



Nitro Snowboards

SIA Snow Sports Participant Study

2015



Copper Mountain/Tripax Pro



Fischer Sports



Tubbs Snowboards

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METHODOLOGY

This Snow Sports Participant Report is derived from data produced by the Physical Activity Council (PAC), a partnership of six of the major trade associations in US sports, including the International Health, Racquet & Sportclub Association, the National Golf Foundation, the Outdoor Foundation, the Sports and Fitness Industries Association, the Tennis Industry Association and SnowSports Industries America. The overall aim of the data produced is to establish levels of activity and identify key trends in sports, fitness and recreation participation in the US.

During January and February of 2014, a total of 19,240 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel of over one million people operated by Synovate/IPSOS. A total of 7,528 individual and 11,712 household surveys were completed. The total panel is maintained to be representative of the US population for people ages 6 and older. Over sampling of ethnic groups took place to boost response from typically under responding groups. During April and May, another 19,000 interviews were conducted on seasonal participation. The 2014 participation survey provides a high degree of statistical accuracy. All surveys are subject to some level of standard error—that is, the degree to which the results might differ from those obtained by a complete census of every person in the US. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.31 percentage points at the 95 percent confidence level. This translates to plus or minus four percent of participants.

A weighting technique was used to balance the data to reflect the total US population ages six and above. The following variables were used: gender, age, income, household size, region, population density and panel join date. The total population figure used was 290,001,000 people ages six and older. Snow Sports participant numbers were subjected to triennial rolling average summation to ensure accurate results in smaller categories and demographic projections.

Additionally, The results of this study were validated by correlation with retail data (SIA RetailTRAK™ produced by the Leisure Trends, an NPD Group Company), sales and orders data (aggregated by Sports Marketing Services for SIA), and skier rider visit data (from the Kottke End of Season report produced by the National Ski Areas Association).



KEY FINDINGS

- The 2013/2014 season brought out 18,999,000 snow sports participants into the cold, down 1%.
- Snowboarders participated the most this season, averaging 8.4 days.
- California is home to more snow sports participants than any other state.
- Close to 9 million people identify themselves as a snow sports participant, but didn't make it to the slopes last season; up 36% from last season.
- Snowboarding brought out the most kids last season, with 26% of snowboarders under age 17; alpine ski (23%) and freeski (21%) were close behind.
- Forty percent of core alpine skiers (9+ days) are under age 17, up 20% from last season.
- Women represented 44% of cross country skiers and snowshoers last season; more than any other snow sport.

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PARTICIPATION DEMOGRAPHICS



SNOW SPORTS PARTICIPANT PROFILE

| | |
|---|---|
| Total Number That Identify Themselves as Snow Sports Participants | 31,775,000 |
| Total Number of Active Snow Sports Participants in 2014/2015 | 21,841,000 |
| Total Number that Identify as Participants but did not Ski/Ride in 2014/2015 | 9,934,000 |
| Average Age | 16% ages 6-12, 10% ages 13-17, 15% ages 18-24, 22% ages 25-34, 16% ages 35-44, 12% ages 45-54, 6% ages 55-64 and 3% over 65 |
| Gender of Participants | 58% Male, 42% Female |
| Percent of Participants with a Bachelor's Degree or Higher | 58% |
| Percent with Household Income >\$75K | 55% |
| Most Popular Snow Sports Activity | Alpine Ski (9,378,000 Participants) |
| State with Most Participants | California |
| State with Most Participants Per Capita | Idaho |
| Most Common Reason for Not Participating | No One To Go With |
| Number of Multi-Discipline Active Participants | 19,687,000 |
| Most Common Non-Snow Sport Crossover Activity | Walking for Fitness |

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ALPINE SKI PARTICIPANT PROFILE

| | |
|--|--|
| Total Alpine Ski Participation | 9,378,000 |
| Age | 25% are between 6-17, 56% are ages 18-44, 17% are 45-64 and 2% are 65+ |
| Gender | 59% Male, 41% Female |
| Percent with Head of Household Income >\$75K | 67% |
| Percent of Core (9+ Days) Alpine Skiers with Head of Household Income >\$75K | 71% |
| Percent with Bachelor's Degree or Higher | 51% |
| States with the Most Alpine Skiers | CA, NY, TX, OH, FL |
| Percent of Alpine Skiers that also Snowboard | 23% |
| Percentage of Alpine Skiers who Participated 9 Days or More | 23% |
| Average Number of Days Participated | 7.8 |
| Percentage of Alpine Skiers Who Participated in Sledding/Saucer Riding | 27% |

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Note: average retail prices include carryover.



SNOWBOARD PARTICIPANT PROFILE

| | |
|--|--|
| Total Snowboard Participation | 7,676,000 |
| Age | 29% under 17, 47% between 18-34, 22% are ages 35-54 and 2% are 55+ |
| Gender | 62% Male, 38% Female |
| Percent with Head of Household Income >\$75K | 56% |
| Percent with Bachelor's Degree or Higher | 43% |
| States with the Most Snowboarders | CA, NY, TX, WA, FL |
| Percent of Snowboarders who also Alpine Ski | 32% |
| Percentage of Snowboarders Who Participated in Sledding/Saucer Riding | 22% |
| Percentage of Snowboarders Who Participated 9 Days or More | 25% |
| Average Number of Days Participated | 8.4 |

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Note: average retail prices include carryover.



FREESKI PARTICIPANT PROFILE

FREESKIING DEFINED IN SURVEY: “BUMPS AND JUMPS, NATURAL AND MANMADE FEATURES, AND PARK SKIING”

| | |
|--|---|
| Total Freeski Participation | 4,465,000 |
| Age | 21% under 17, 48% between 18 and 34, 20% ages 35-44 and 11% over 45 |
| Gender | 59% Male, 41% Female |
| Percent with Head of Household Income >\$75K | 64% |
| Percent with Bachelor's Degree or Higher | 46% |
| Region with the Most Freeskiers | Pacific |
| Percentage of Freeskiers Who Participated 9 Days or More | 24% |
| Percentage of Freeskiers who Participated in Sledding/Saucer Riding | 32% |
| Percent who also Alpine Ski | 38% |
| Most Popular Activity Off-Snow | Golf(42%) |
| Average Number of Days Participated | 7.5 |

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CROSS COUNTRY PARTICIPANT PROFILE

| | |
|--|---|
| Total Cross Country Ski Participation | 4,146,000 |
| Age | 18% under 17, 13% between 18 and 24, 48% ages 25-44, 18% 45-64 and 3% 65+ |
| Gender | 54% Male, 46% Female |
| Percent with Head of Household Income >\$75K | 59% |
| Percent with Bachelor's Degree or Higher | 52% |
| Region with the Most XC Skiers | Pacific |
| Percent who also Alpine Ski | 36% |
| Percentage of XC Skiers Who Participated 9 Days of More | 24% |
| Average Number of Days Participated | 7.2 |

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BACKCOUNTRY SKIERS

| Resort Backcountry Skiers | |
|------------------------------------|--|
| Total | 3,312,000 |
| Age | 32% under 17, 38% between 18 and 34, 21% between 35 and 44, 9% over 45 |
| Gender | 72% Male, 28% Female |
| Bachelor's Degree or Higher | 40% |
| Region | Pacific |
| Income > \$75K | 83% |

| Non-Resort Backcountry Skiers | |
|------------------------------------|---|
| Total | 1,207,000 |
| Age | 26% under 17, 44% between 18 and 34, 15% between 35 and 44, 15% 45 and over |
| Gender | 61% Male, 39% Female |
| Bachelor's Degree or Higher | 54% |
| Region | Pacific & Mid Atlantic |
| Income > \$75K | 72% |



