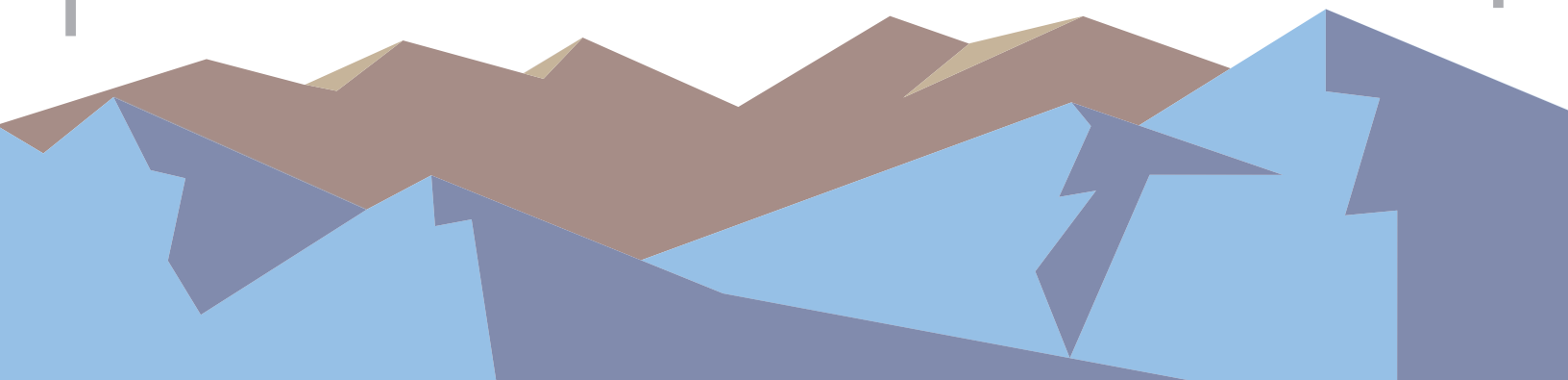




SNOW SPORTS PARTICIPATION INSIGHTS

A LOOK AT THE BEHAVIORS OF WINTER SPORTS
PARTICIPANTS ACROSS SKIING, SNOWBOARDING
AND CROSS-COUNTRY SKIING.



sia

Snowsports
Industries
America

TABLE OF CONTENTS

INTRODUCTION	1
SKI	2
SNOWBOARD	14
CROSS-COUNTRY	26
BACKCOUNTRY	38
CONCLUSION	39



INTRODUCTION

SNOWSPORTS INDUSTRIES AMERICA (SIA) IS THE NATIONAL NOT-FOR-PROFIT, MEMBER OWNED TRADE ASSOCIATION REPRESENTING THE WINTER SPORTS INDUSTRY. ESTABLISHED IN 1954, SIA'S MISSION IS TO HELP THE WINTER INDUSTRY THRIVE. SIA DELIVERS INVALUABLE SERVICES AND PROGRAMS TO ITS MEMBERS. FOR INFORMATION ON SIA MEMBERSHIPS VISIT [SNOWSPORTS.ORG](https://www.snowsports.org) FOR MORE INFORMATION.

AS A FOLLOW UP TO THE 2018 SIA PARTICIPATION REPORT, THIS STUDY TAKES A CLOSER LOOK AT THE BEHAVIORS OF WINTER SPORT PARTICIPANTS, SPECIFICALLY LOOKING AT WINTER SPORTS CONSUMERS' GENERAL MINDSET, RETAIL AND TRAVEL HABITS. BY USING THIS REPORT IN CONJUNCTION WITH THE SIA PARTICIPATION REPORT, THE GOAL IS TO PROVIDE GREATER INSIGHTS INTO PARTICIPANTS AND PARTICIPATION AS A WHOLE.

METHODOLOGY OVERVIEW

DURING EARLY 2019, A TOTAL OF 700 ONLINE INTERVIEWS WERE CARRIED OUT FROM THE U.S. ONLINE PANEL OF OVER ONE MILLION PEOPLE 18 YEARS OF AGE AND OVER OPERATED BY IPSOS. FROM THIS SAMPLE, 450 RESPONDENTS WERE RE-CONTACTED FROM THE ORIGINAL PAC STUDY WHO REPORTED PARTICIPATING IN ONE OF THE THREE SNOW SPORTS (ALPINE SKIING, CROSS COUNTRY/NORDIC SKIING, OR SNOWBOARDING (INCLUDING TOURING)) DURING THE 2017/2018 WINTER SEASON. THESE RESPONDENTS WERE ASKED MORE IN-DEPTH QUESTIONS ABOUT THEIR SNOW SPORT EXPERIENCE. AN ADDITIONAL 250 REPORTED NO INVOLVEMENT IN SNOW SPORTS DURING THE 2017/2018 WINTER SEASON. THESE PARTICIPANTS WERE ASKED QUESTIONS REGARDING INTEREST IN SNOW SPORTS AND PURCHASE BEHAVIORS.

TO ENSURE A BALANCE SAMPLE, QUOTAS WERE PUT IN PLACE FOR GENDER, AGE, AND ETHNICITY BASED ON THE TOTAL SNOW SPORT RESPONDENTS FROM THE ORIGINAL PAC SURVEY. PARTICIPANTS SURVEYED WERE AGED 18 AND OVER.

SKI





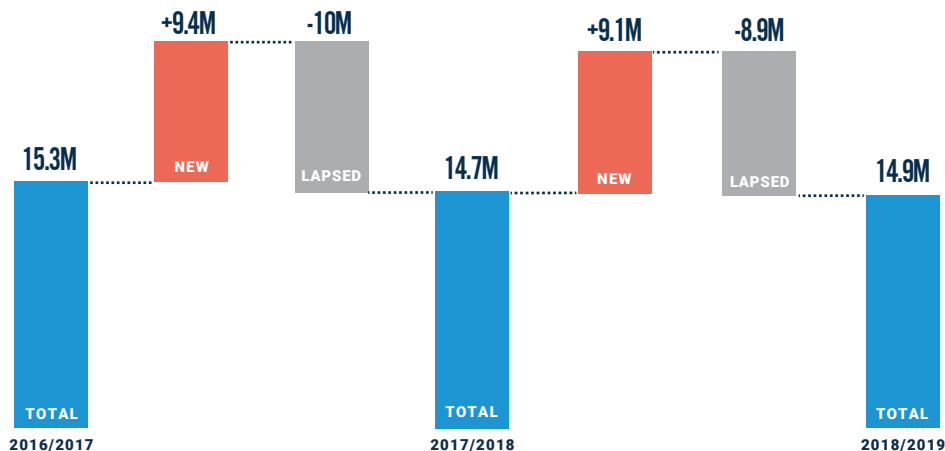
DEMOGRAPHICS

US POPULATION

Note: The following information is from the 2018 and 2019 Snow Sports Participation Report. Note also, the 2017/2018 New/Returning and Lapsed data has been updated since the publication of the 2018 Snow Sports Participation Report.



THE TOTAL NUMBER OF SKIERS 6 YEARS OF AGE AND OLDER WAS **14.7M** IN 2017-18 AND **14.9M** IN 2018-19. THIS IS A **+1.1%** CHANGE SEASON OVER SEASON.



AT THE END OF 2016/2017 THERE WERE **15.3M** SKIERS.

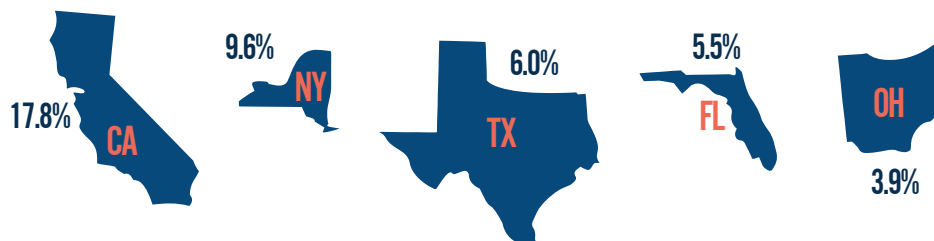
DURING THE 2017/18 SEASON **3.3M** STARTED/RETURNED, WHILE **-3.8M** LAPSED. THE SEASON ENDED WITH **14.7M** SKIERS.

DURING THE 2018/19 SEASON **9.1M** STARTED/RETURNED, WHILE **-8.9M** LAPSED. THE SEASON ENDED WITH **14.9M** SKIERS.



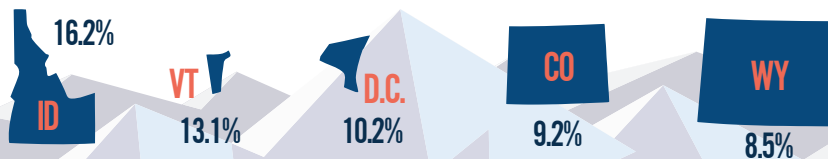
THE AVERAGE NUMBER OF DAYS OF SKIING WAS **7.4** FOR BOTH 2017/2018 AND 2018/2019.

IN 2018/2019, THESE STATES CONTRIBUTED THE GREATEST PROPORTION OF SKIERS TO THE TOTAL **14.9M** SKIERS IN THE US.



NOTE THAT PA, CO AND MI ARE ALL AT **3.8%**.

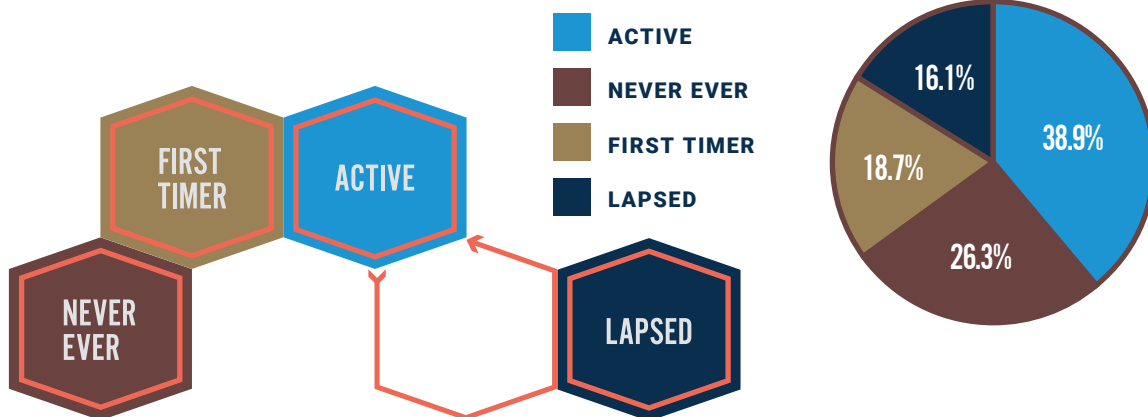
THESE STATES HAD THE GREATEST PROPORTION OF SKIERS RELATIVE TO THEIR POPULATION.



IN 2018/2019, THE TOTAL RETAIL MARKET FOR APLINE SKIS, BOOTS, BINDINGS AND POLES WAS **\$670M** AND **2.7M** UNITS. IN 2017/2018 THE IT WAS **\$640M** AND **2.7M** UNITS AS WELL.

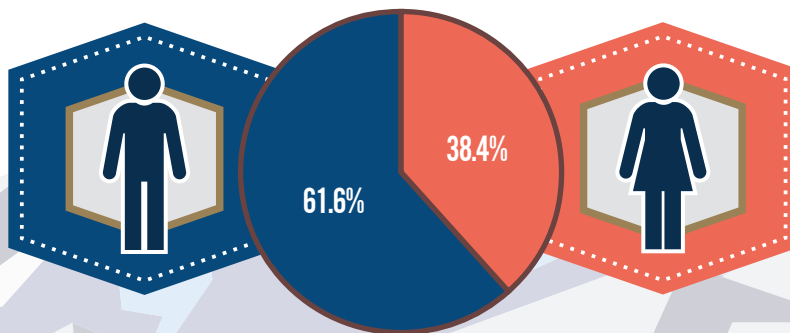
¹Source: The NPD Group Inc., US Snow Industry Retail Market Report (March, 2018, March 2019)

Note: The following information is based on this study which includes 700 online interviewees aged 18 and above. 450 of those took part in at least one winter sport whereas 250 did not.

LIFECYCLE


THE FOLLOWING ARE THE STAGES OF THE PARTICIPATION LIFECYCLE

-  **Never Participated** – individuals who have never participated
-  **First-timers** – individuals who participated for the first time in 2017-2018
-  **Active Participants** – individuals who participated 2017-2018 and it was not their first time
-  **Lapsed** – individuals who previously participated, but took 2017-2018 off

