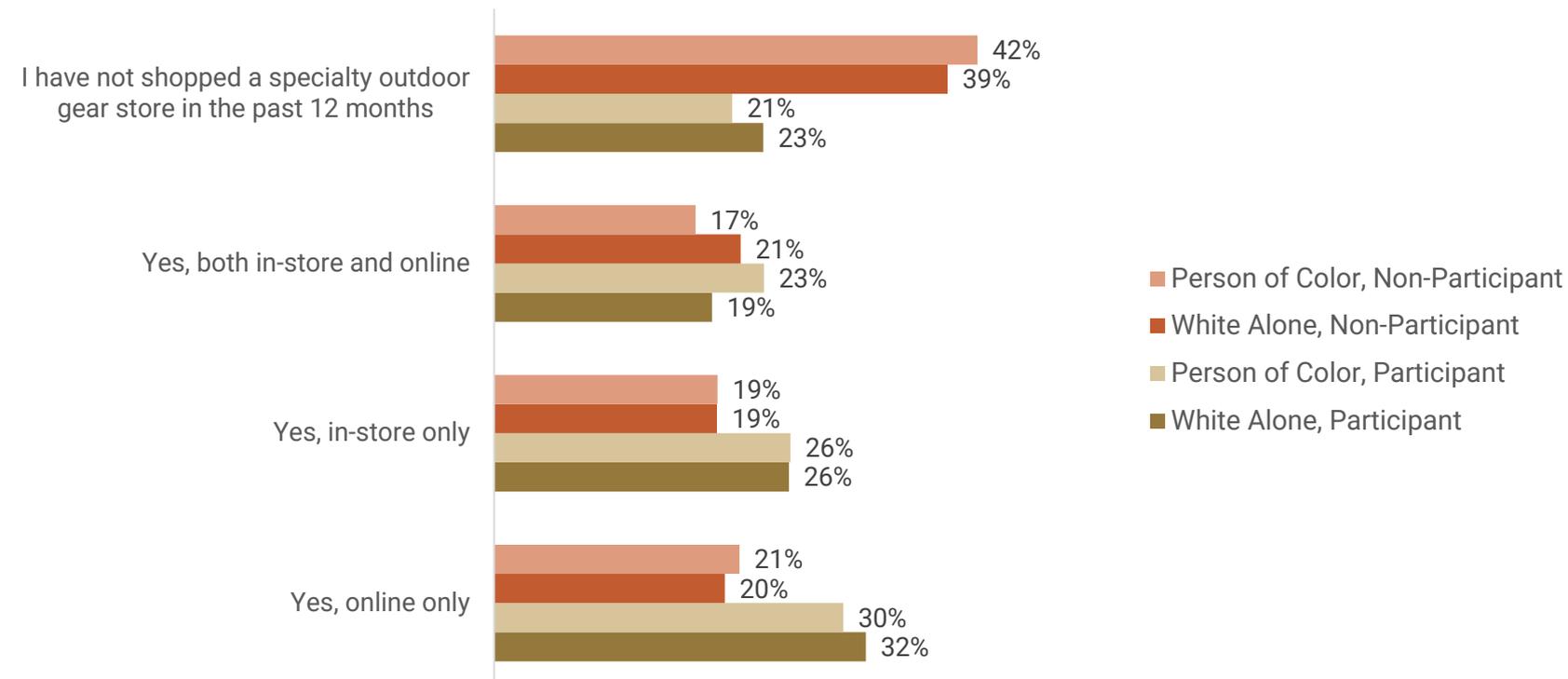
Shopped at an Outdoor Gear Store in Past 12 Months



- More than three out of four participants (77%) and a majority of non-participants (59%) had shopped at an outdoor gear store in the past 12 months.
- While non-participants were generally split between online and in-store shopping, participants had a slight preference for online shopping.
- Lower income respondents reported shopping at an outdoor gear store at a lower rate (58%) than those with household incomes over \$100,000 (78%).