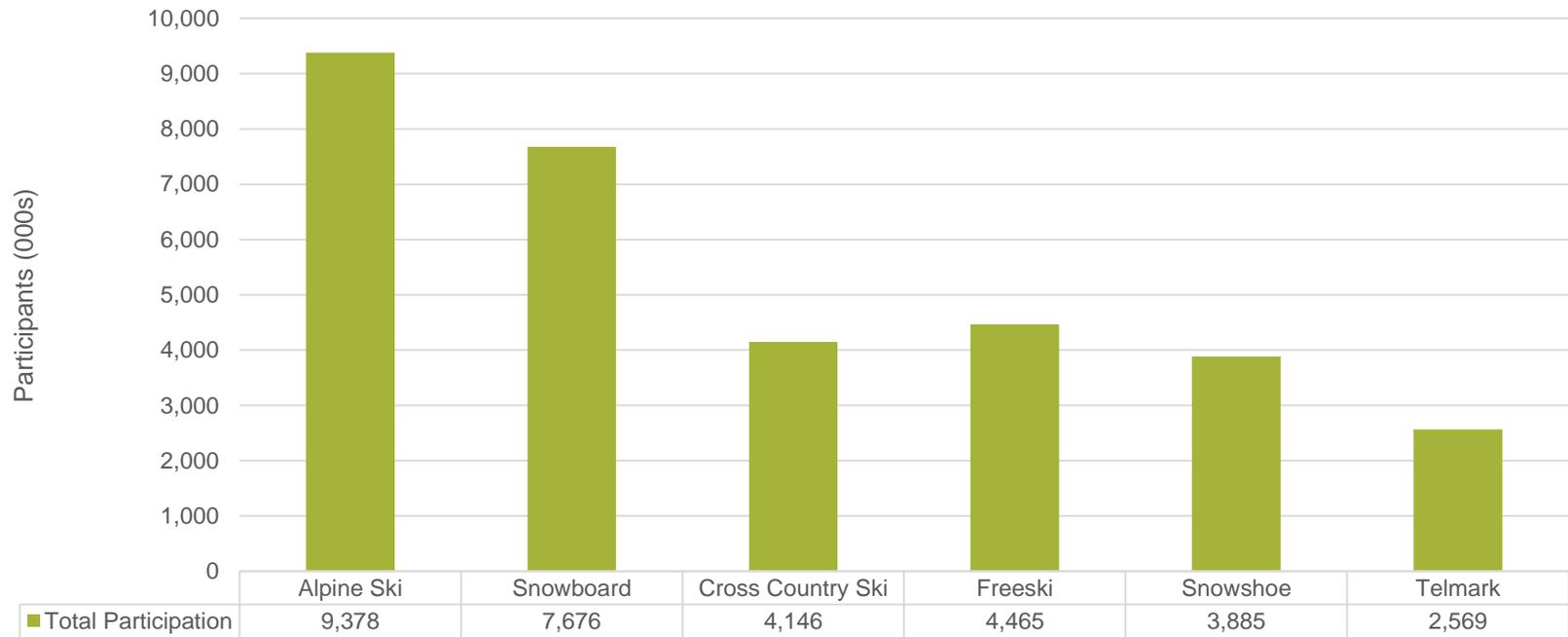
BACKCOUNTRY SNOWBOARDERS

| Resort Backcountry Riders | |
|------------------------------------|--|
| Total | 2,254,000 |
| Age | 35% under 17, 39% between 18 and 34, 26% over 35 |
| Gender | 48% Male, 34% Female |
| Bachelor's Degree or Higher | 30% |
| Region | Mid Atlantic & Pacific |
| Income > \$75K | 72% |

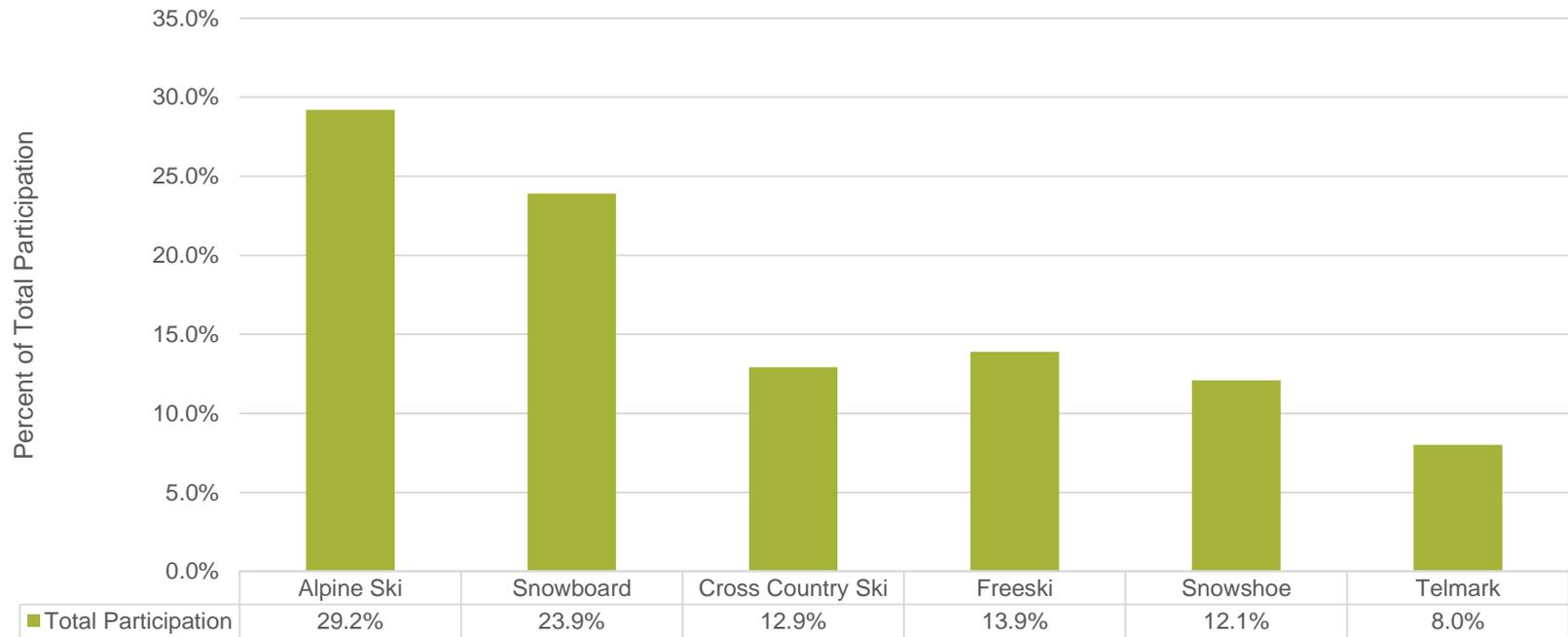
| Non-Resort Backcountry Riders | |
|------------------------------------|--|
| Total | 784,000 |
| Age | 41% under 17, 42% between 18 and 34, 17% over 35 |
| Gender | 65% Male, 35% Female |
| Bachelor's Degree or Higher | 38% |
| Region | South Atlantic & Pacific |
| Income > \$75K | 75% |