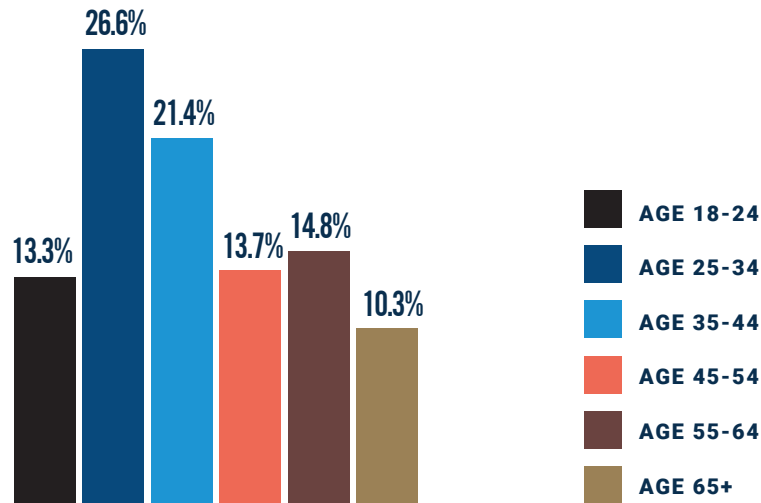
GENDER




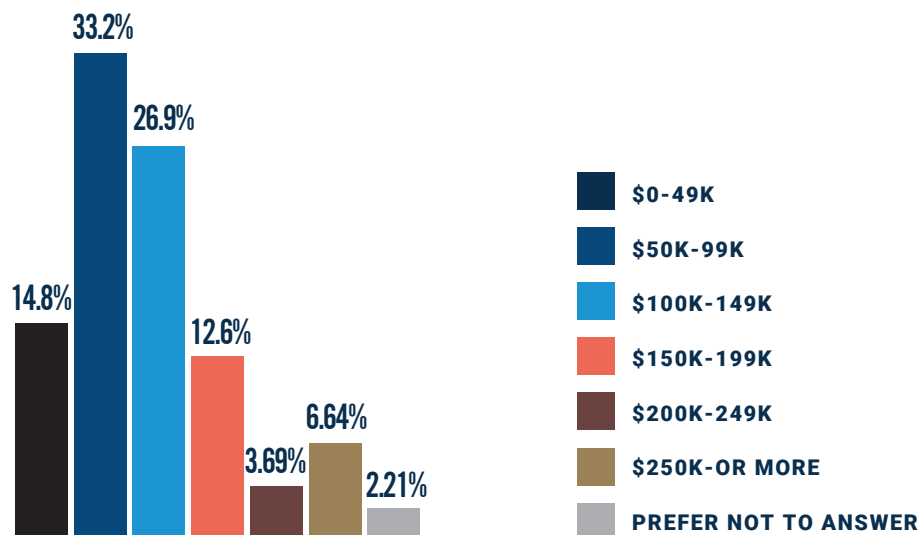
DEMOGRAPHICS

SKIERS IN THIS STUDY

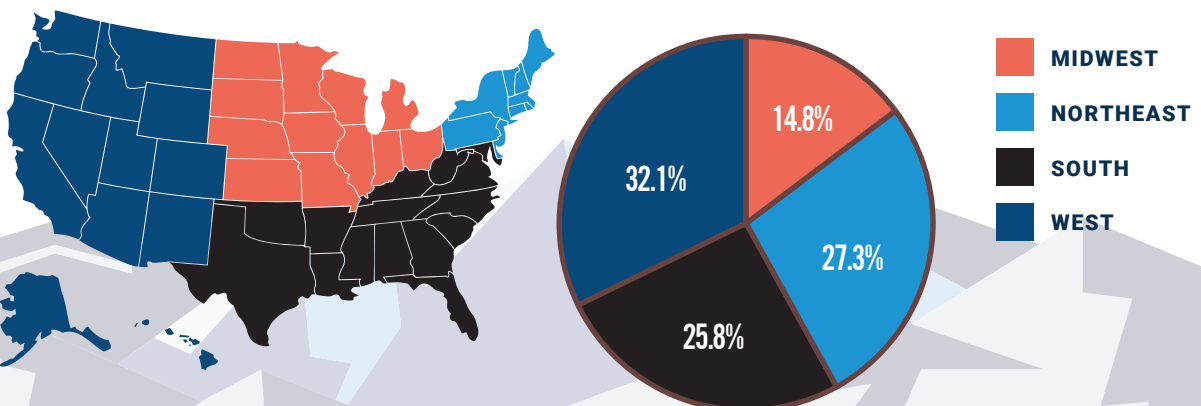
AGE



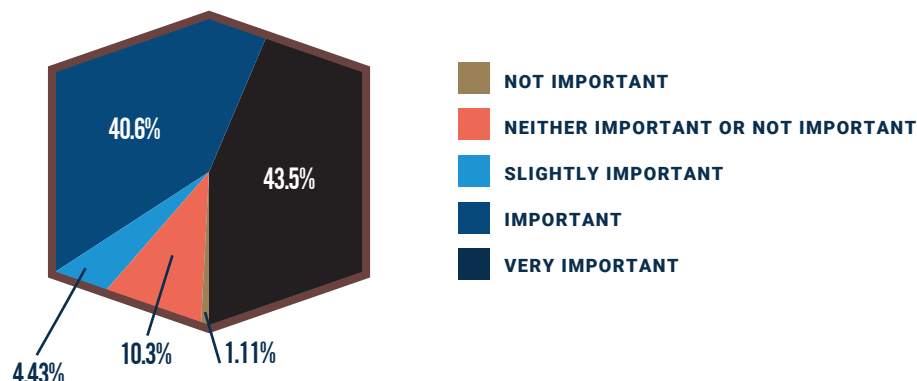
INCOME RANGE



GEOGRAPHY



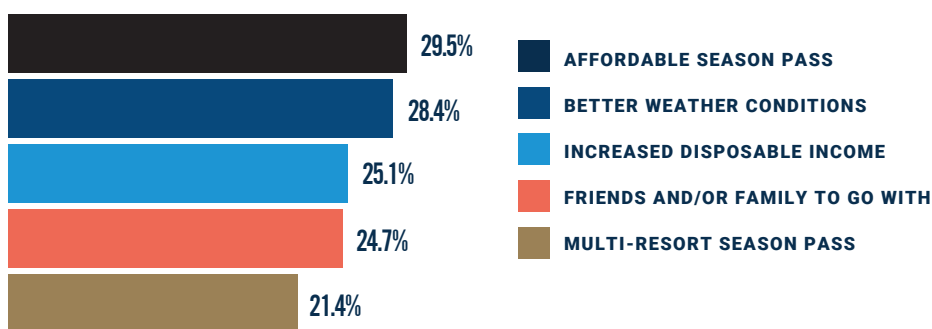
1. HOW IMPORTANT ARE SNOW SPORTS TO YOU?



84.1% of these skiers indicated that snow sports were either "important" or "very important" to them.

The percentage of first-time skiers is 48.3%.

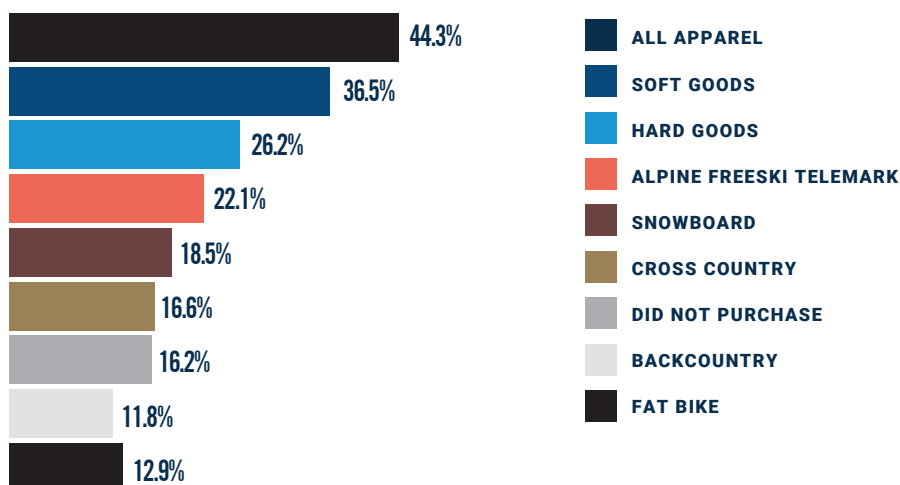
2. WHAT WOULD HELP TO INCREASE YOUR PARTICIPATION IN SKIING?



For first-time skiers, "having a flexible lift ticket product" (18.3%) and "feeling welcome in the activity" (15.3%) were also important.

The top factor to increase participation for first-time skiers is "better weather conditions". The top factor for engaged skiers is "affordable season pass".

3. DID YOU PURCHASE ITEMS IN ANY OF THE FOLLOWING SNOW SPORT EQUIPMENT OR WINTER APPAREL CATEGORIES DURING SEPTEMBER '17 TO AUGUST '18?

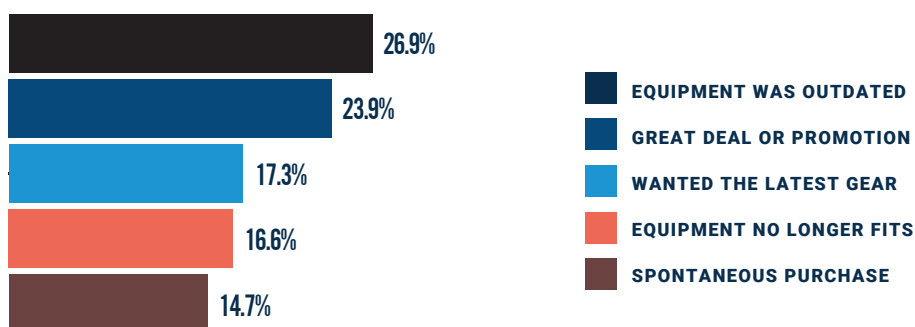


7.6% of first time-skiers “did not make any snow sports gear purchases” as compared to engaged skiers (24.3%).

31.3% of first-time skiers purchased “hard goods” compared to engaged skiers (21.4%).

37.4% of first-timer skiers purchased “apparel” as compared to 50.7% of engaged skiers who did.

4. WHAT WERE YOUR REASONS FOR MAKING THESE PURCHASES DURING SEPTEMBER '17 TO AUGUST '18?



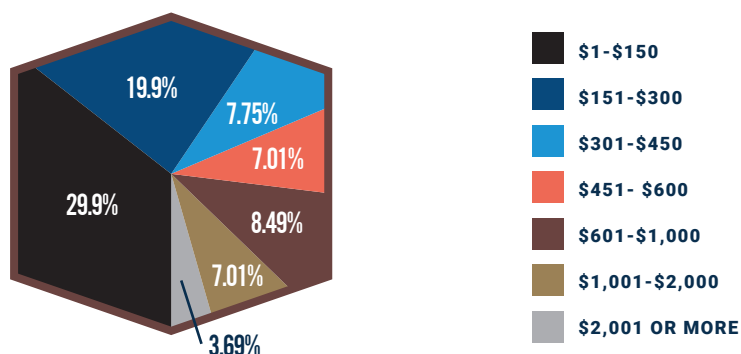
For first-time skiers one of the top reasons for purchasing includes “family/friend recommendation” (22.1%).

For engaged skiers, “family/friend recommendations” are not as important (5%).

16% of first-timers stated “marketing/advertising” as a reason for purchase as compared to engaged skiers (5%).

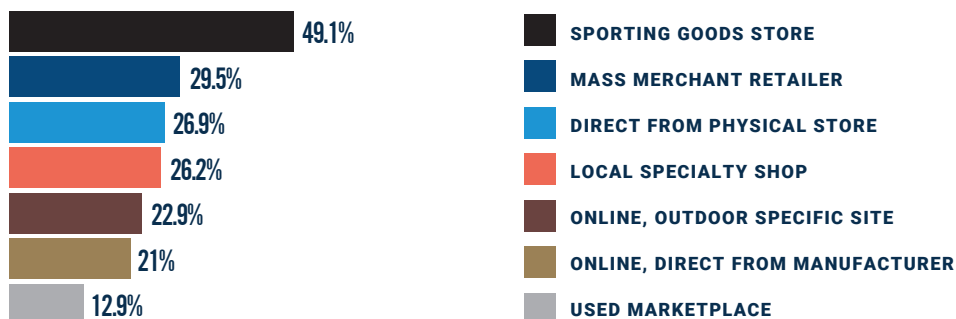
Engaged skiers are more interested in “great deals/promotions” (27.9%) as compared to first-timers (19.9%)

5. APPROXIMATELY HOW MUCH DO YOU THINK YOU SPENT ON SNOW SPORT EQUIPMENT/ACCESSORIES DURING SEPTEMBER '17 TO AUGUST '18 (LAST SEASON)?



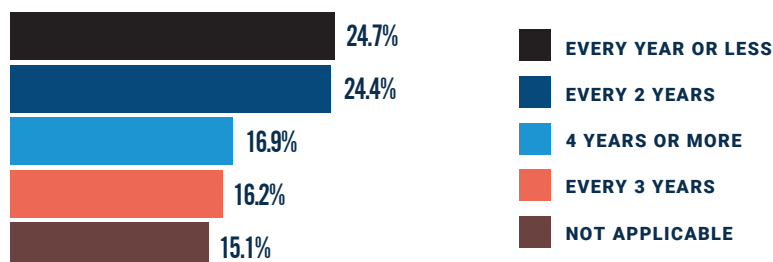
More first-time skiers (57%) have lower budgets -i.e. \$300 or less – as compared to engaged skiers (42%). As budgets go above \$1,000 there are fewer first-time skiers (9.9%) as compared to engaged skiers (11.3%).

6. WHERE DO YOU TYPICALLY PURCHASE YOUR SNOW SPORT EQUIPMENT/CLOTHING?

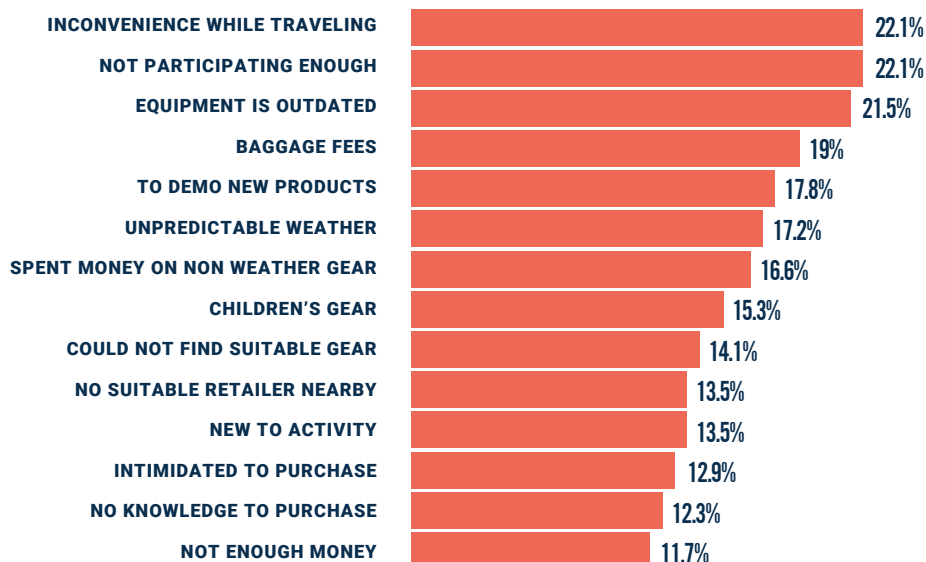


12.9% of skiers purchased from the “used marketplace” and 22.9% purchased from “outdoor-specific specialty sites.”

7. HOW FREQUENTLY DO YOU PURCHASE ALPINE EQUIPMENT?

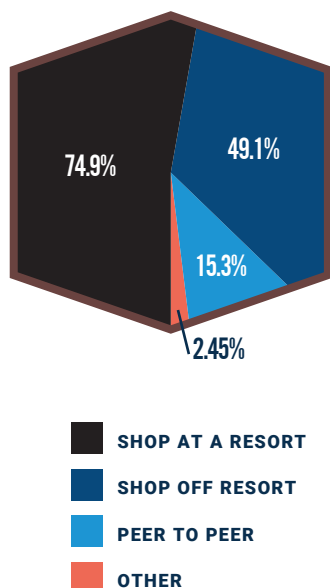


8. WHAT ARE YOUR REASONS FOR RENTING ALPINE EQUIPMENT?

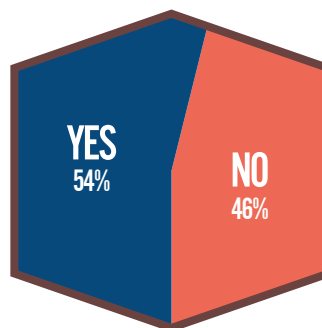


The main reason first-time skiers rent is, "due to inconvenience of carrying gear while traveling" (25%). For engaged skiers, the main reason is that they are "not participating enough" (27%).

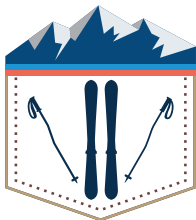
9. WHERE DO YOU RENT YOUR EQUIPMENT?



9a. DO YOU RENT EQUIPMENT FOR THE FULL SEASON?



For first-time skiers who rent, 71.2% do a "full-season rental" which is quite different from engaged skiers (23.7%).