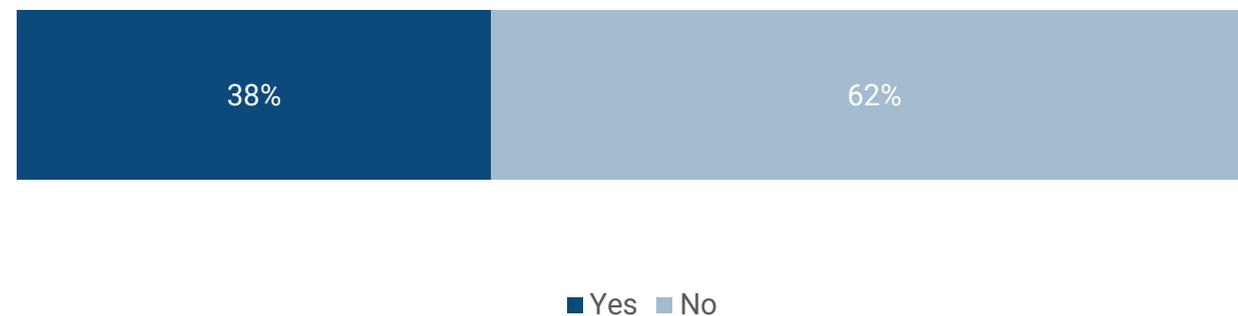
Outdoor gear shopping behaviors were similar across race/ethnicity

Shopped at an Outdoor Gear Store in Past 12 Months



More than a third of participants had a season pass

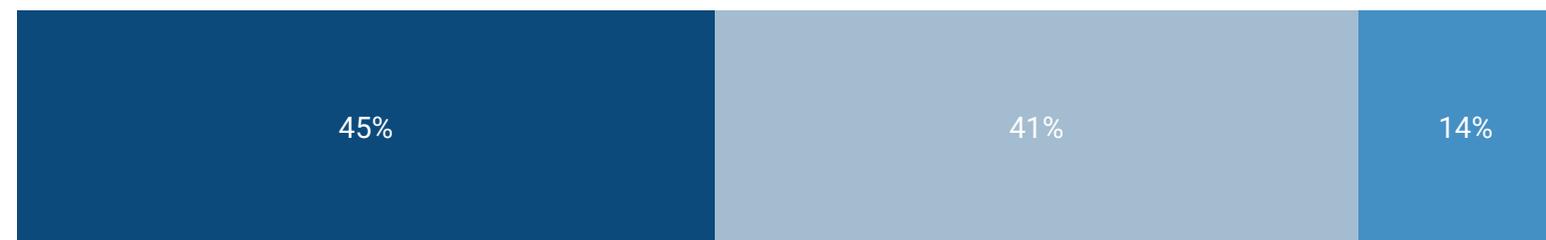
Did Participants (Who Had Skied or Snowboarded) Have a Season Pass Product at a Ski/Snowboard Area in Past Two Seasons?



- 38% of participants said they had a season pass product at a ski/snowboard area in the past two seasons.
- LGBTQ+ participants were more likely to say they had a pass (54%) than non-LGBTQ+ participants (35%).
- Male participants reported having a pass at a higher rate (45%) than female participants (33%).
- Urban participants reported having passes at a higher rate (52%) than their suburban (30%) or rural (29%) peers.
- The percentage of participants with ski/snowboard area passes was similar across race/ethnicity.