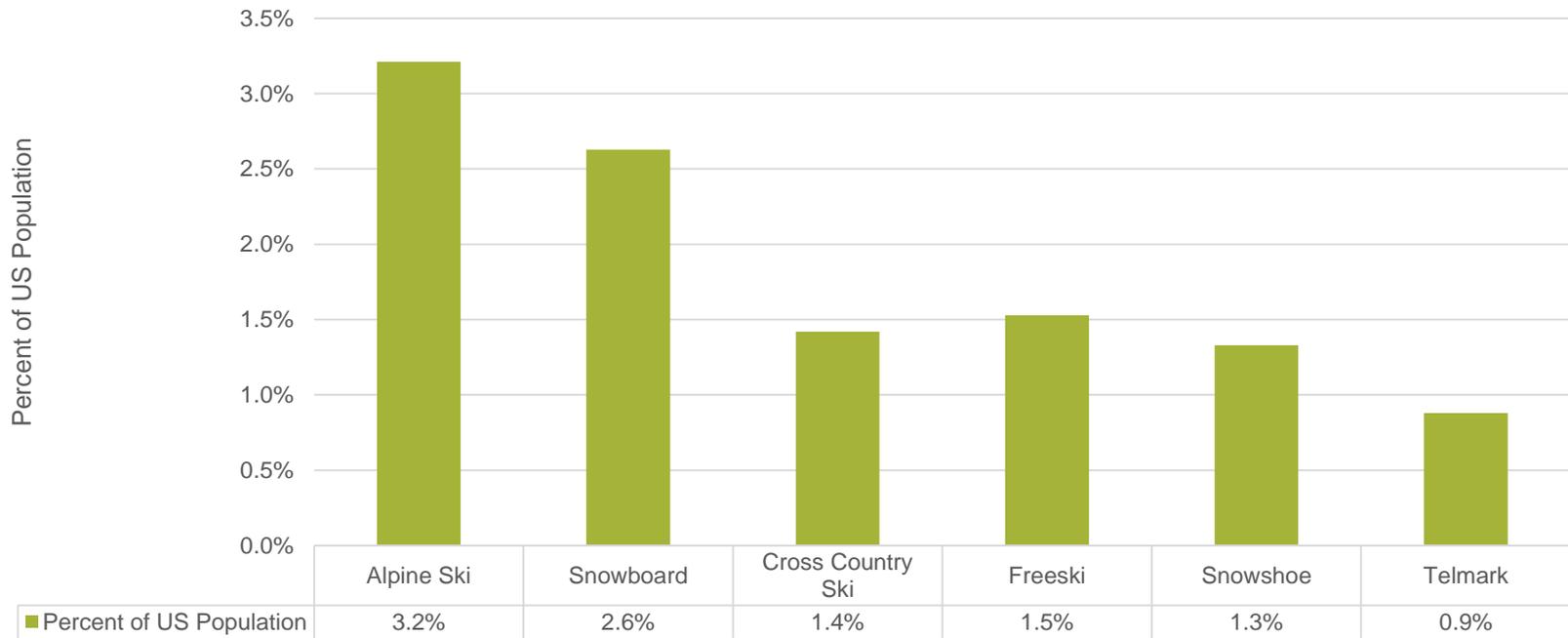
SNOW SPORTS PARTICIPATION BY DISCIPLINE



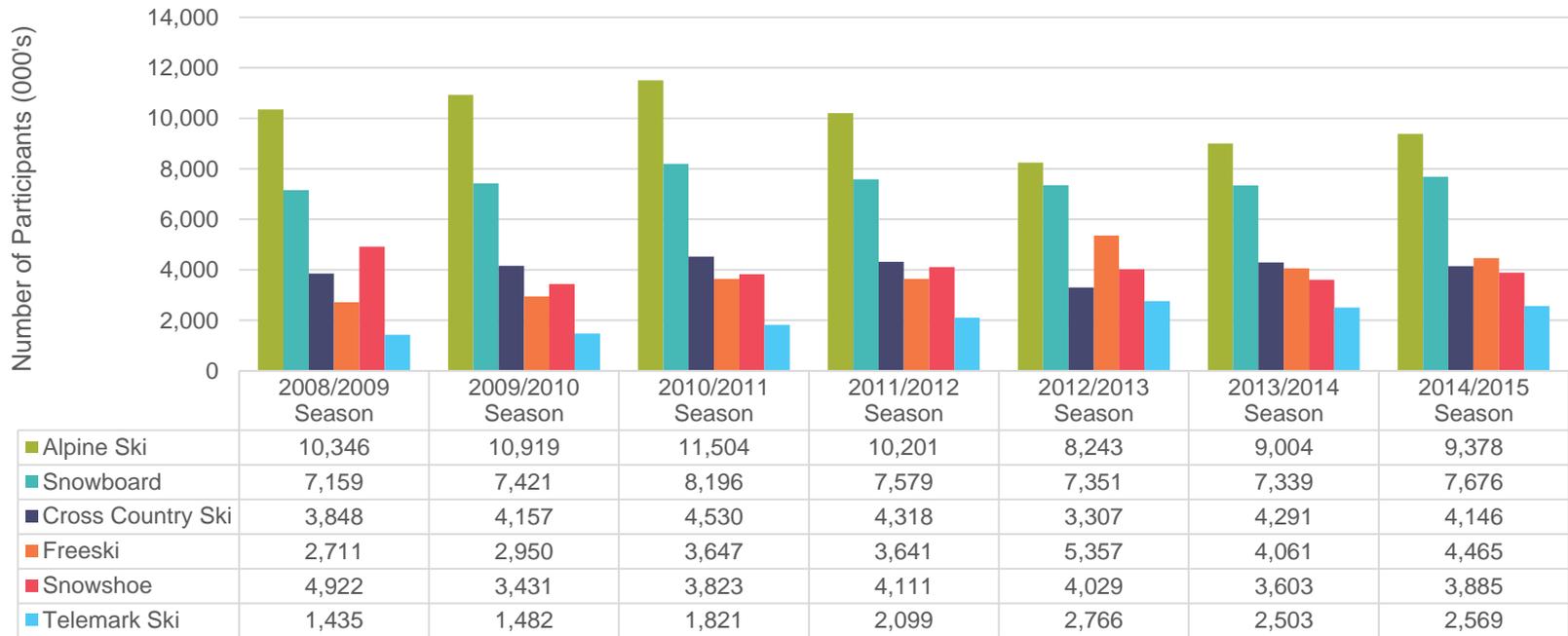
PERCENT OF TOTAL PARTICIPATION BY DISCIPLINE



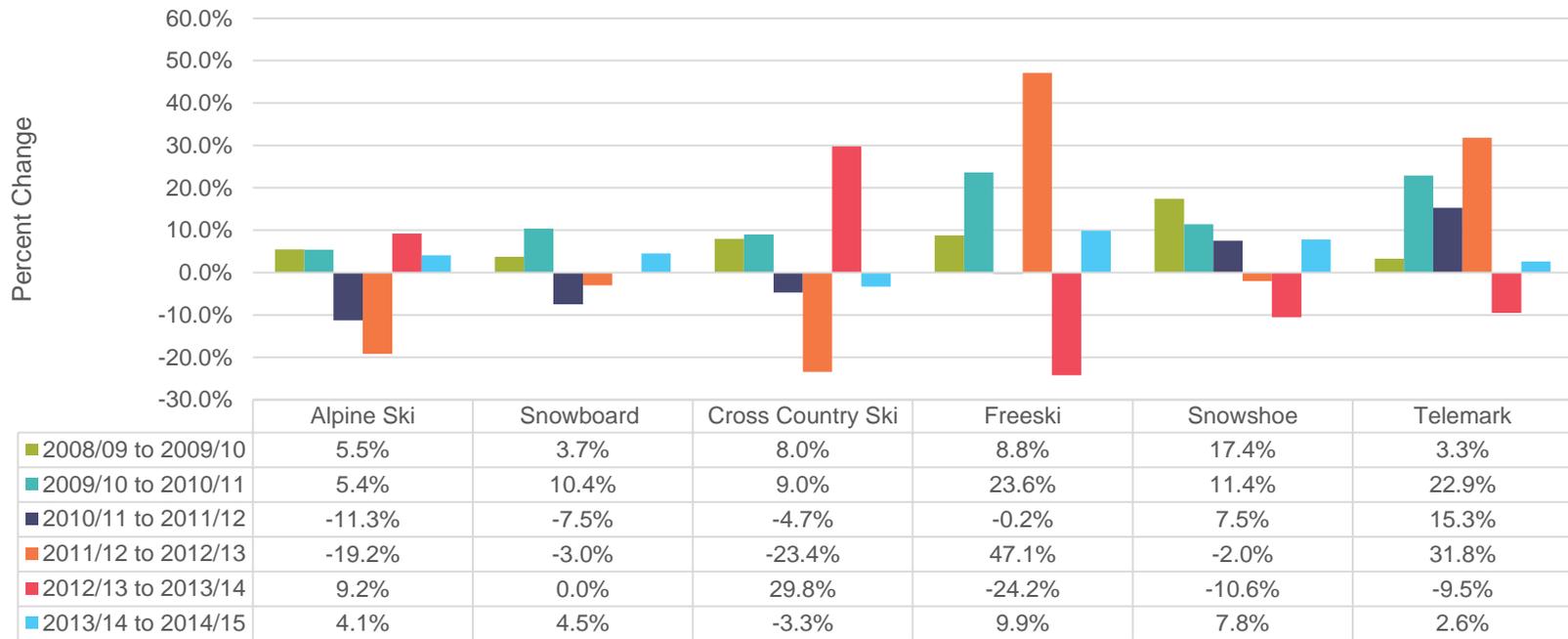
PERCENT OF US POPULATION THAT PARTICIPATES