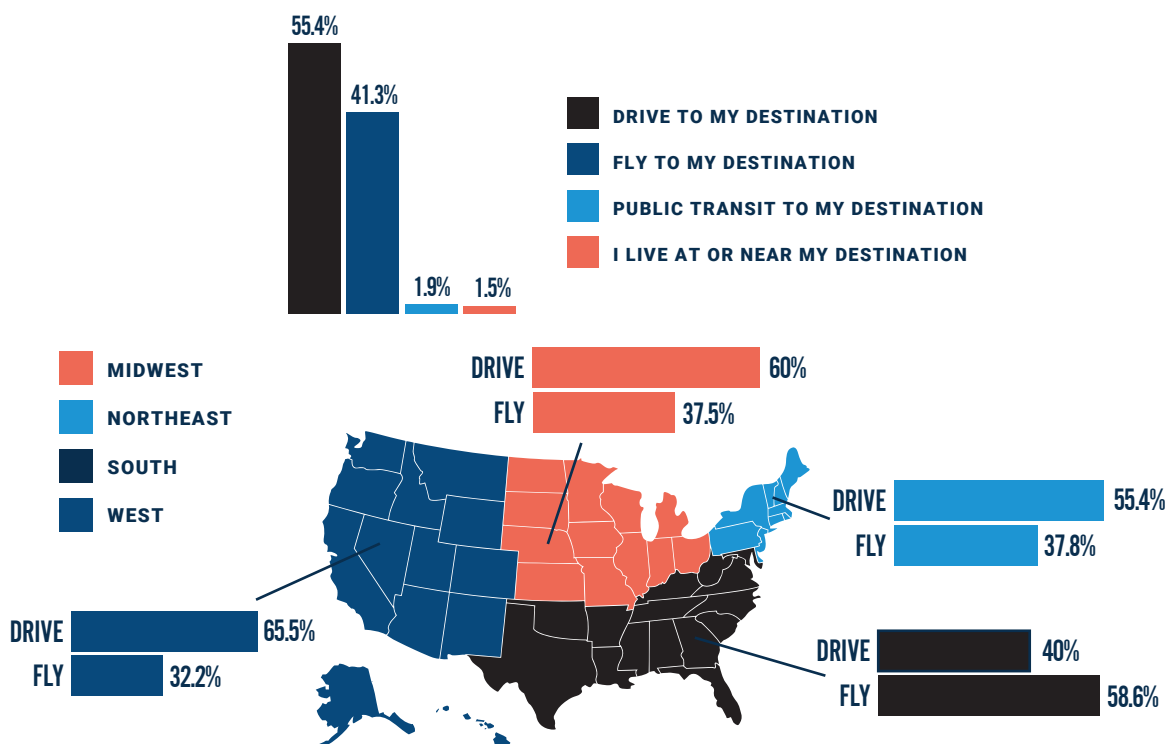


10. OVER THE LAST THREE SEASONS (2015 TO 2018), HOW WOULD YOU IDENTIFY YOUR SKI TRIPS INCLUDING DAY TRIPS AND VACATIONS?

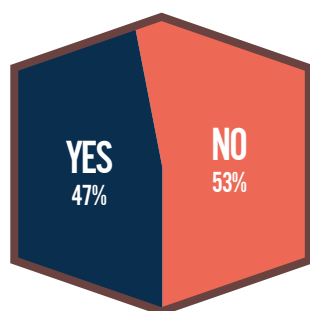
For “engaged” skiers, 32.1% had “no change” in their frequency nor their length of trips, 10% were taking “more, shorter trips”, 9.3% were taking “more, longer trips”, 12.9% were taking “fewer, shorter trips”, 13.6% were taking the “same number of trips, but shorter”, 9.3% were taking the “same number of trips, but longer”, 5.7% were taking “fewer trips, but longer” and 7.1% were “unpredictable” regarding their trips.

11. WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU GET TO YOUR SKI DESTINATION THE MOST OFTEN?

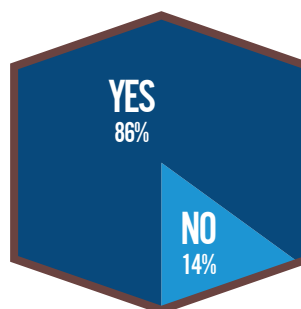
As skiers get to their destinations, 55.4% of them drive. 41.3% of them fly, 1.9% of them take public transit and 1.5% of them walk (i.e. live at/nearby)



12. DO YOU USUALLY PURCHASE A MULTI-RESORT SEASON PASS?



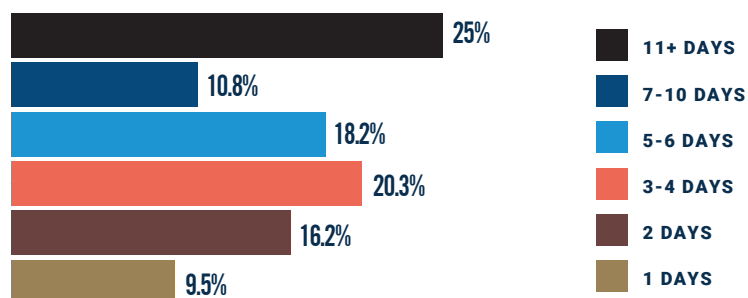
12a. IF YES, DO YOU USE YOUR MULTI-RESORT SEASON PASS AT DIFFERENT RESORTS?





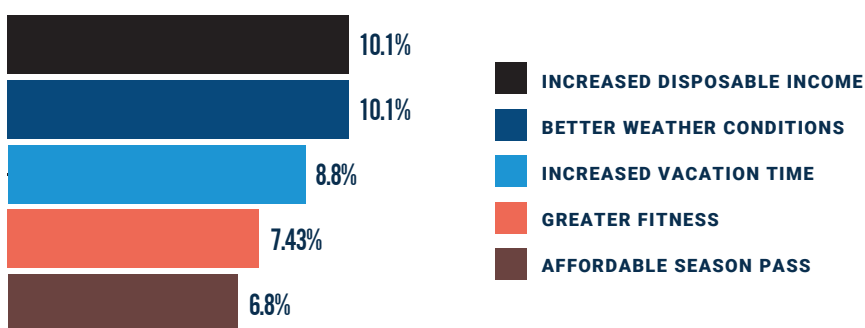
Day-trippers are those skiers who travel to their destinations and *return home* later in the day.

13. HOW MANY DAY TRIPS DO YOU TYPICALLY TAKE DURING A WINTER SEASON TO SKI?



Considering day trip frequency by age we see that *67.9%* of 45 - 54-year-olds went on five or more day-trips, followed by 35 - 44-year-olds at *57.1%*. Tied at *50%* were 18 - 24-year-olds and 25 - 34-year-olds. Next we have *48.2%* of 55 - 64-year-olds and *47.4%* of 65+ year-olds going on five or more day-trips.

14. WHAT ARE THE MAIN REASONS YOU ARE TAKING MORE TRIPS?

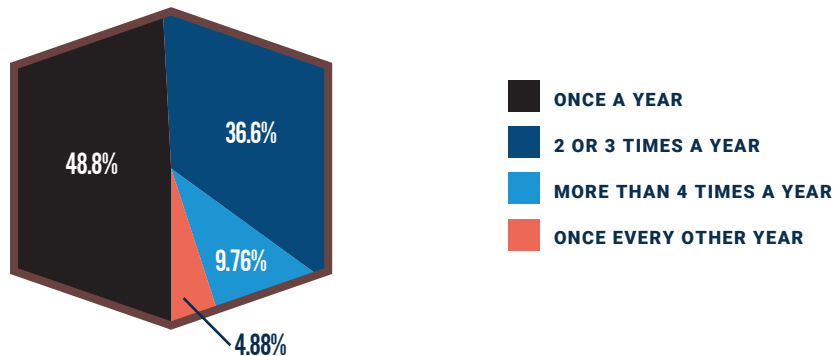


The *top reasons for first-timer skiers* are: increased disposable income, better weather, availability of other activities and lower costs for gear and lift tickets. By comparison, the *top reasons for engaged skiers* are: increased vacation time, better weather, greater fitness, and friends and family to go with.

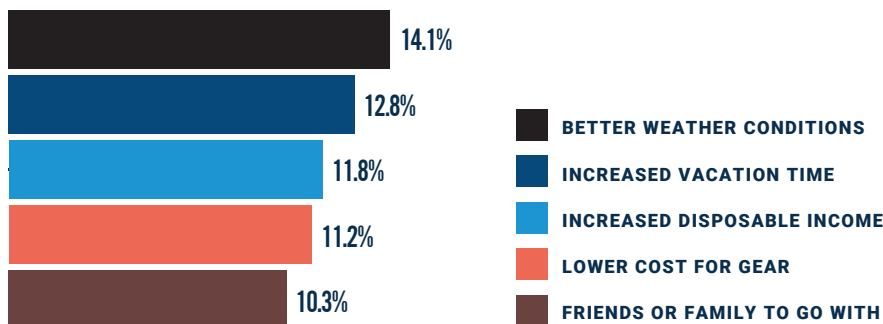


Vacationers are those skiers who travel to their destinations and stay over at least *one night*.

15. IN THE LAST FIVE YEARS, HOW OFTEN HAVE YOU TAKEN A VACATION TO FOCUS ON ONE OR MORE SNOW SPORTS SUCH AS SKIING, SNOWBOARDING, CROSS-COUNTRY SKIING, ETC.?

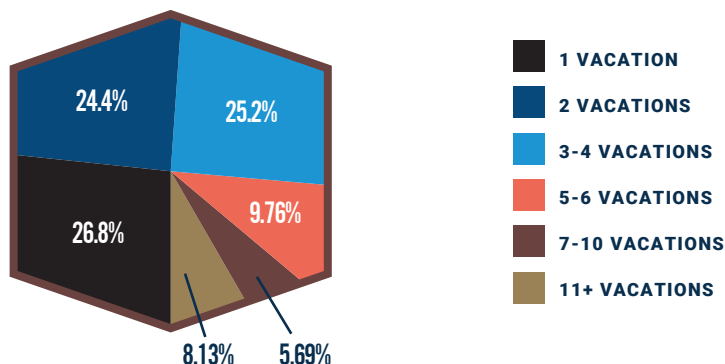


16. WHAT ARE THE MAIN REASONS YOU ARE TAKING MORE TRIPS?

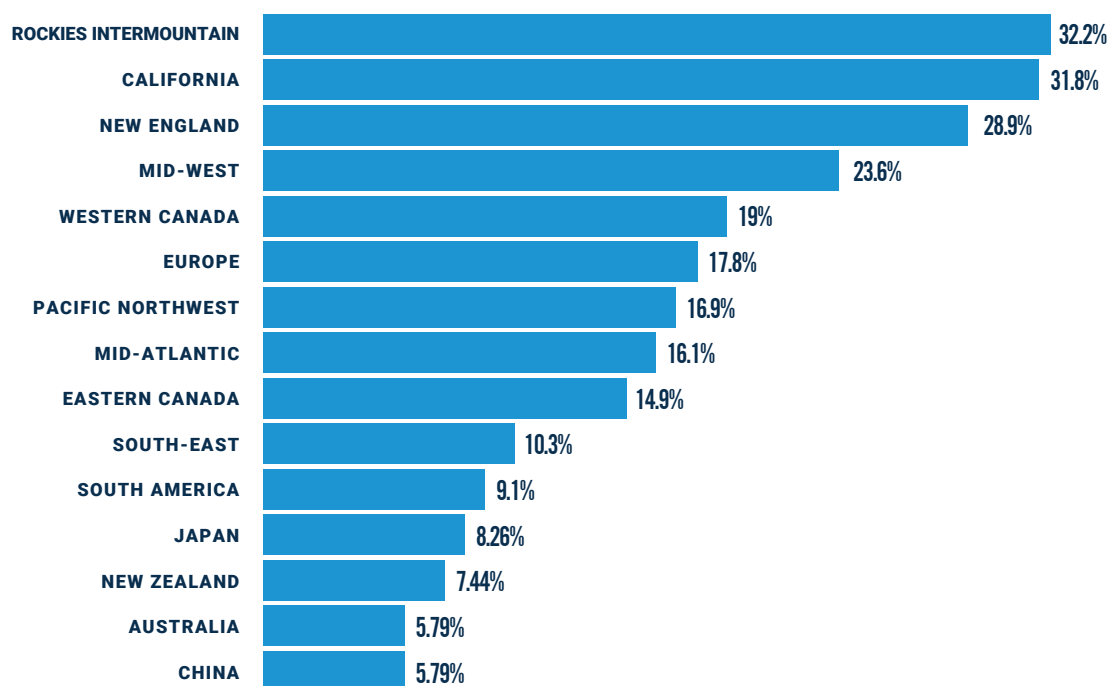


The *top reasons for first-time skiers* are: better weather conditions, lower costs for gear and lift tickets, feeling welcome in the activity and availability of other activities. By comparison, the *top reasons for engaged skiers* are: increased vacation time, friends and family to go with, increased disposable income, better weather conditions and greater fitness.

17. HOW MANY DRIVING VACATIONS DO YOU TYPICALLY TAKE DURING A WINTER SEASON TO PARTICIPATE IN SKIING? VACATIONS MEAN YOU STAYED AT LEAST ONE NIGHT AT YOUR DESTINATION.



For first-time skiers, 27.1% went (5) or more times. For engaged skiers, it was 21.3%.

**18. WHICH REGION[S] HAVE YOU TRAVELED TO FOR YOUR SKI VACATION IN THE LAST FIVE YEARS?**

SNOWBOARD





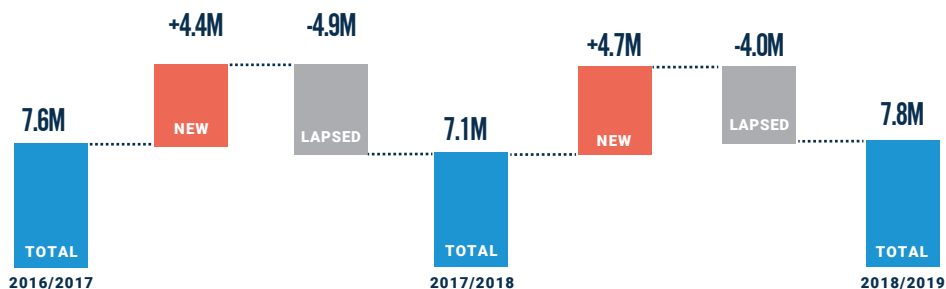
DEMOGRAPHICS

US POPULATION

Note: The following information is from the 2018 and 2019 Snow Sports Participation Report. Note also, the 2017/2018 New/Returning and Lapsed data has been updated since the publication of the 2018 Snow Sports Participation Report.



THE TOTAL NUMBER OF SNOWBOARDERS 6 YEARS OF AGE AND OLDER WAS **7.1M** IN 2017-18 AND **7.9M** IN 2018-19. THIS IS A **+9.4%** CHANGE SEASON OVER SEASON.



AT THE END OF 2016/2017 THERE WERE **7.6M** SNOWBOARDERS.

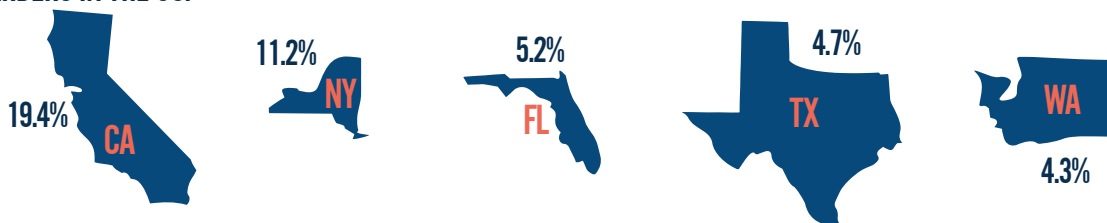
DURING THE 2017/18 SEASON **3.2M** STARTED/RETURNED, WHILE **-3.6M** LAPSED. THE SEASON ENDED WITH **7.1M** SNOWBOARDERS.