Most participants rented at least some equipment to participate in snowsports

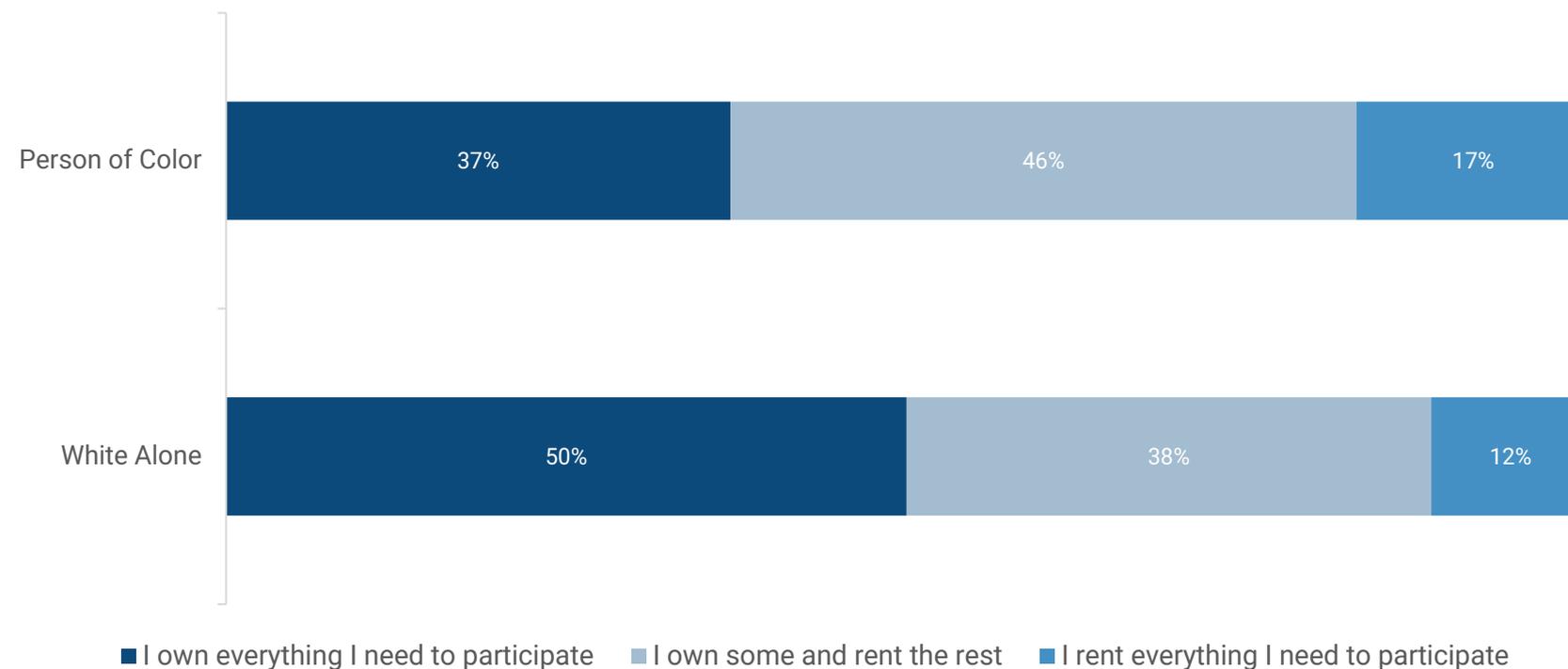
Participants' Equipment Status



■ I own everything I need to participate ■ I own some and rent the rest ■ I rent everything I need to participate