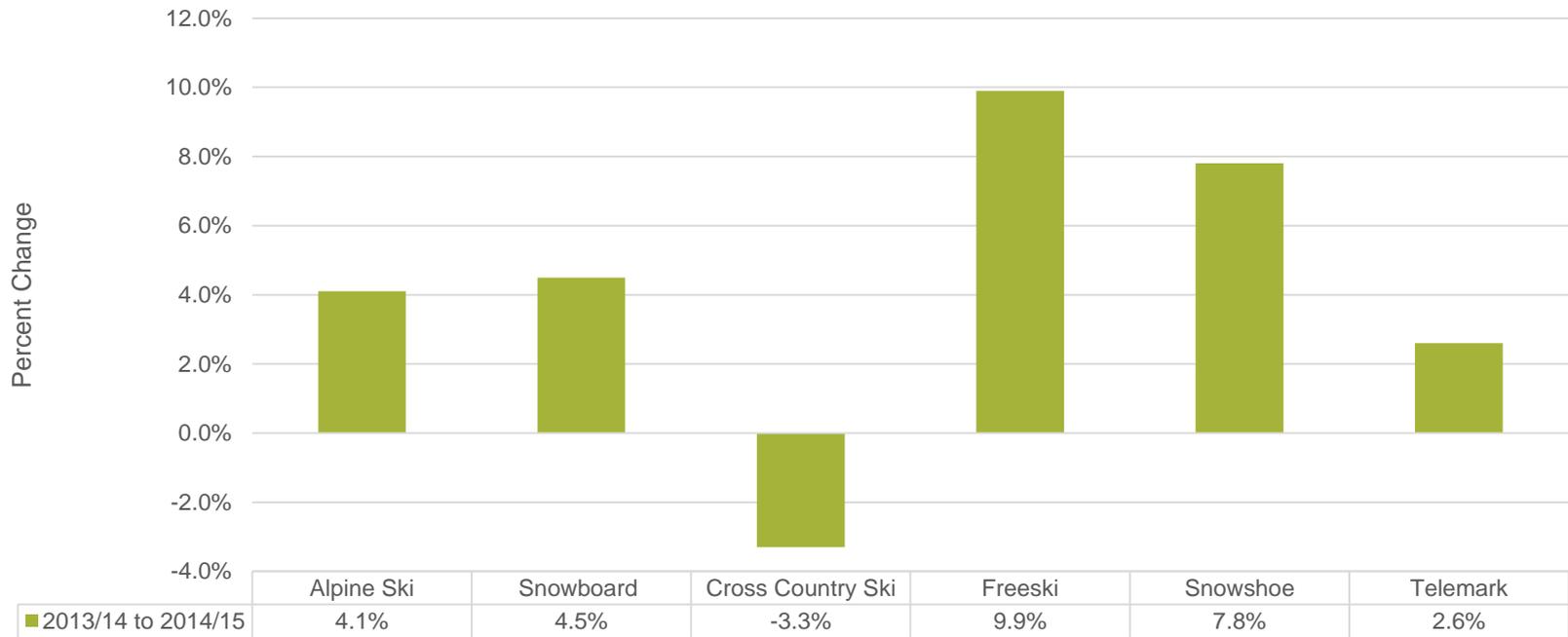
SNOW SPORTS PARTICIPATION TRENDS



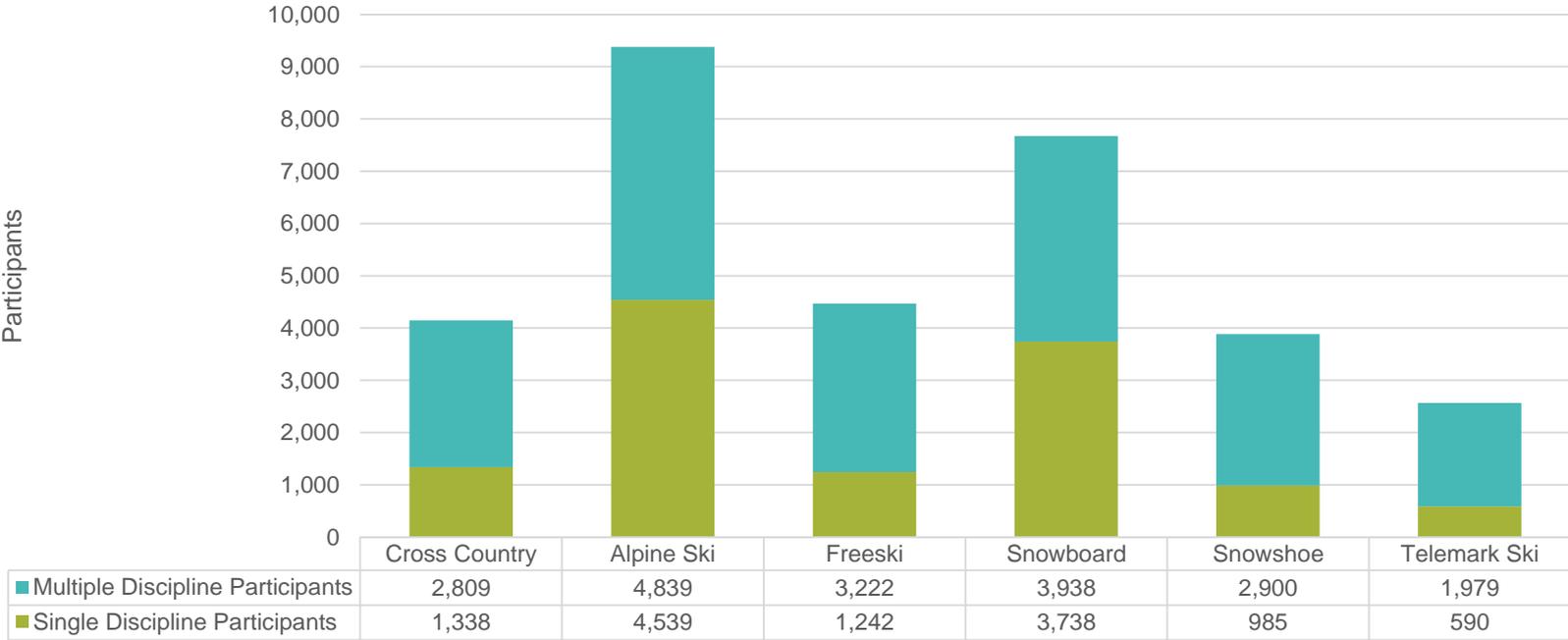
ANNUAL GROWTH RATE



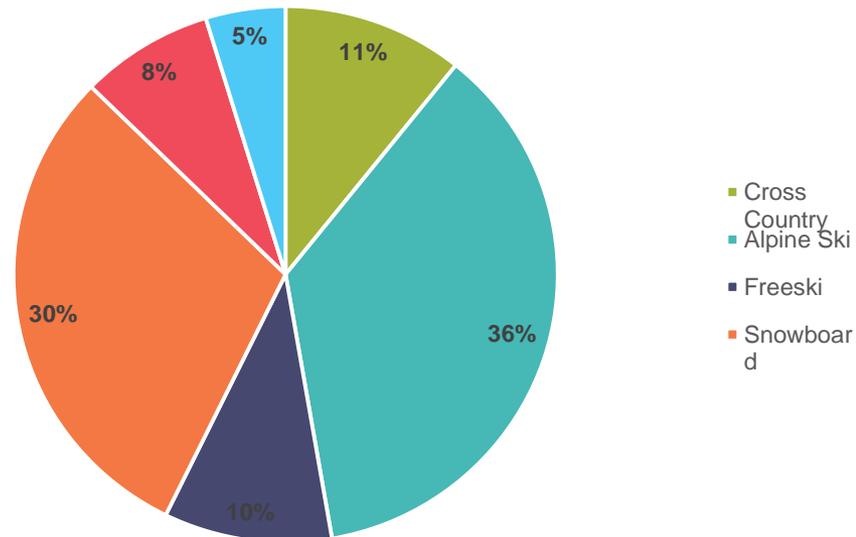
YEAR-TO-YEAR CHANGE IN PARTICIPATION



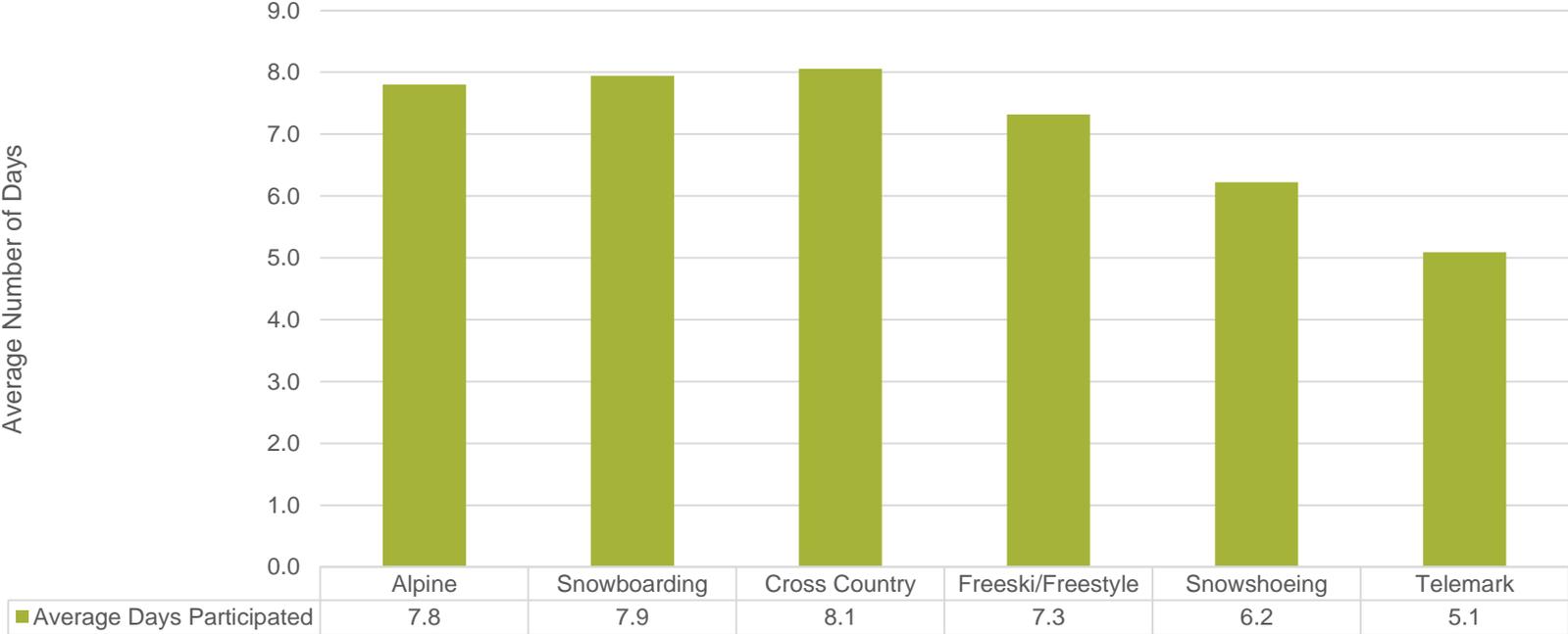
SINGLE VS. MULTI-DISCIPLINE PARTICIPANTS