DURING THE 2018/19 SEASON **+4.7M** STARTED/RETURNED, WHILE **-4.0M** LAPSED. THE SEASON ENDED WITH **7.8M** SNOWBOARDERS.

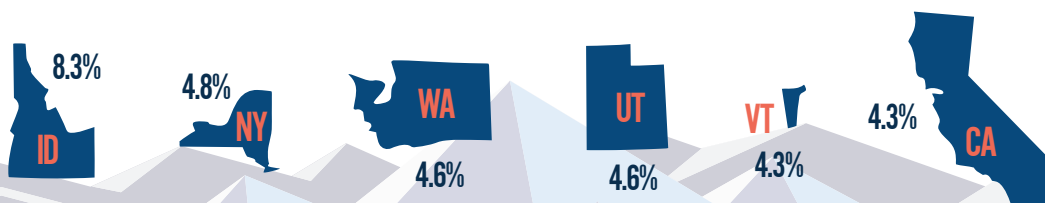


THE AVERAGE NUMBER OF DAYS OF SNOWBOARDING WAS **7.7** IN 2017/2018 AND **7.8** IN 2018/2019.

IN 2018/2019, THESE STATES CONTRIBUTED THE GREATEST PROPORTION OF SNOWBOARDERS TO THE TOTAL **14.9M** SNOWBOARDERS IN THE US.



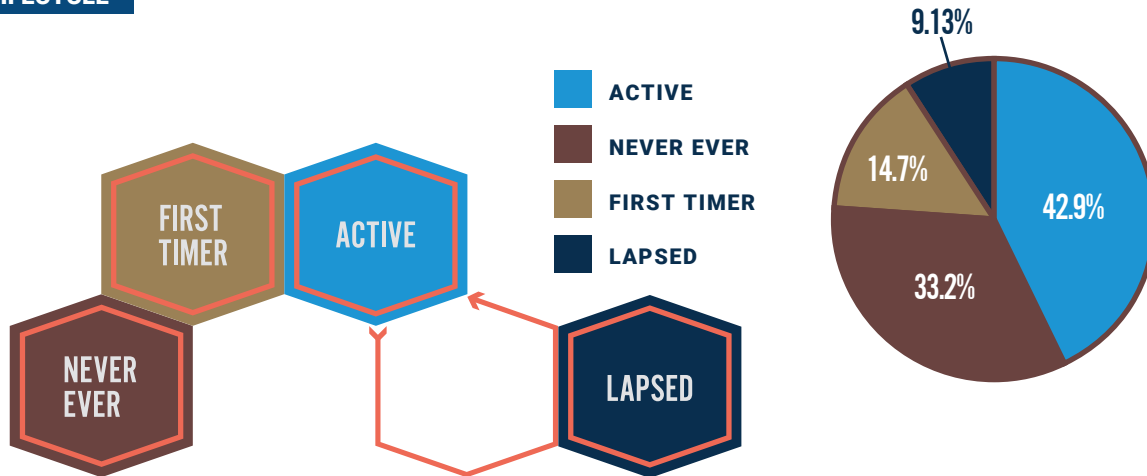
THESE STATES HAD THE GREATEST PROPORTION OF SNOWBOARDERS RELATIVE TO THEIR POPULATION.



IN 2018/2019, THE TOTAL RETAIL MARKET FOR SNOWBOARDS, BOOTS, AND BINDINGS WAS **\$377M** AND **1.6M** UNITS. IN 2017/2018 THE IT WAS **\$334M** AND **1.4M** UNITS.

¹Source: The NPD Group Inc., US Snow Industry Retail Market Report (March, 2018, March 2019)

The following information is based on this study which includes 700 online interviewees aged 18 and above. 450 of those took part in at least one winter sport whereas 250 did not.

LIFECYCLE


THE FOLLOWING ARE THE STAGES OF THE PARTICIPATION LIFECYCLE



Never Participated – individuals who have never participated



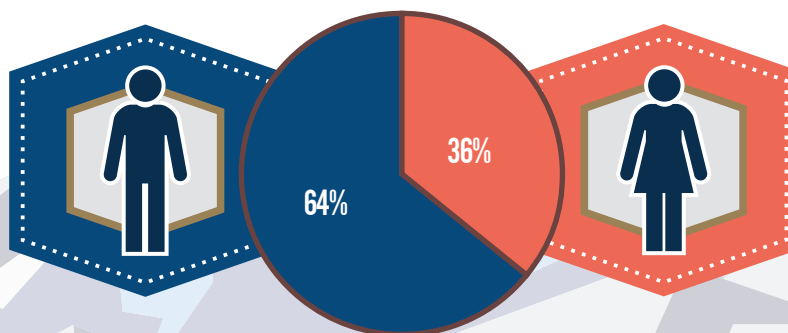
First-timers – individuals who participated for the first time in 2017-2018



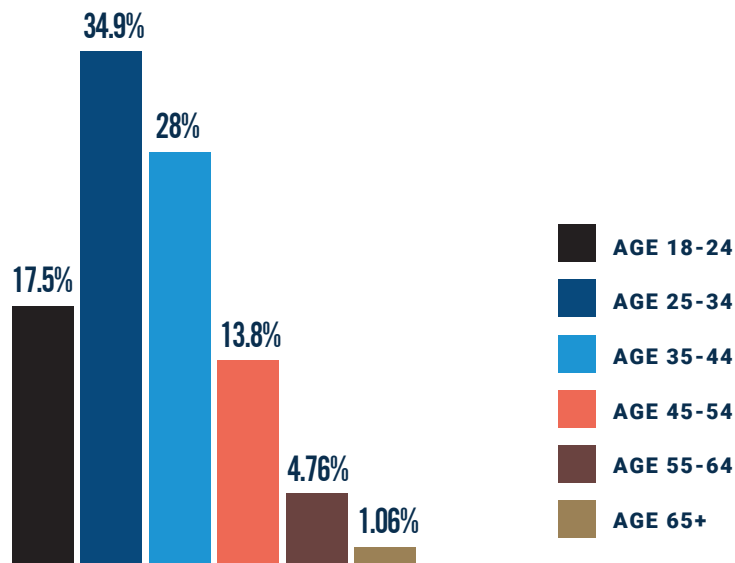
Active Participants – individuals who participated 2017-2018 and it was not their first time



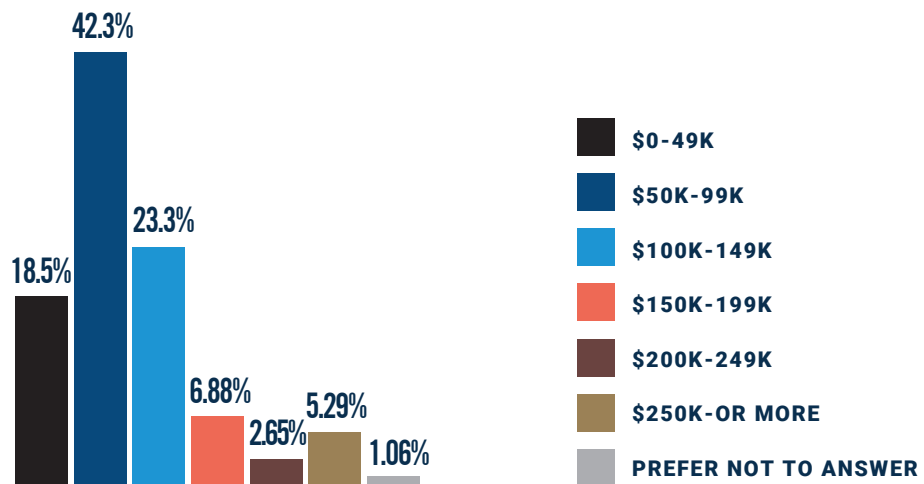
Lapsed – individuals who previously participated, but took 2017-2018 off

GENDER


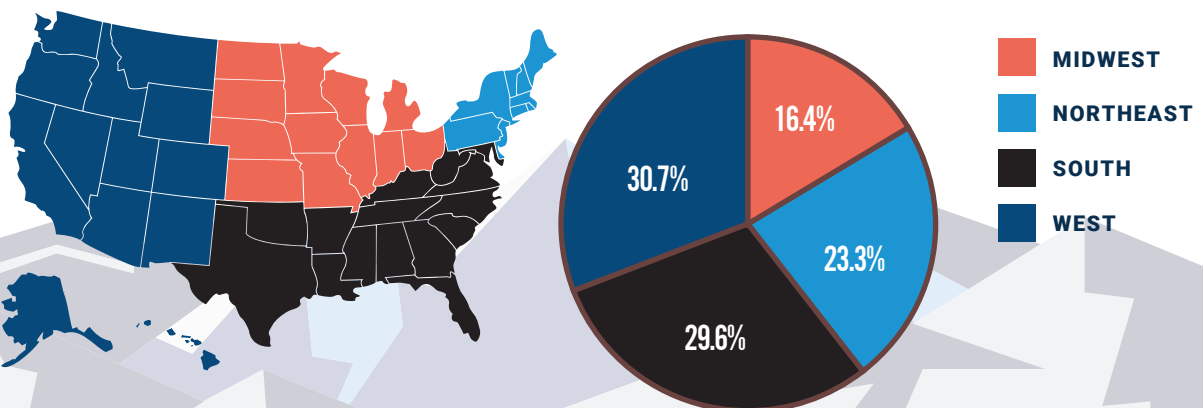
AGE



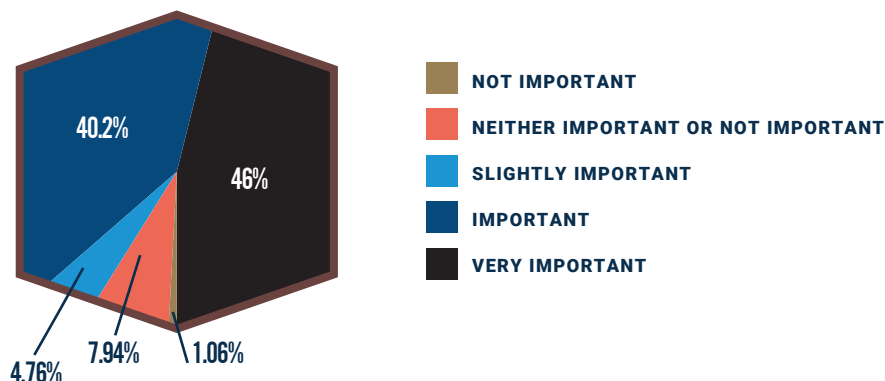
INCOME RANGE



GEOGRAPHY



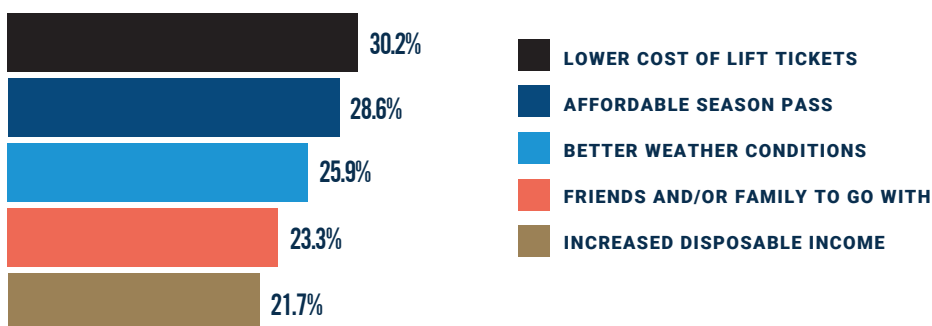
1. HOW IMPORTANT ARE SNOW SPORTS TO YOU?



86.2% of snowboarders indicated that snow sports were either "important" or "very important" to them.

The percentage of first-time snowboarders is 54.5%.

2. WHAT WOULD HELP TO INCREASE YOUR PARTICIPATION IN SNOWBOARDING?

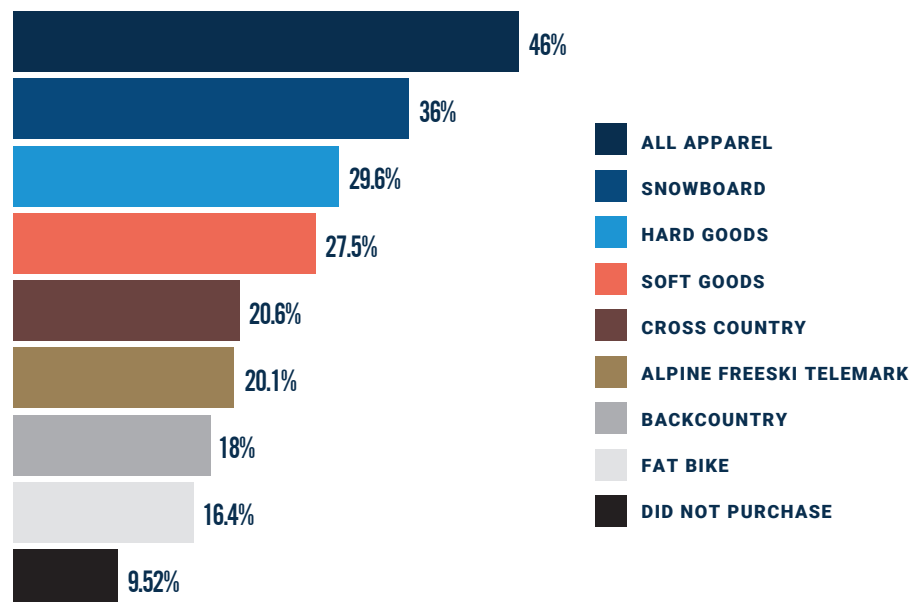


"Lower cost of gear" was also important for first-time snowboarders (17.5%) and engaged snowboarders (24.4%).

The top factor to increase participation for first-time snowboarders is "better weather conditions".

The top factor for engaged snowboarders is "lower cost of day lift tickets".

3. DID YOU PURCHASE ITEMS IN ANY OF THE FOLLOWING SNOW SPORT EQUIPMENT OR WINTER APPAREL DURING SEPTEMBER '17 TO AUGUST '18?

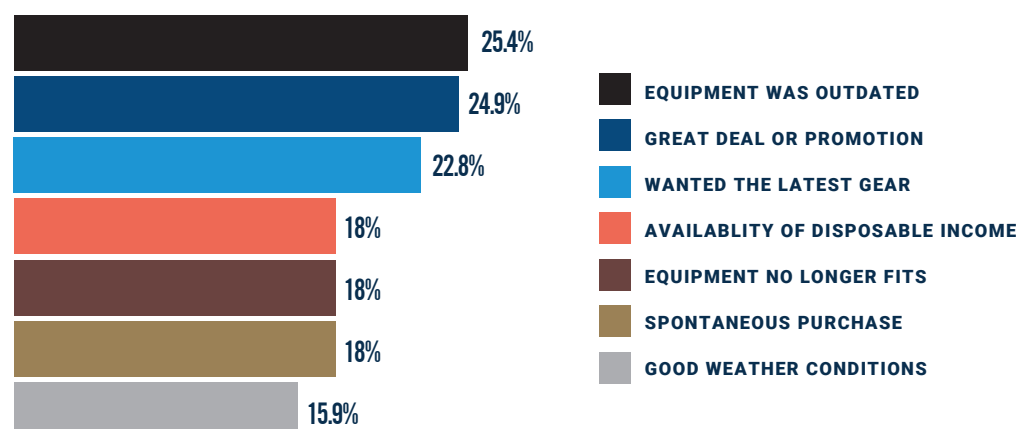


94% of first-time snowboarders made at least one snow sports gear purchase last year as compared to engaged snowboarders (86%).