Participants of color were less likely to own all needed equipment

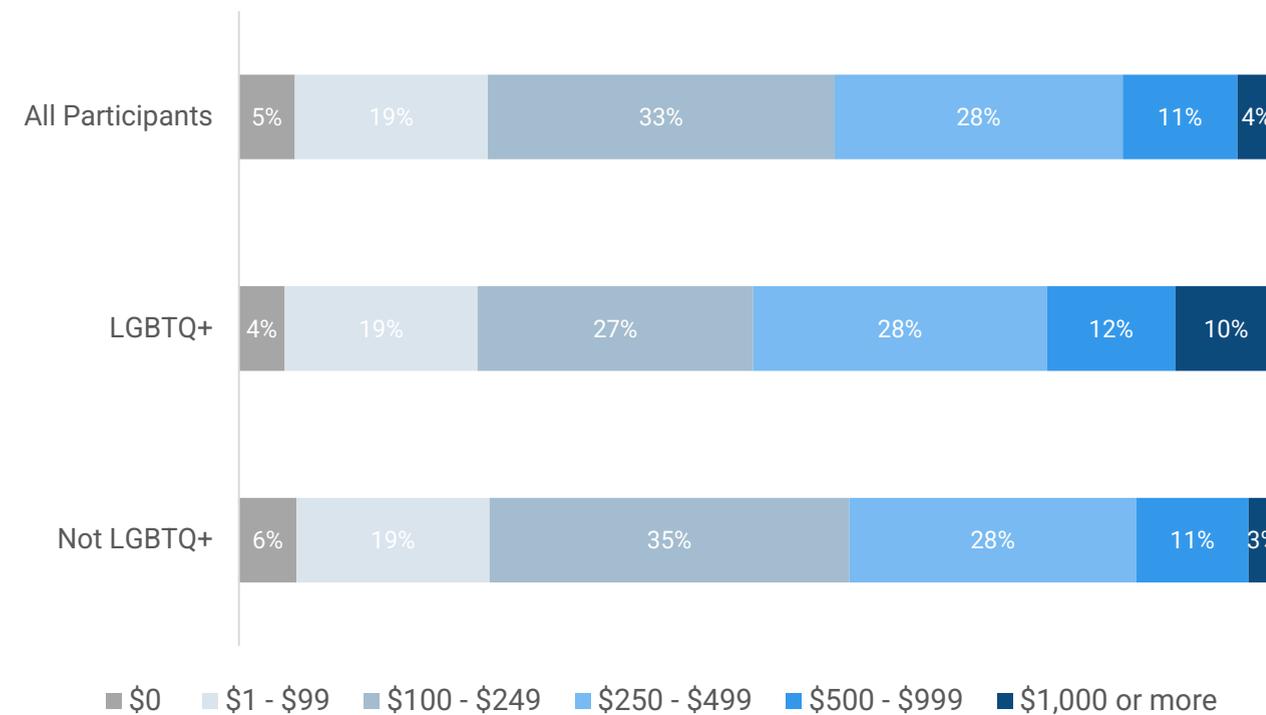
Participants' Equipment Status



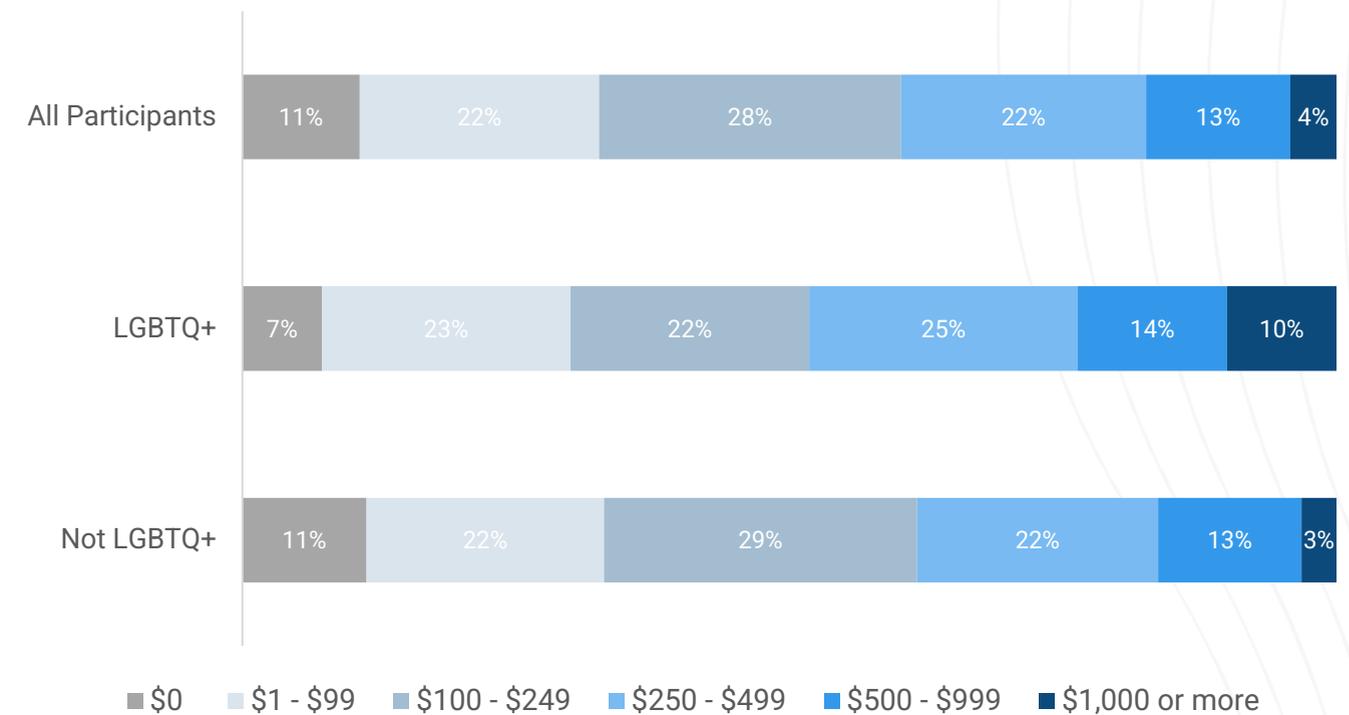
- White alone respondents were more likely to say they owned everything they needed to participate in snowsports (50%) than Black (34%) or Hispanic (39%) participants.
- Additionally, male participants were more likely to say they owned everything they needed (52%) than female participants (40%).