SINGLE DISCIPLINE PARTICIPANTS



AVERAGE NUMBER OF DAYS PARTICIPATED

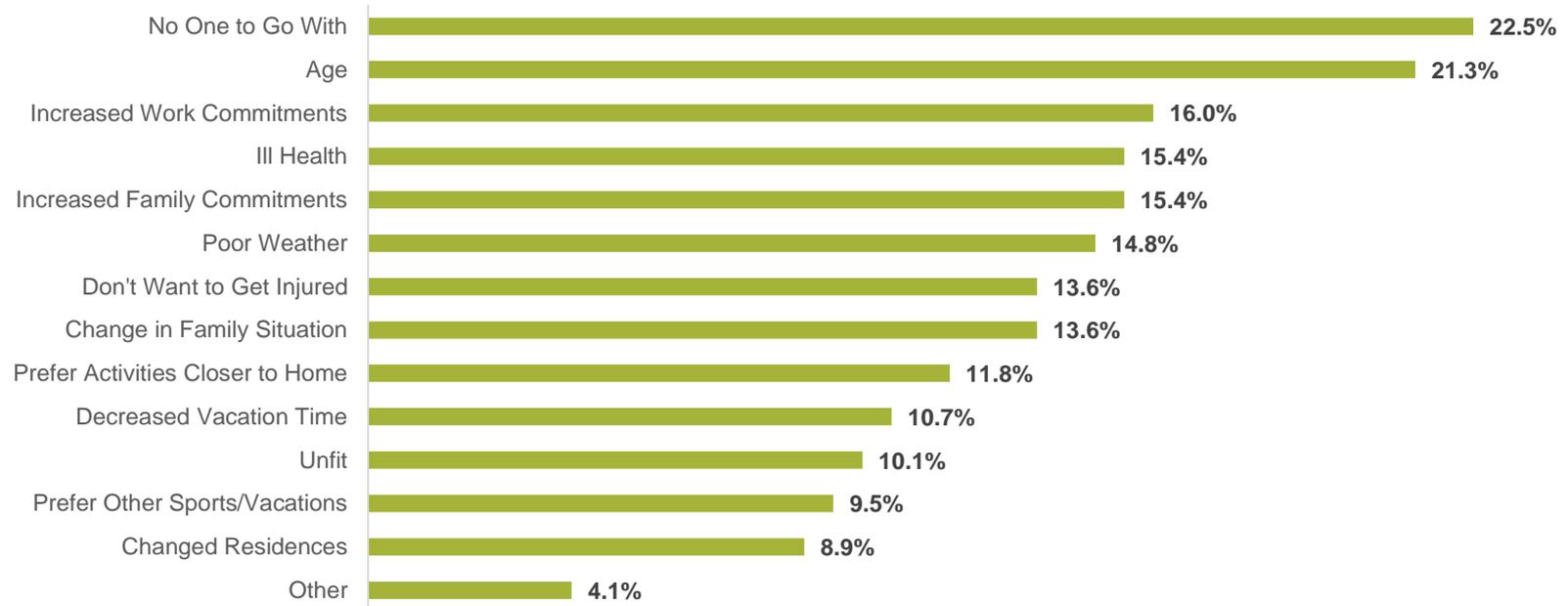


PARTICIPANTS VS. NON-PARTICIPANTS



Total projected participation for the 2014/2015 season was 19,687,000; 9,934,000 people consider themselves snow sports participants, but did not make it to the mountain this season.