First-time (29%) and engaged (30%) snowboarders purchased "hard goods" at similar rates.

42% of first-timer snowboarders purchased "apparel" as compared to 51% of engaged snowboarders who did.

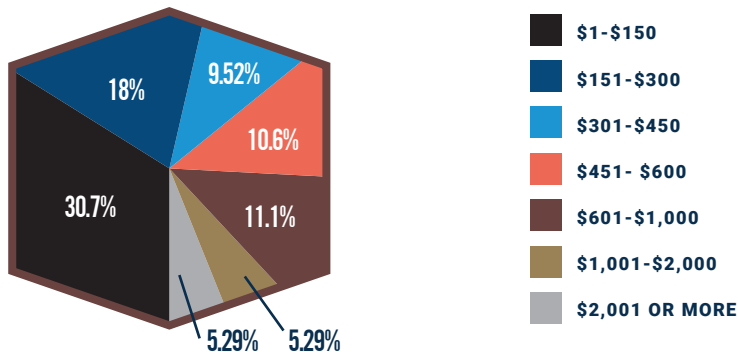
4. WHAT WERE YOUR REASONS FOR MAKING THESE PURCHASES DURING SEPTEMBER '17 TO AUGUST '18?



For first-time snowboarders, the top reason for purchasing was "wanted the latest gear" (23%).

For engaged snowboarders, the top reasons were "great deal/promotion" (30%) and "equipment was outdated" (29%).

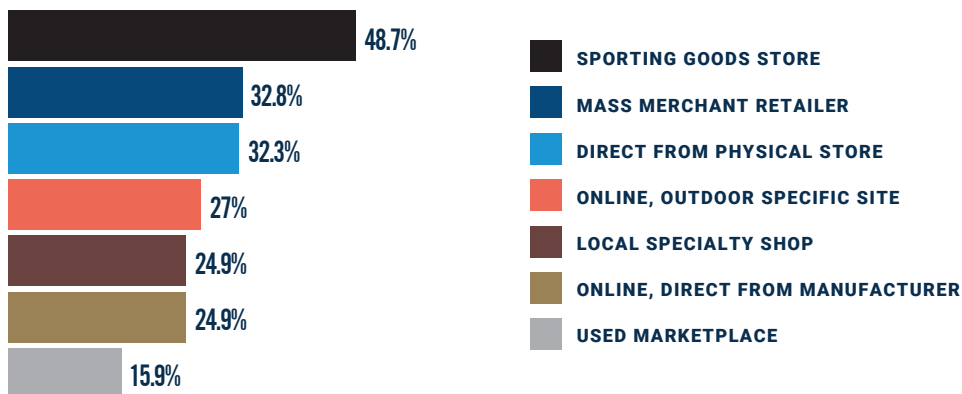
5. APPROXIMATELY HOW MUCH DO YOU THINK YOU SPENT ON SNOW SPORT EQUIPMENT/ACCESSORIES DURING SEPTEMBER '17 TO AUGUST '18?



More first-time snowboarders (51%) have lower budgets—i.e. \$300 or less—as compared to engaged snowboarders (46%).

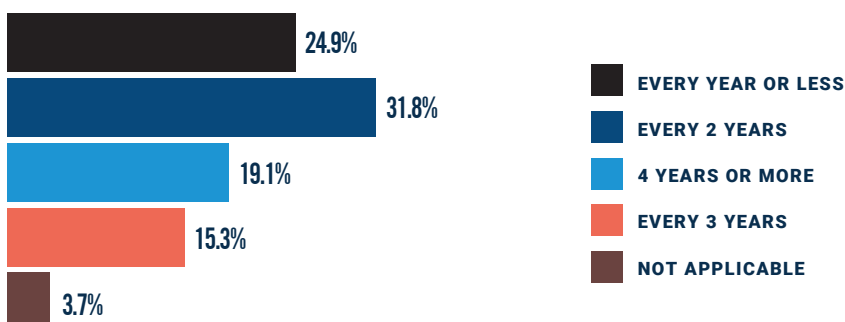
As budgets go above \$1,000 there are also more first-time snowboarders (13%) as compared to engaged snowboarders (8%).

6. WHERE DO YOU TYPICALLY PURCHASE YOUR SNOW SPORT EQUIPMENT/CLOTHING?

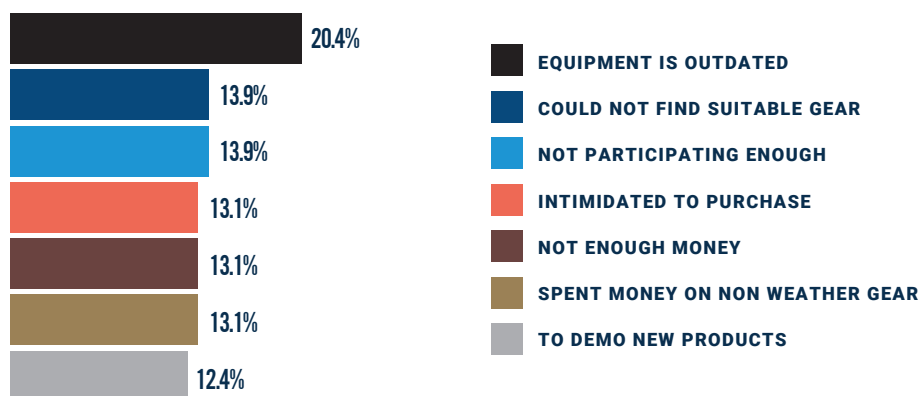


16% of snowboarders purchased from the “used marketplace” and 26% purchased from “outdoor-specific specialty sites”.

7. HOW FREQUENTLY DO YOU PURCHASE SNOWBOARD GEAR?



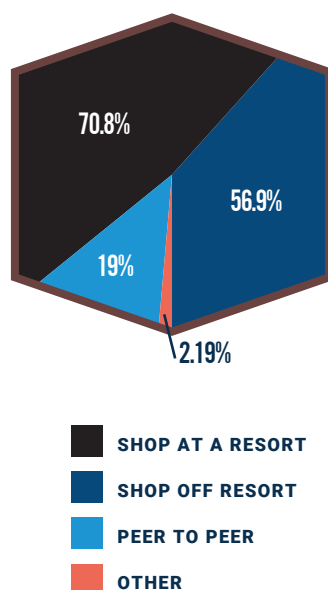
8. WHAT ARE YOUR REASONS FOR RENTING SNOWBOARD EQUIPMENT?



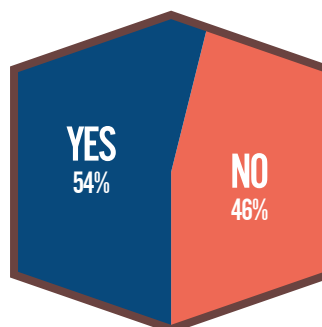
The main reason first-time snowboarders rent is, "could not find suitable gear" (18%).

For engaged snowboarders, the main reason is that they are "not participating enough" (17%).

9. WHERE DO YOU RENT YOUR EQUIPMENT?



9a. DO YOU RENT EQUIPMENT FOR THE FULL SEASON?



For first-time snowboarders who rent, 61% do a "full-season rental." Compare this to engaged snowboarders (57%).

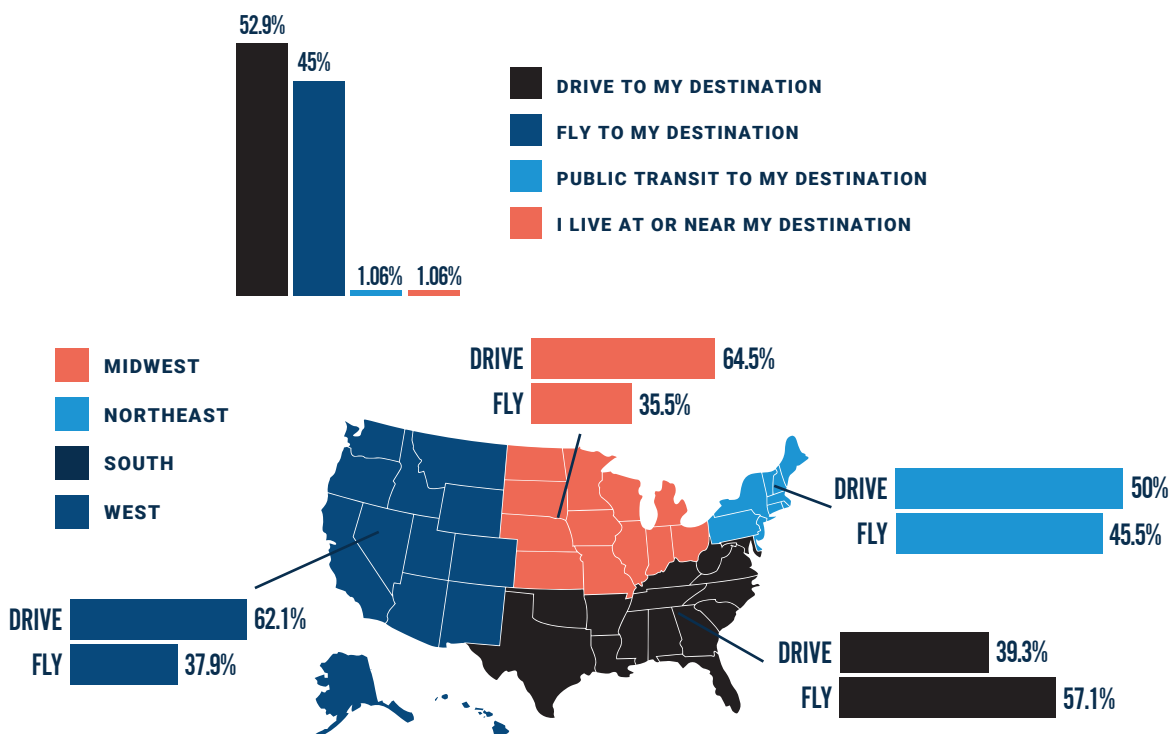
Examining how snowboarders get to their destinations provides further insights into their related behaviors.

10. OVER THE LAST THREE SEASONS (2015 TO 2018), HOW WOULD YOU IDENTIFY YOUR SNOWBOARD TRIPS?

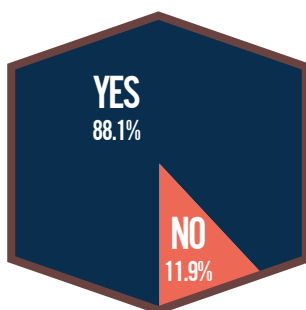
For “engaged” snowboarders, 21% had no change in their frequency nor their length of trips, 13% were taking more, shorter trips, 20% were taking more, longer trips, 16% were taking fewer, shorter trips, 8% were taking the same number of trips, but shorter, 6.7% were taking the same number of trips, but longer, 6.7% were taking fewer trips, but longer and 8% were unpredictable regarding their trips.

11. WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU GET TO YOUR SNOWBOARDING DESTINATION THE MOST OFTEN?

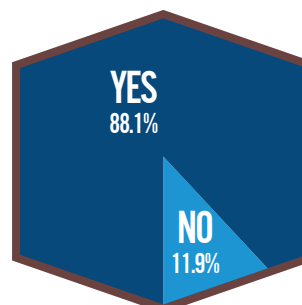
As snowboarders get to their destinations, 53% of them drive. 45% of them fly, 1% of them take public transit and 1% of them walk (i.e. live at/nearby).



12. DO YOU USUALLY PURCHASE A MULTI-RESORT SEASON PASS?



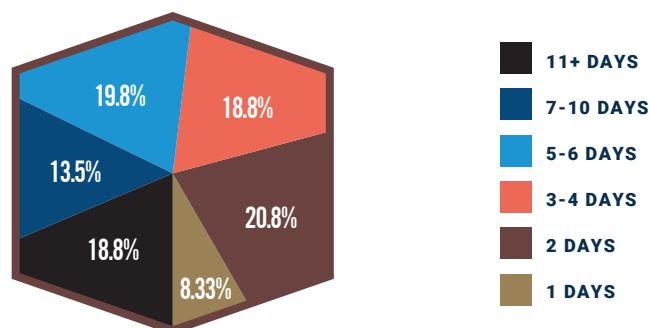
12a. IF YES, DO YOU USE YOUR MULTI-RESORT SEASON PASS AT DIFFERENT RESORTS?





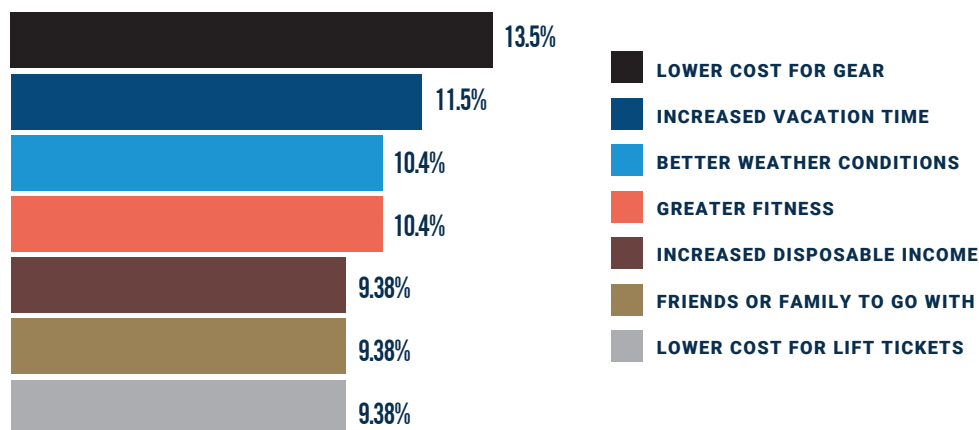
Day-trippers are those snowboarders who travel to their destinations and return home later in the day.

13. HOW MANY DAY TRIPS (NON-VACATION) DO YOU TYPICALLY TAKE DURING A WINTER SEASON TO SNOWBOARD? DAY TRIPS MEAN YOU WENT TO AND FROM YOUR SNOWBOARD DESTINATION.



Considering day trip frequency by age we see that 44% of 45 – 54-year-olds went on five or more day-trips, followed by 18 – 24-year-olds at 42%. Next, we have of 35 – 44-year-olds (40%). There is quite a drop-off for the 25 – 34-year-olds (19%). Finally, 55-year-olds and above did not go on five or more day-trips.