LGBTQ+ participants were more likely to spend \$1,000 or more on snowsport clothing and equipment

Amount Spent Per Year on Snowsport Clothing by Participants



Amount Spent Per Year on Snowsport Equipment by Participants





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APPENDIX



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RESEARCH METHODS

This research employed two methods, in-depth interviews and a survey.



IN-DEPTH INTERVIEWS

This first phase was designed to help us uncover barriers, perceptions, and attitudes. Learnings here informed the survey design.



SURVEY

This second phase helped us quantify key findings from the first phase in order to understand how prevalent the findings are in order to better prioritize potential recommendations.

Interview Methodology

MODE

- One-on-one interviews via online video chat.

PROFILE

- Interviewees were under age 35 and met some basic requirements regarding their proximity to a ski hill and activity level.
- Segments included African American, Hispanic/Latinx, Asian, and LGBTQ+.
- *Detailed profile information can be found on the next slide.*

DESIGN

- Corona Insights drafted the discussion guide with input from SIA staff and board.
- The length of interviews was approximately 45 minutes.
- All interviews were conducted in English.

NUMBER OF PARTICIPANTS

- There were 40 interviewees (10 per segment listed at left, split between snowsports participants and non-participants)

INCENTIVE

- The incentive was \$100.

TIME FRAME

- All interviews were conducted between August 16th and September 3rd 2021.

ANALYSIS

- Thematic coding was conducted to uncover overarching themes and themes within topics.

Survey Methodology

MODE

- Online survey (desktop and mobile friendly)

PROFILE

- Respondents had to be under age 45, have at least a minimal physical activity level, and be located within a day’s drive of snowsports participation, and have a household income of at least \$30,000.
- African American, Latinx, Asian, and LGBTQ+ respondents were specifically targeted in this research, though a sample of white participants and non-participants were also collected for a point of comparison.

RECRUITING

- Respondents came from multiple sample sources. The primary source was Dynata, an online panel company. The second source were several industry partners who agreed to distribute the survey. These included Vail Vets, Mount Noire, and AdventureTripr.

DESIGN

- Corona Insights drafted the survey instrument based on the interview findings and with input from SIA staff.
- The median time it took to complete the survey was 10 minutes.
- The survey was conducted in English.

SAMPLE SIZE

- In total, 1,447 surveys were completed and included in this analysis. This included: (a respondent could fall into more than one category)

| | Non-Participant | Participant |
|------------------------|-----------------|-------------|
| African American/Black | 147 | 91 |
| Hispanic/Latinx | 139 | 141 |
| Asian | 101 | 73 |
| White | 389 | 582 |
| LGBTQ+ | 114 | 114 |

Survey Methodology (con't)

INCENTIVE

- Participants via the panel were offered a small incentive in the panel's currency to participate.
- Participants via partners were offered a chance to win one of two prize packages, which included various outdoor gear (gloves, socks, ski poles, etc.).

TIME FRAME

- All surveys were collected during October and November 2021.

ANALYSIS

- Completed responses were screened for a series of data quality checks.
- Responses are presented as percentages of participants and non-participants.
- Open-ends were coded into categories when appropriate.

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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OUR RESEARCH PARTNER



Corona Insights, a Denver-based research, evaluation, and consulting firm, conducted the Next Gen research.



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