REASONS FOR NOT PARTICIPATING

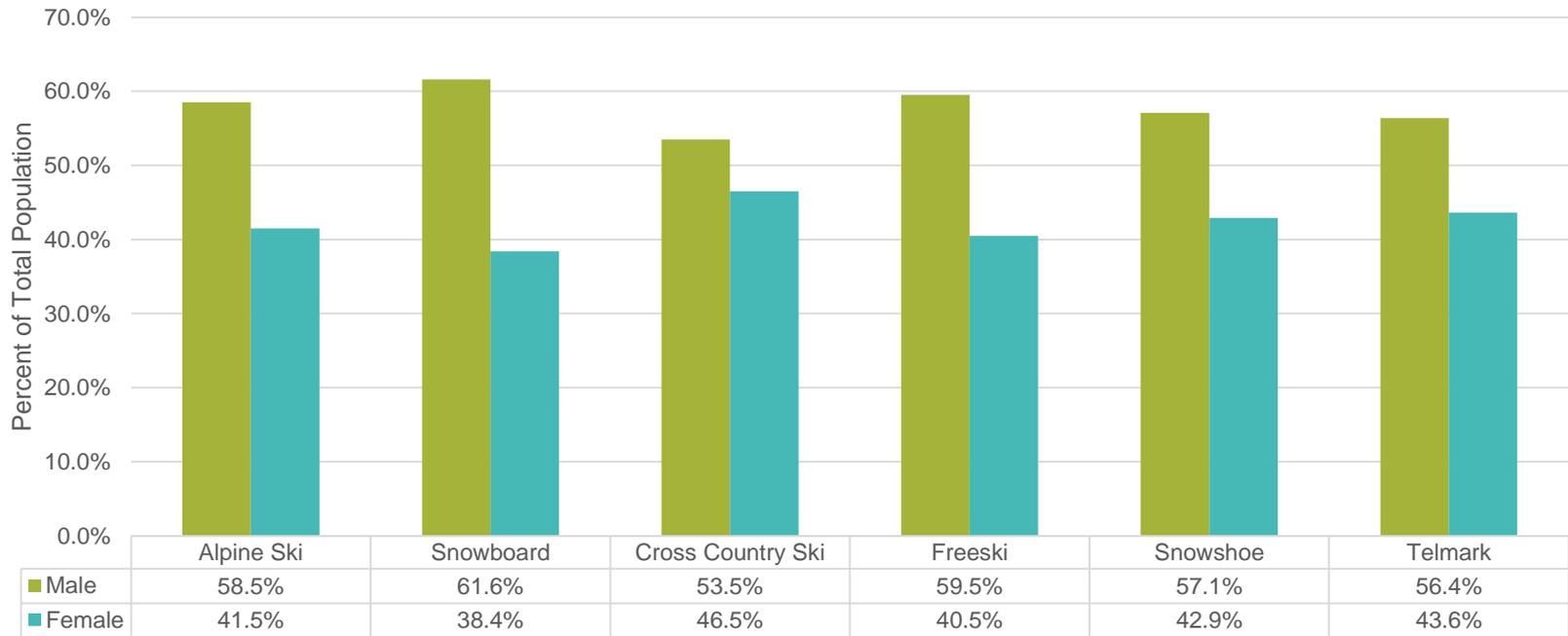


GENDER AND AGE DEMOGRAPHICS



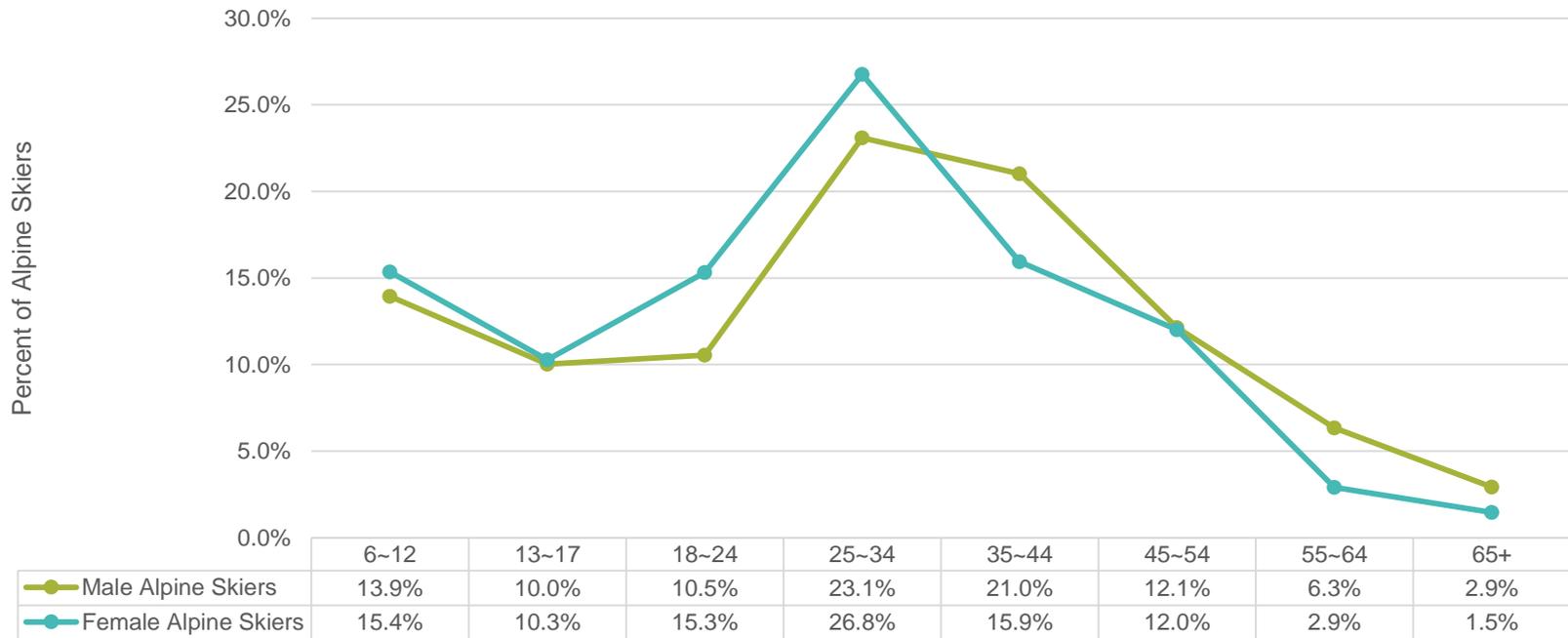
GENDER DEMOGRAPHICS

MALE VS. FEMALE BY DISCIPLINE



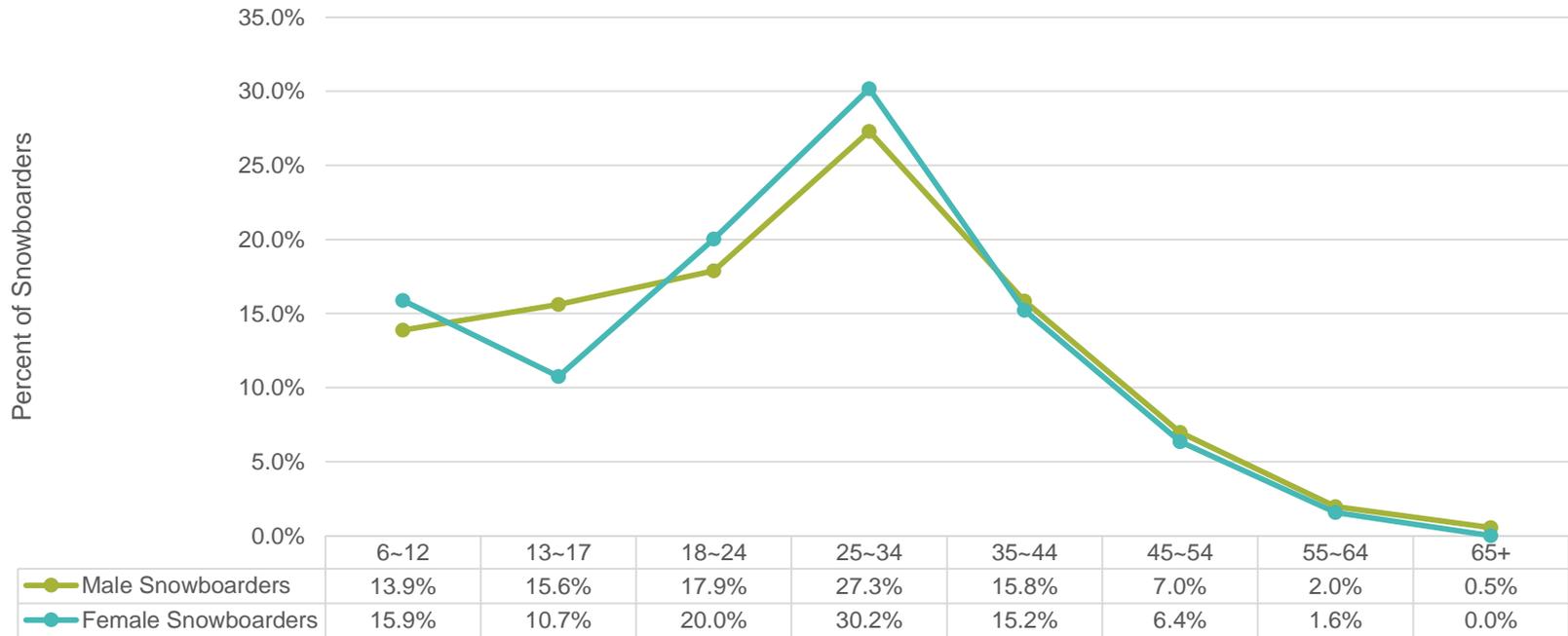
GENDER DEMOGRAPHICS