14. WHAT ARE THE MAIN REASONS YOU ARE TAKING MORE TRIPS?



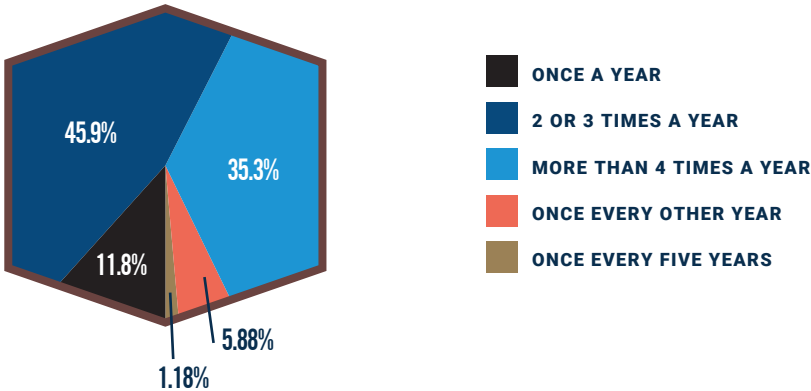
The top “reasons” for *first-timer* snowboarders are: lower costs for gear, increased disposable income and greater fitness. By comparison, the top “reasons” for *engaged* snowboarders are: increased vacation time and affordable season pass.



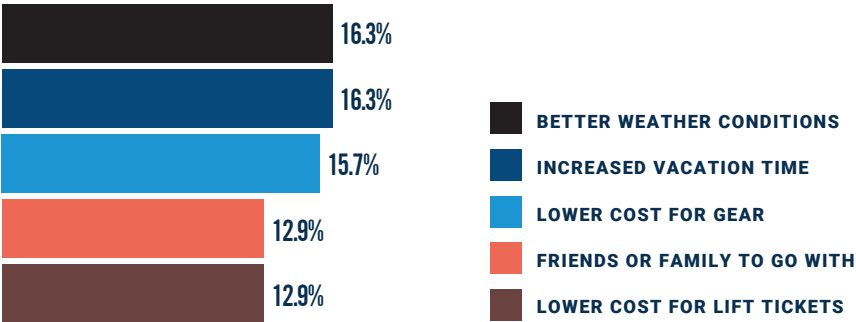
SNOWBOARDERS IN THIS STUDY

Vacationers are those snowboarders who travel to their destinations and stay over at least one night.

15. HOW OFTEN HAVE YOU TAKEN A SNOW SPORT VACATION IN THE LAST FIVE YEARS? MEANING, YOU SPECIFICALLY TOOK A VACATION TO PRIMARILY TAKE PART IN A SNOW SPORT SUCH AS SKIING, SNOW SHOEING, SNOWBOARDING, ETC.

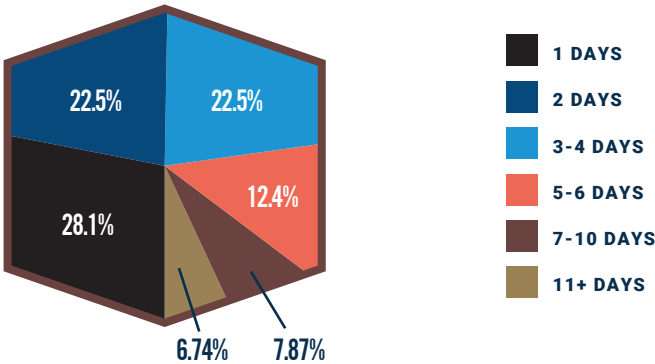


16. WHAT ARE THE MAIN REASONS YOU ARE TAKING MORE TRIPS?



The top reasons for *first-timer* snowboarders are: better weather and lower costs for gear and lift tickets. By comparison, the top reasons for *engaged* snowboarders are: increased vacation time, lower cost of gear and feeling welcome in activity.

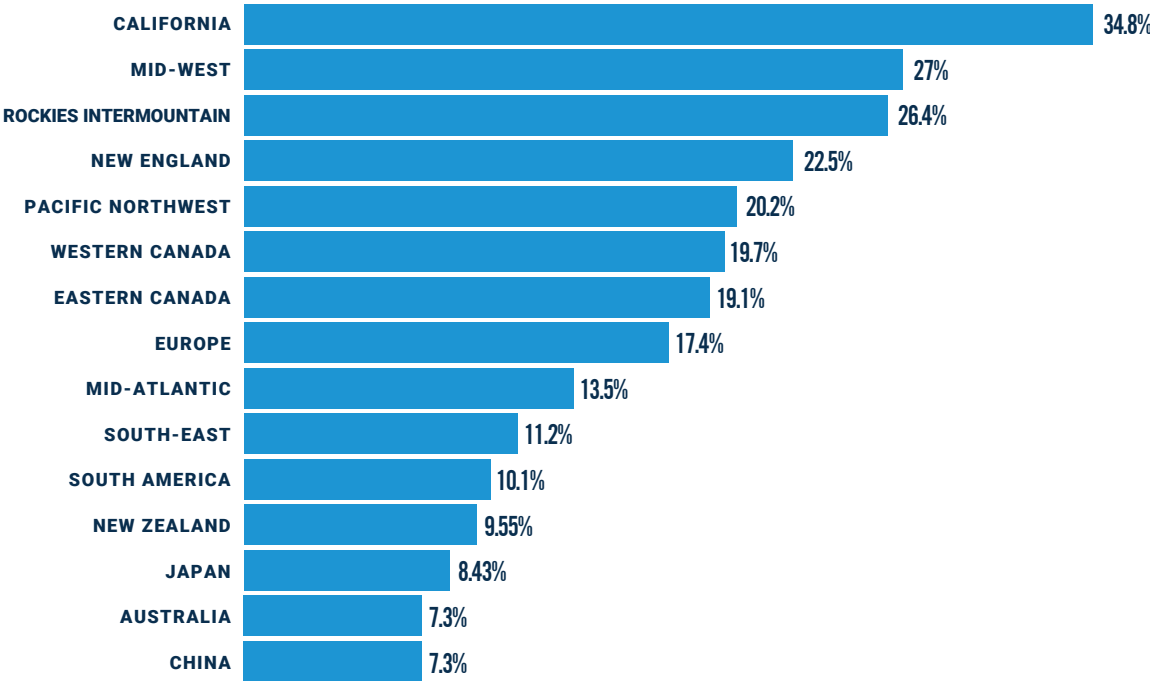
17. HOW MANY VACATIONS DO YOU TYPICALLY TAKE DURING A WINTER SEASON TO SNOWBOARD? VACATIONS MEAN YOU STAYED AT LEAST ONE NIGHT AT YOUR DESTINATION.



For first-time snowboarders, 29% went (5) or more times. For engaged snowboarders, it was 24%.



18. WHICH REGION[S] HAVE YOU TRAVELED TO FOR YOUR SNOWBOARD VACATION IN THE LAST FIVE YEARS?

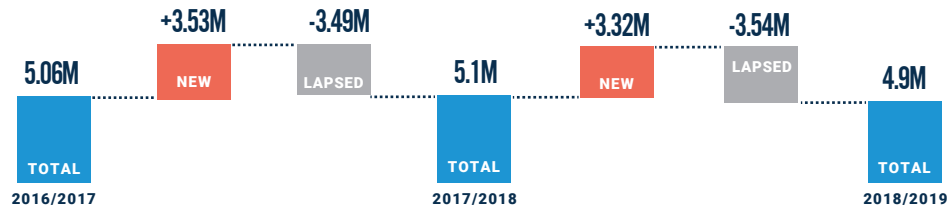


CROSS-COUNTRY





THE TOTAL NUMBER OF CROSS-COUNTRY SKIERS 6 YEARS OF AGE AND OLDER WAS **5.1M** IN 2017-18 AND **4.9M** IN 2018-19. THIS IS A **-4.4%** CHANGE SEASON OVER SEASON.



AT THE END OF 2016/2017 THERE WERE **5.06M** CROSS-COUNTRY SKIERS.

DURING THE 2017/18 SEASON **3.53M** STARTED/RETURNED, WHILE **-3.49M** LAPSED. THE SEASON ENDED WITH **5.1M** CROSS-COUNTRY SKIERS.

DURING THE 2018/19 SEASON **+3.32M** STARTED/RETURNED, WHILE **-3.54M** LAPSED. THE SEASON ENDED WITH **4.9M** CROSS-COUNTRY SKIERS.



THE AVERAGE NUMBER OF DAYS OF CROSS-COUNTRY SKIERS WAS **7.7** FOR BOTH 2017/2018 AND 2018/2019.

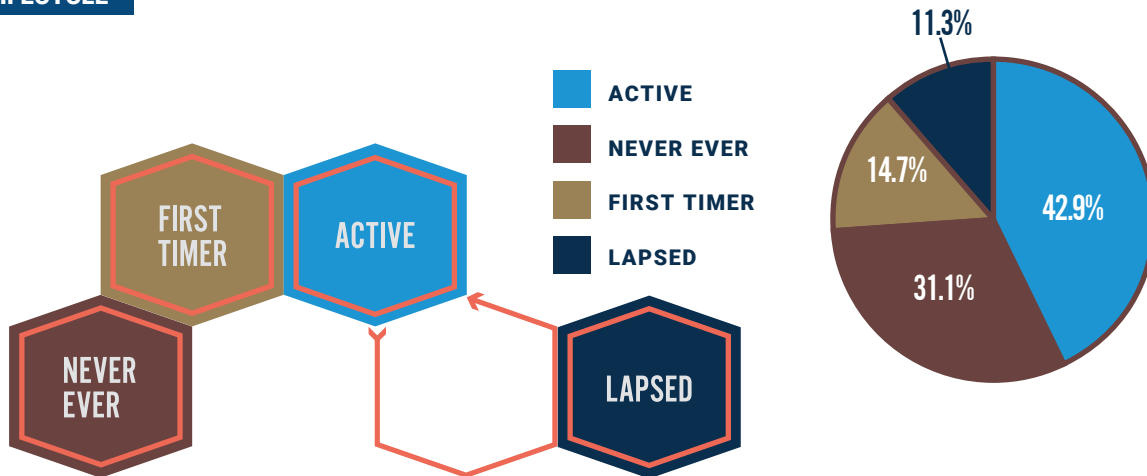


IN 2018/2019, THE TOTAL RETAIL MARKET FOR CROSS-COUNTRY SKIS, BOOTS, BINDINGS AND POLES WAS **\$35.7M** AND **303K** UNITS. IN 2017/2018 THE IT WAS **\$35.3M** AND **320K** UNITS.

*Source: The NPD Group Inc., US Snow Industry Retail Market Report (March, 2018, March 2019)

Note: The following information is based on this study which includes 700 online interviewees aged 18 and above. 450 of those took part in at least one winter sport whereas 250 did not.

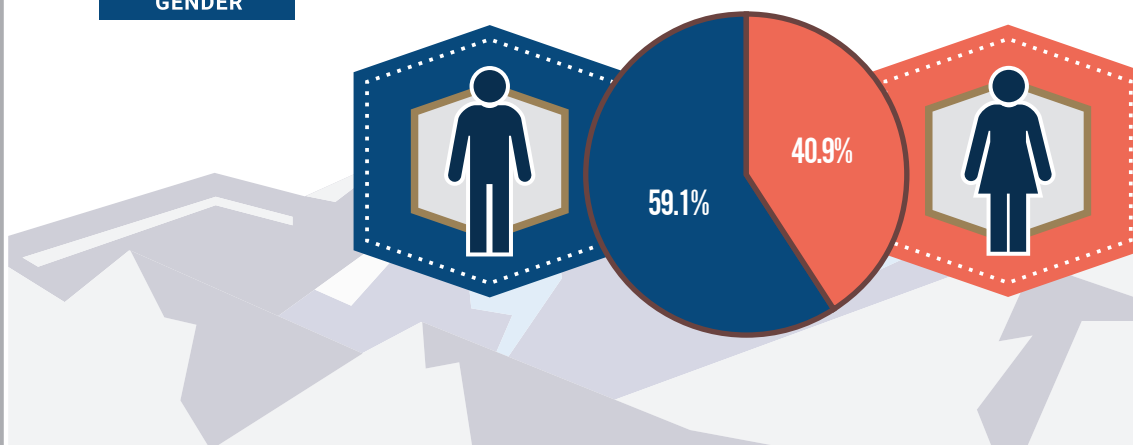
LIFECYCLE



THE FOLLOWING ARE THE STAGES OF THE PARTICIPATION LIFECYCLE

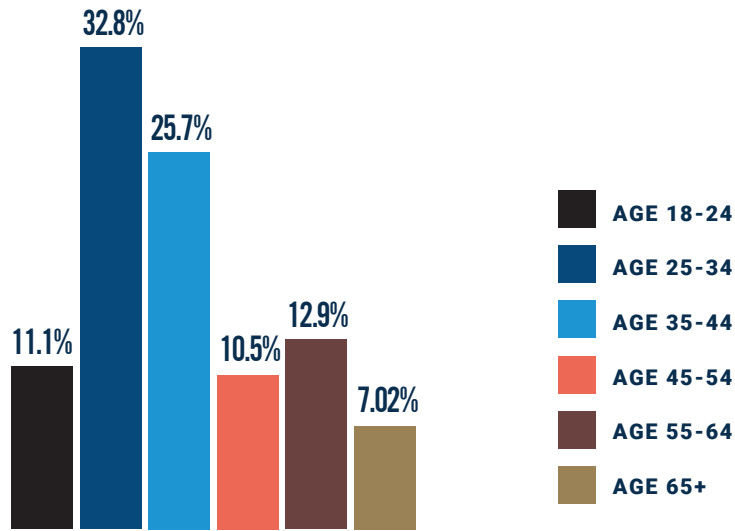
- NEVER EVER** Never Participated – individuals who have never participated
- FIRST TIMER** First-timers – individuals who participated for the first time in 2017-2018
- ACTIVE** Active Participants – individuals who participated 2017-2018 and it was not their first time
- LAPSED** Lapsed – individuals who previously participated, but took 2017-2018 off

GENDER

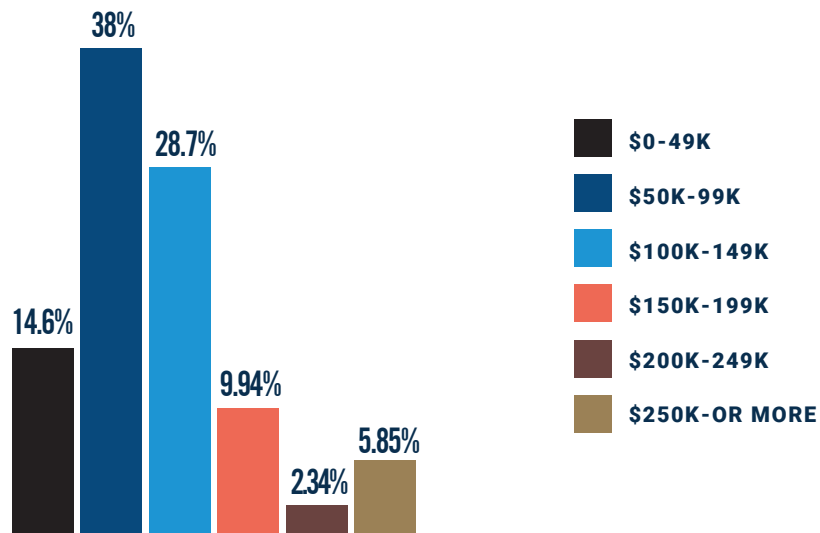




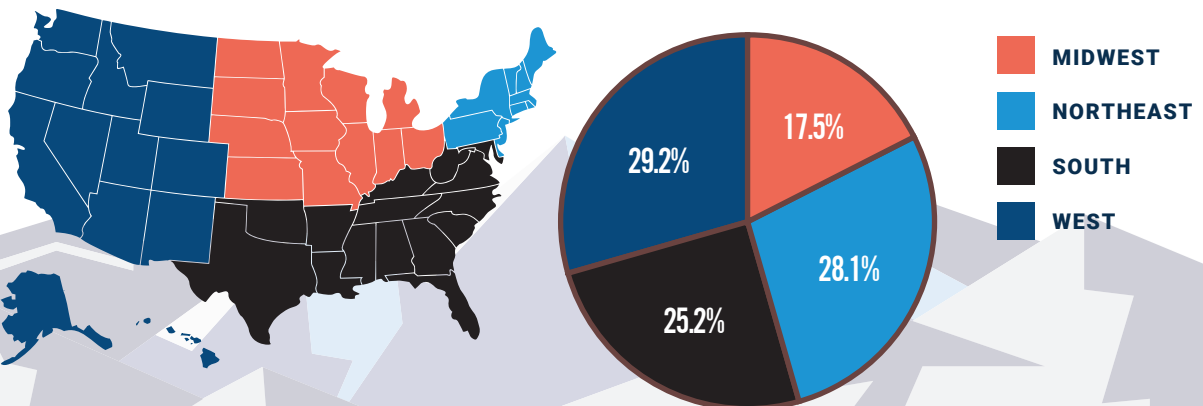
AGE



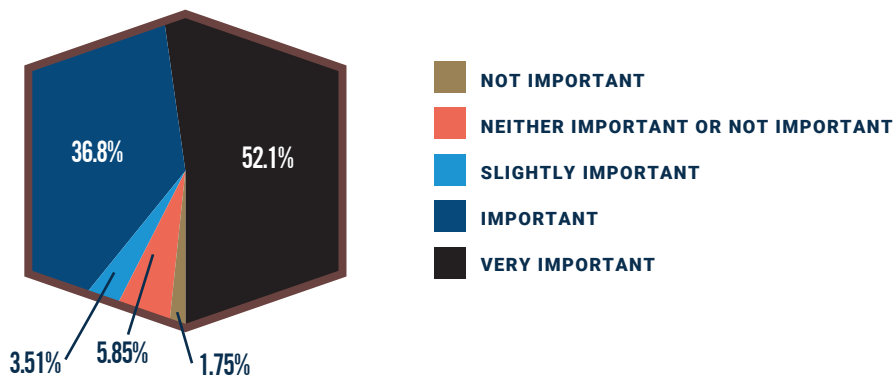
INCOME RANGE



GEOGRAPHY



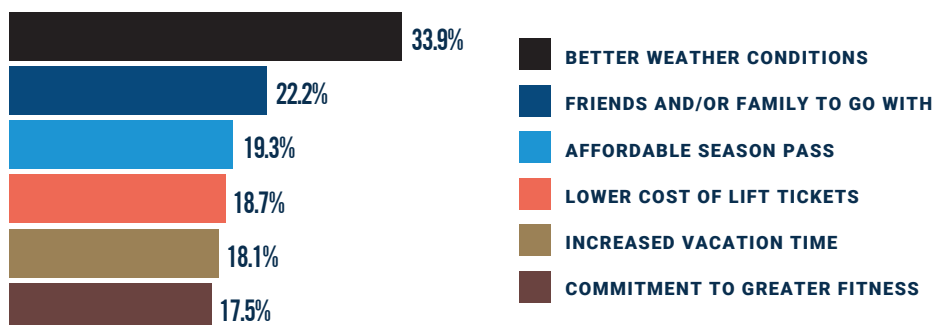
1. HOW IMPORTANT ARE SNOW SPORTS TO YOU?



89% of these cross-country skiers indicated that snow sports were either “important” or “very important” to them.

The percentage of first-time cross-country skiers is 32%.

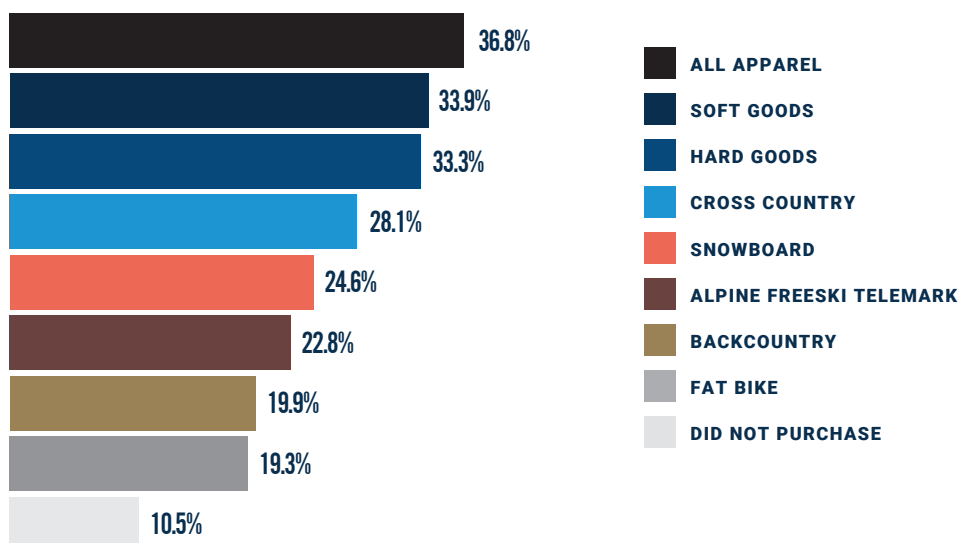
2. WHAT WOULD HELP TO INCREASE YOUR PARTICIPATION IN CROSS-COUNTRY SKIING?



For first-time cross-country skiers, “discounted airline baggage fees” (20%) and “feeling welcome in the activity” (18%) were also important.

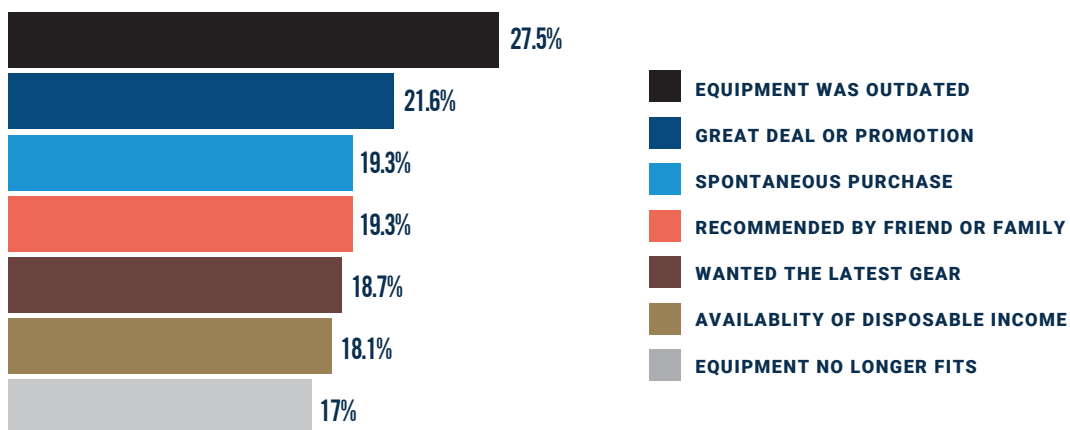
For engaged cross-country skiers, “lower cost for gear” (22%) was also important.

3. DID YOU PURCHASE ITEMS IN ANY OF THE FOLLOWING SNOW SPORT EQUIPMENT OR WINTER APPAREL DURING SEPTEMBER '17 TO AUGUST '18?



98% of first-time cross-country skiers made at least one snow sports gear purchase last year as compared to engaged cross-country skiers (85%). 40% of first-time cross-country skiers purchased "hard goods" compared to engaged cross-country skiers (30%). 10% of first-timer cross-country skiers purchased "apparel" as compared to 35% of engaged cross-country skiers who did.

4. WHAT WERE YOUR REASONS FOR MAKING THESE PURCHASES IN SEPTEMBER '17 TO AUGUST '18?

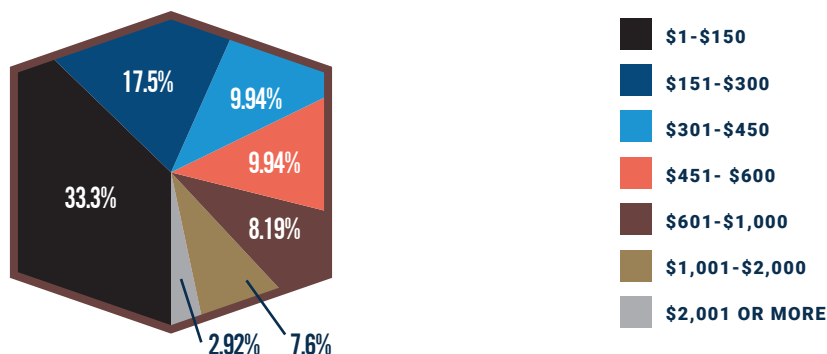


For first-time cross-country skiers, the top reason for purchasing was "availability of disposable income" (29%).

For engaged cross-country skiers, the top reason for purchasing was "equipment was outdated" (29%).

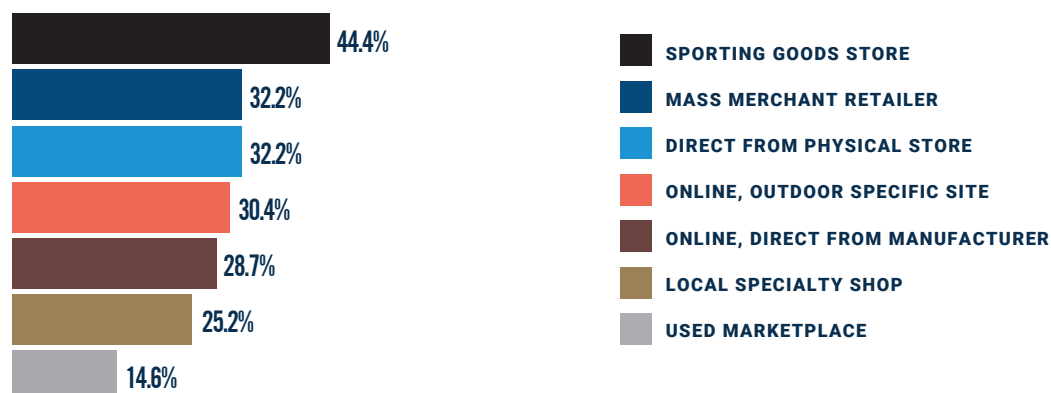
For first-time cross-country skiers, "family/friend recommendations" are more important (25%) as compared to the same for engaged cross-country skiers (16%).

5. APPROXIMATELY HOW MUCH DO YOU THINK YOU SPENT ON SNOW SPORT EQUIPMENT/ACCESSORIES DURING SEPTEMBER '17 TO AUGUST '18?



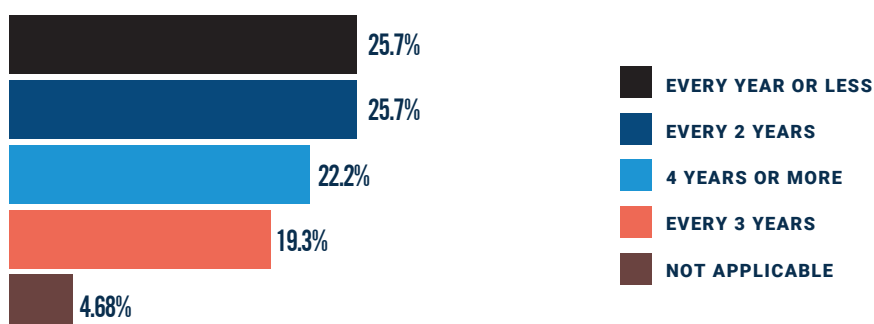
More first-time cross-country skiers (50%) have relatively low budgets—i.e. \$300 or less—as compared to engaged cross-country skiers (53%). As budgets go above \$1,000 there are fewer first-time cross-country skiers (9%) as compared to engaged cross-country skiers (13%).

6. WHERE DO YOU TYPICALLY PURCHASE YOUR SNOW SPORT EQUIPMENT/CLOTHING?

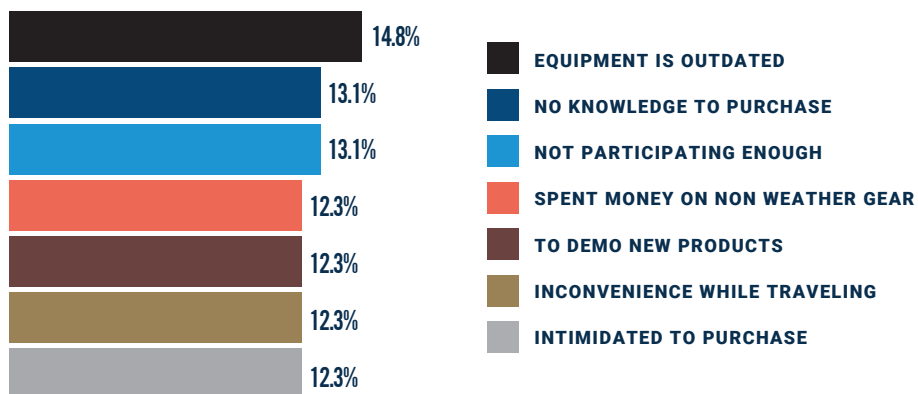


16% of cross-country skiers purchased from the “used marketplace” and 27% purchased from “outdoor-specific specialty sites.”

7. HOW FREQUENTLY DO YOU PURCHASE CROSS-COUNTRY SKI EQUIPMENT?

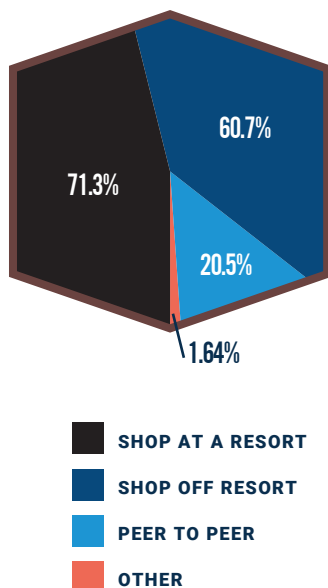


8. WHAT ARE YOUR REASONS FOR RENTING CROSS-COUNTRY SKI EQUIPMENT?

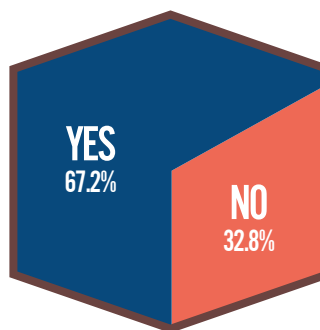


The main reason first-time cross-country skiers rent is, “no knowledge to purchase” (22%). For engaged cross-country skiers, the main reason is that “owned equipment is outdated” (17%).

9. WHERE DO YOU RENT YOUR EQUIPMENT?



9a. DO YOU RENT EQUIPMENT FOR THE FULL SEASON?