MALE VS. FEMALE ALPINE SKIERS, BY AGE



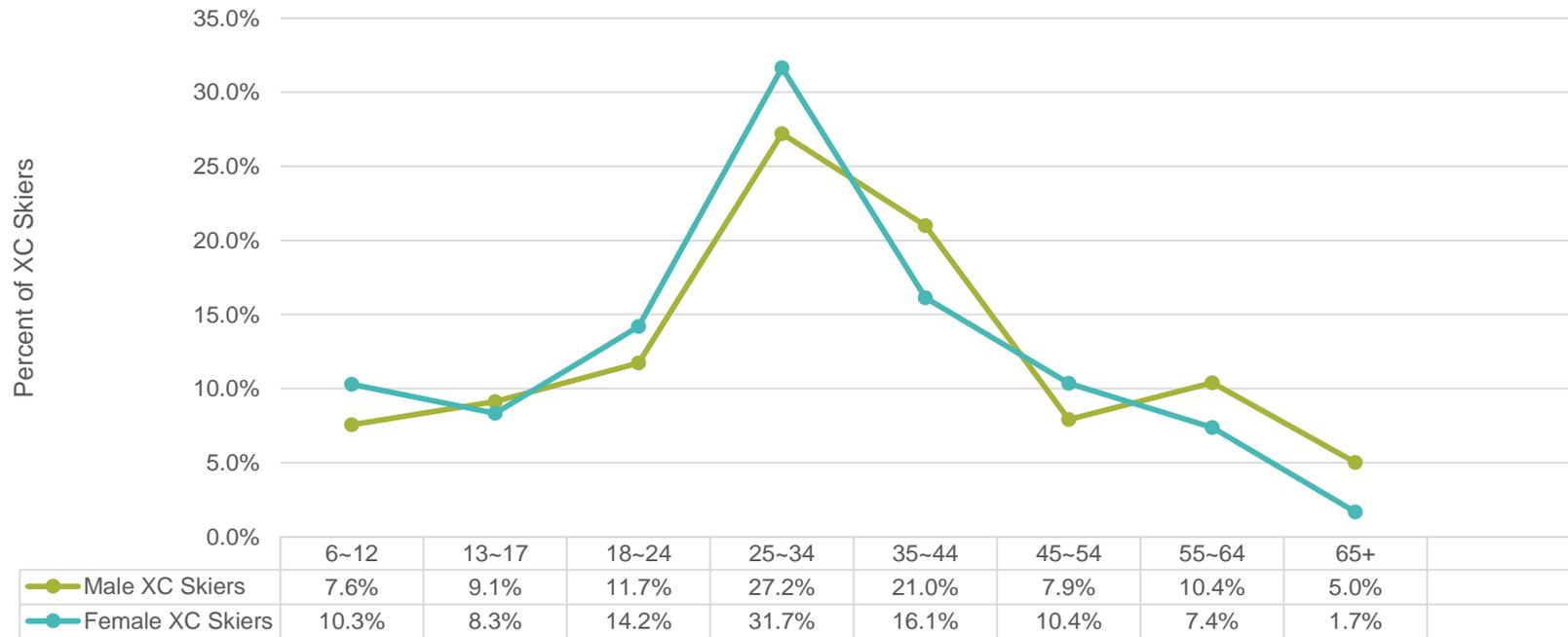
GENDER DEMOGRAPHICS

MALE VS. FEMALE SNOWBOARDERS, BY AGE



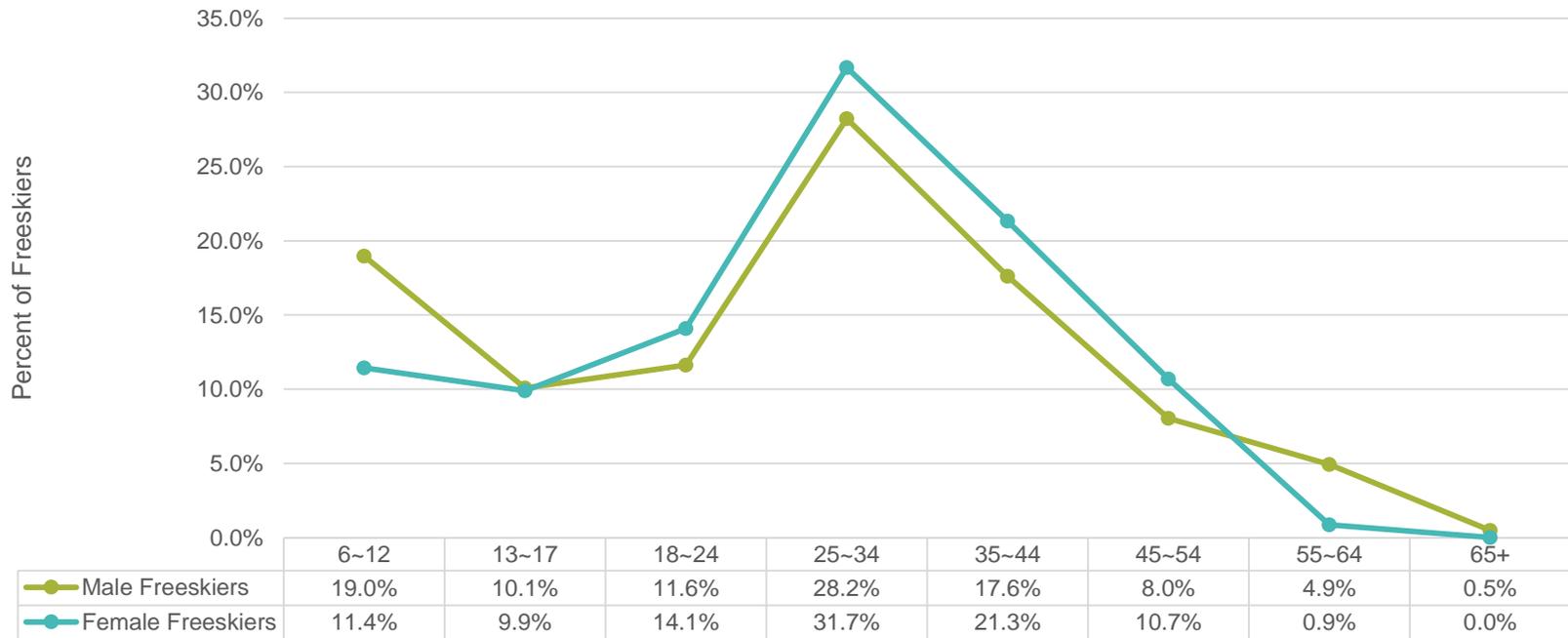
GENDER DEMOGRAPHICS

MALE VS. FEMALE CROSS COUNTRY SKIERS, BY AGE