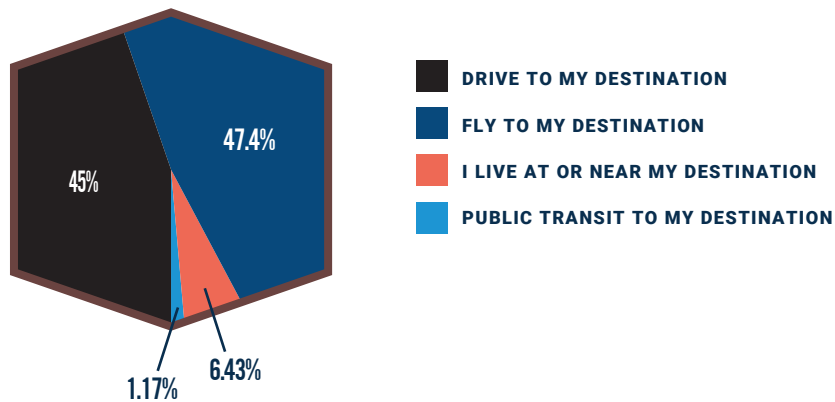


For first-time cross-country skiers who rent, 73% do a “full-season rental” which is different from engaged cross-country skiers (63%).

10. OVER THE LAST THREE SEASONS (2015 TO 2018), HOW WOULD YOU IDENTIFY YOUR CROSS-COUNTRY SKI ACTIVITY?

For “engaged” cross-country skiers, 29% had no change in their frequency nor their length of trips, 17% were taking more, shorter trips, 18% were taking more, longer trips, 14% were taking fewer, shorter trips, 4% were taking the same number of trips, but shorter, 9% were taking the same number of trips, but longer, 6% were taking fewer trips, but longer and 3% were unpredictable regarding their trips.

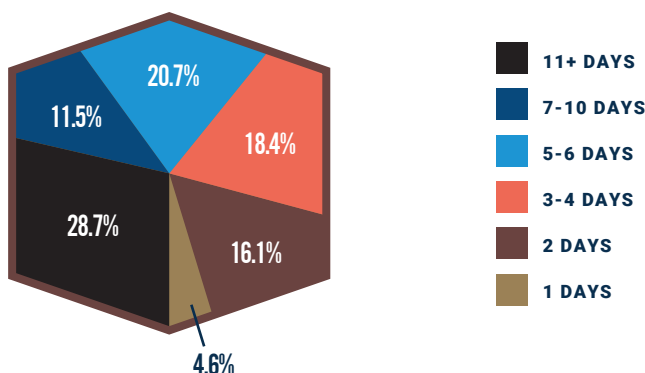
11. WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU GET TO YOUR CROSS-COUNTRY SKI DESTINATION THE MOST OFTEN?



As cross-country skiers get to their destinations, 45% of them drive. 47% of them fly, 1% of them take public transit and 6% of them walk (i.e. live at/nearby).

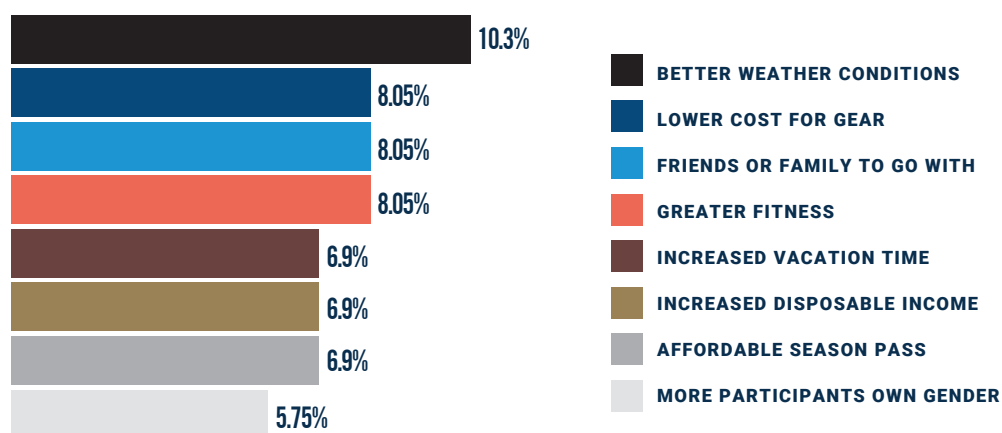


13. HOW MANY DAY TRIPS (NON-VACATION) DO YOU TYPICALLY TAKE DURING A WINTER SEASON TO PARTICIPATE IN CROSS-COUNTRY SKIING? DAY TRIPS MEAN YOU WENT TO AND FROM YOUR CROSS-COUNTRY SKIING DESTINATION.



Considering day trip frequency by age we see that 42% of 18 – 34-year-olds went on five or more day-trips, followed by 45 – 54-year-olds and 65+ year-olds tied at 40%. 35 – 44-year-olds were at 22% for five or more day-trips. Finally, 55 – 64-year-olds were at 20%.

14. WHAT ARE THE MAIN REASONS YOU ARE TAKING MORE TRIPS?

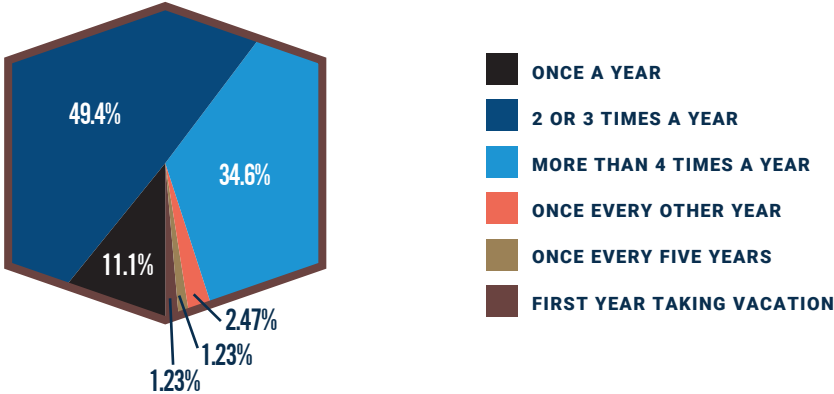


The top reasons for first-timer cross-country skiers are: “lower cost of gear” and “greater fitness”. By comparison, the top reasons for engaged cross-country skiers are: “better weather”, “increased vacation time”, “affordable season pass”.

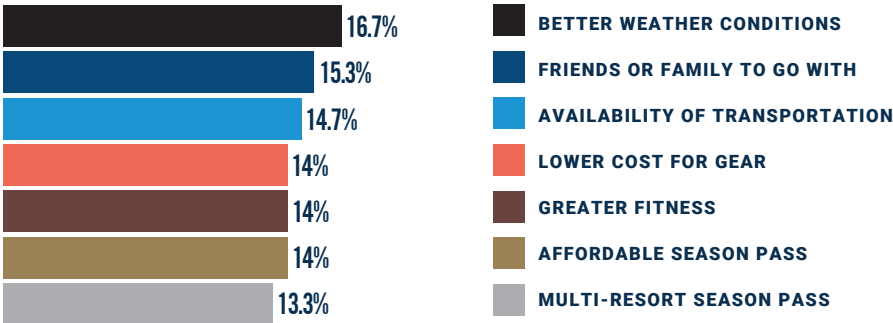


CROSS-COUNTRY SKIERS IN THIS STUDY

15. HOW OFTEN HAVE YOU TAKEN A SNOW SPORT VACATION IN THE LAST FIVE YEARS? MEANING, YOU SPECIFICALLY TOOK A VACATION TO PRIMARILY TAKE PART IN A SNOW SPORT SUCH AS SKIING, SNOW SHOEING, SNOWBOARDING, ETC.

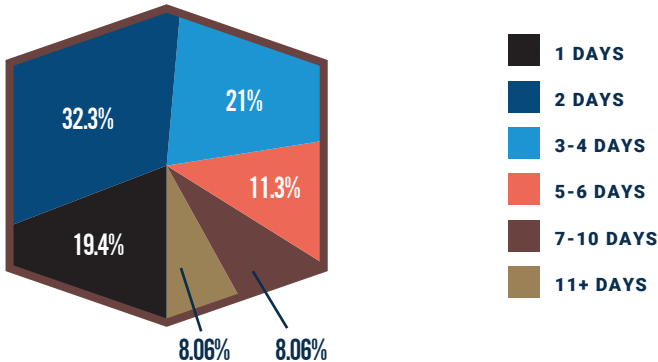


16. WHAT ARE THE MAIN REASONS YOU ARE TAKING MORE TRIPS?



The top reasons for first-timer cross-country skiers are: “better weather conditions” and “availability of transportation” and “greater fitness”. By comparison, the top reasons for engaged cross-country skiers are: “friends and family to go with” and “affordable season pass”.

17. HOW MANY VACATIONS DO YOU TYPICALLY TAKE DURING A WINTER SEASON TO CROSS-COUNTRY SKI? VACATIONS MEAN YOU STAYED AT LEAST ONE NIGHT AT YOUR DESTINATION.

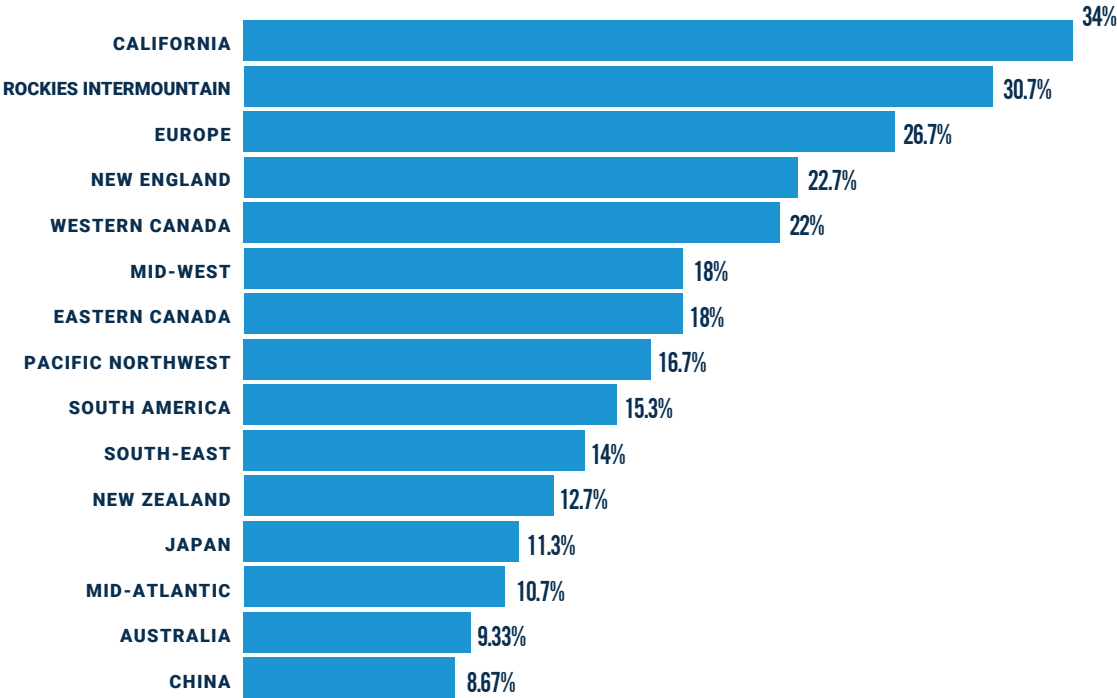


For first-time cross-country skiers, 29% went (5) or more times. For engaged cross-country skiers, it was 25%.



CROSS-COUNTRY SKIERS IN THIS STUDY

18. WHICH REGION[S] HAVE YOU TRAVELED TO FOR YOUR CROSS-COUNTRY SKI VACATION IN THE LAST FIVE YEARS?



BACKCOUNTRY



THE TOTAL NUMBER OF ALPINE TOURING PARTICIPANTS IN 2017-2018 WAS **703K**.



THE TOTAL NUMBER OF SNOWBOARD TOURING PARTICIPANTS IN 2017-2018 WAS **682K**.

ABOUT SIA RESEARCH

SIA PUBLISHES A WIDE VARIETY OF RESEARCH PRODUCTS.

FOR INFORMATION ON RESEARCH VISIT [SNOWSPORTS.ORG/RESEARCH](https://snowsports.org/research).

NPD MONTHLY RETAIL SALES REPORTS

- TOP-LINE RETAIL DATA THAT COVERS THE ENTIRE WINTER SEASON, ISSUED MONTHLY FROM NOVEMBER TO MAY.
- FREE TO SIA PREMIUM, STANDARD, REP AND RETAIL MEMBERS

WHOLESALE SALES AND ORDERS SURVEY(S)

- PROVIDING AGGREGATED WHOLESALE MARKET DATA
- CONDUCTED TWICE A YEAR TO PROVIDE VALUABLE DATA ON SELL-IN AND IN-SEASON SALES
- ONLY AVAILABLE TO SIA MEMBERS THAT PARTICIPATE

2018 WINTER PARTICIPATION STUDY

- CREATED IN CONJUNCTION WITH THE PHYSICAL ACTIVITY COUNCIL, AN IN-DEPTH LOOK AT WINTER SPORTS DEMOGRAPHICS ACROSS THE US, INCLUDING SKI, SNOWBOARD, NORDIC, AND BACKCOUNTRY
- FREE TO SIA MEMBERS | \$1,500 FOR NON-MEMBERS

PARTICIPATION INSIGHTS REPORT

THIS STUDY TAKES A CLOSER LOOK AT THE OPINIONS AND HABITS OF WINTER SPORTS PARTICIPANTS, INCLUDING GENERAL DEMOGRAPHICS, RETAIL AND TRAVEL INSIGHTS.

- FREE TO PREMIUM MEMBERS | \$250 FOR STANDARD AND SUPPORTING MEMBERS | \$500 FOR NONMEMBERS

CUSTOM RESEARCH

SIA'S RESEARCH PROVIDES THE WINTER INDUSTRY WITH CRUCIAL RETAIL, CONSUMER AND PARTICIPATION DATA, HELPING OUR MEMBERS MAKE INSIGHTFUL, DATA-DRIVEN DECISIONS TO ENHANCE THEIR BUSINESSES.

- SIA HAS THE ABILITY TO CREATE CUSTOM QUERIES WITHIN OUR RESEARCH DATABASE, AND HELP BUILD CUSTOM SURVEYS USING CONSUMERS FROM A MEMBER'S DATABASE. WE HAVE THE KNOWLEDGE AND EXPERIENCE TO BUILD THE RIGHT QUESTIONS FOR YOUR SURVEY.
- PRICE DEPENDENT ON SCOPE

CONSUMER RESEARCH

STARTING IN 2017, THE FOLLOWING SURVEYS HAVE BEEN ISSUED EACH YEAR TO A NATIONWIDE GROUP OF CONSUMERS. RESULTS CAN BE PURCHASED INDIVIDUALLY OR YEAR OVER YEAR.

- CONSUMER ANTICIPATION (EARLY SEASON)
- SNOW SPORTS RETAIL CONSUMER BEHAVIOR
- RETAIL AND DIRECT-TO-CONSUMER FOR SNOW SPORTS
- HOLIDAY PURCHASES
- SNOW SPORTS USED MARKETPLACE
- SNOW SPORTS CONSUMER RENTAL AND SERVICE
- SNOW SPORTS TECHNOLOGY AND PARTICIPATION
- DIVERSITY IN THE SNOW SPORTS INDUSTRY
- ANY EVENT (E.G. 2018 WINTER OLYMPICS) IMPACT
- CONSUMER RETAIL PULSE (MONTHLY)
- \$250 PER REPORT | \$500 FOR A YOY COMPARISON