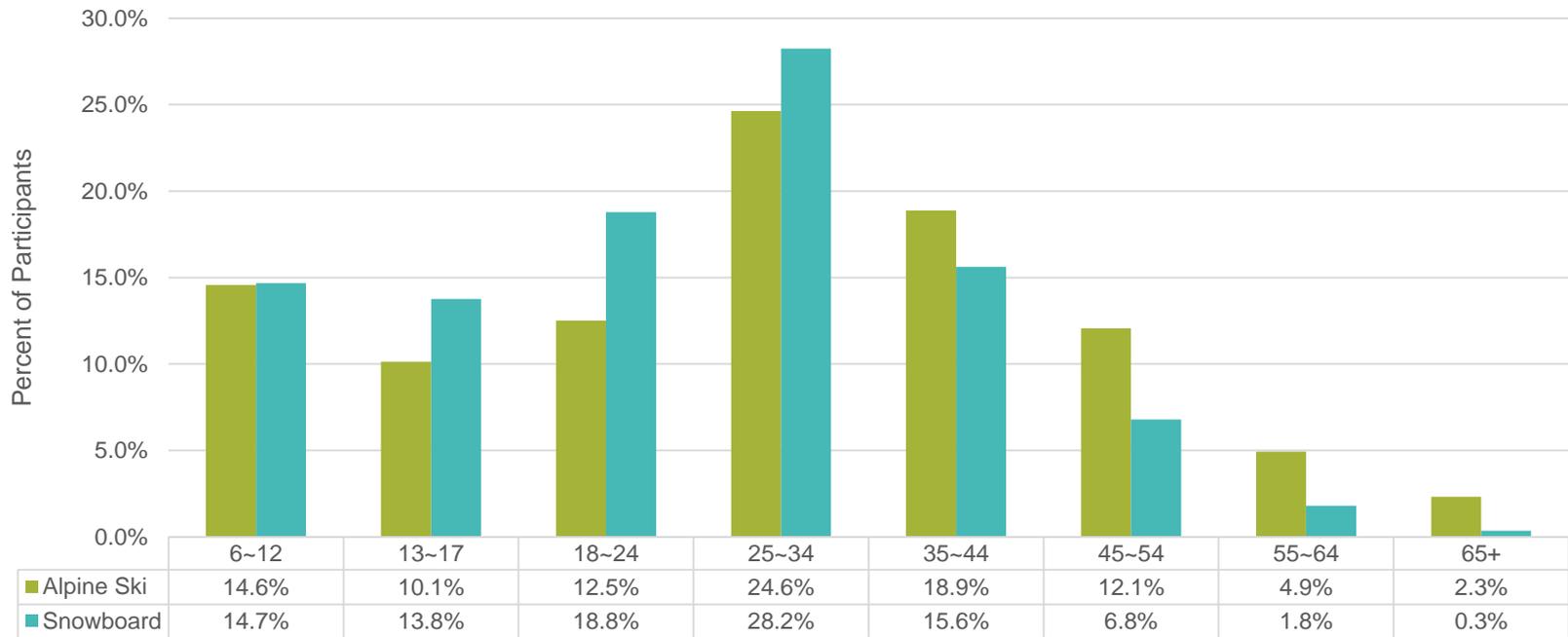


GENDER DEMOGRAPHICS

MALE VS. FEMALE FREESKIERS, BY AGE

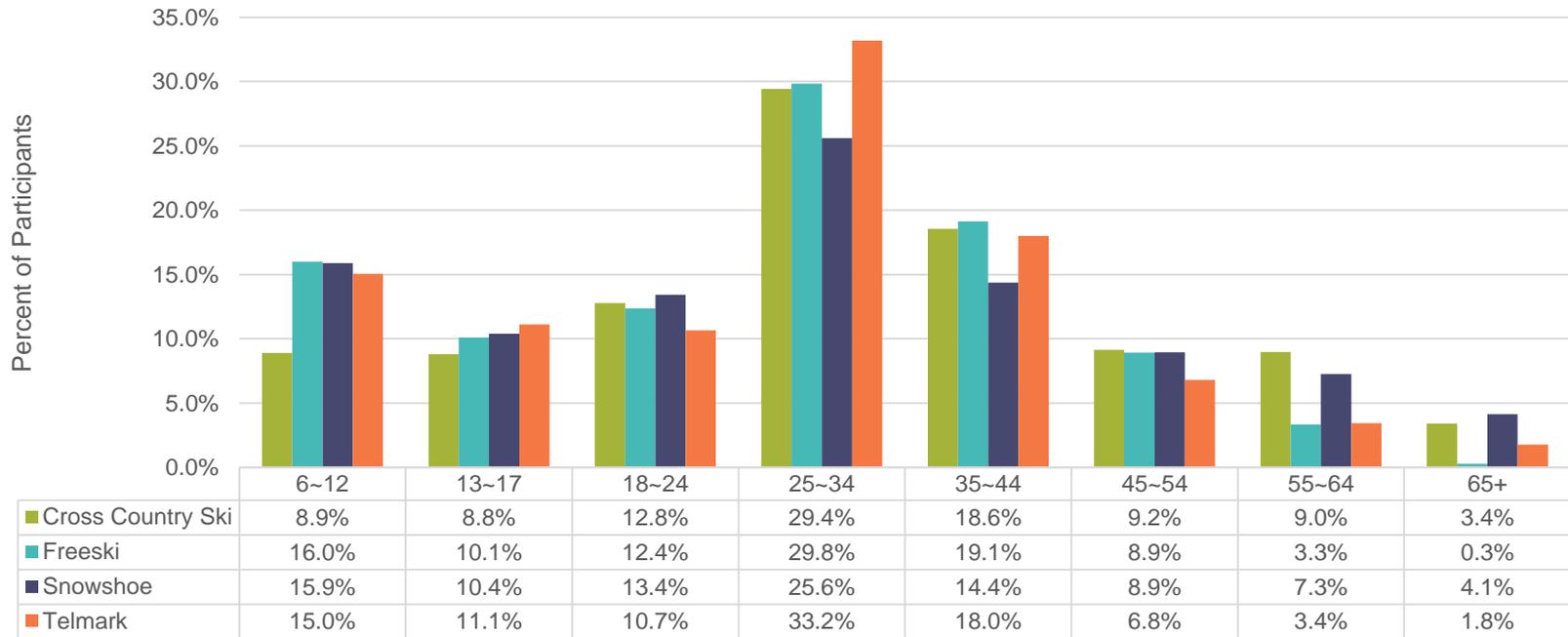


AGE DEMOGRAPHICS SKI VS. SNOWBOARD



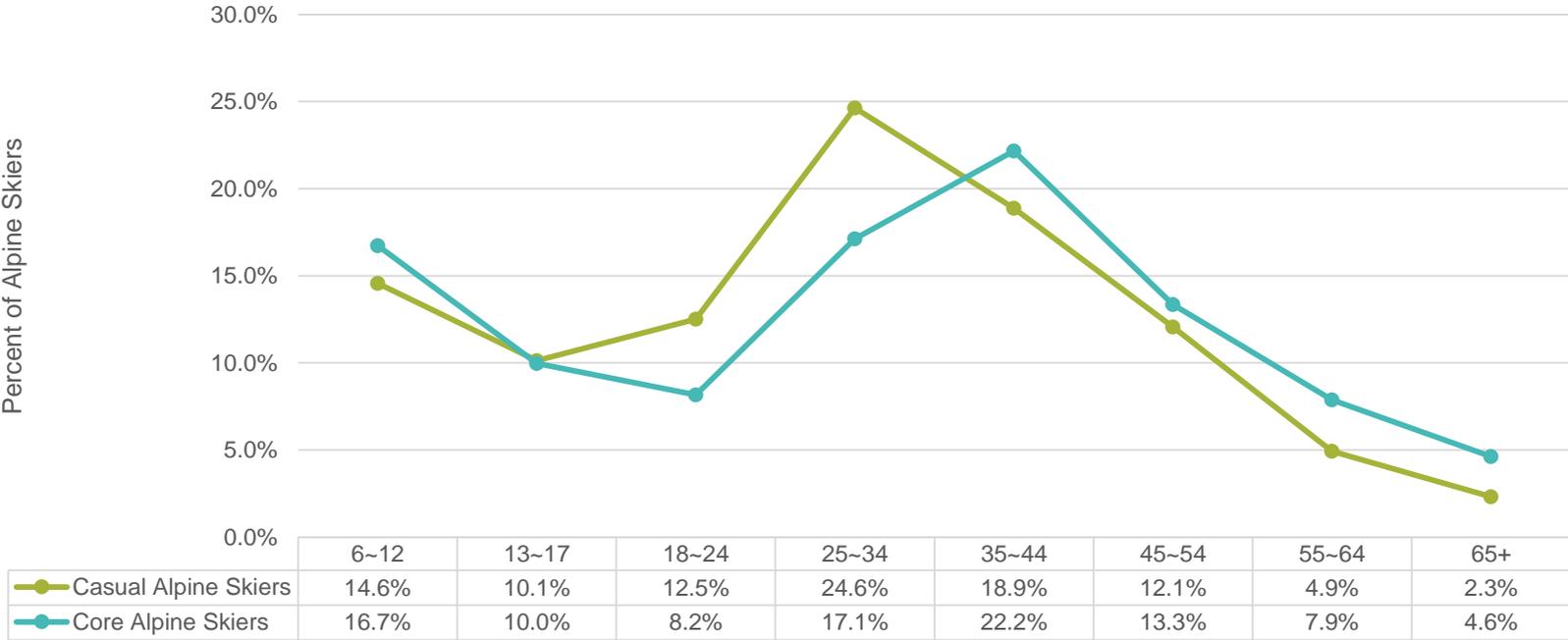
AGE DEMOGRAPHICS

CROSS COUNTRY, FREESKI, SNOWSHOE & TELEMAR



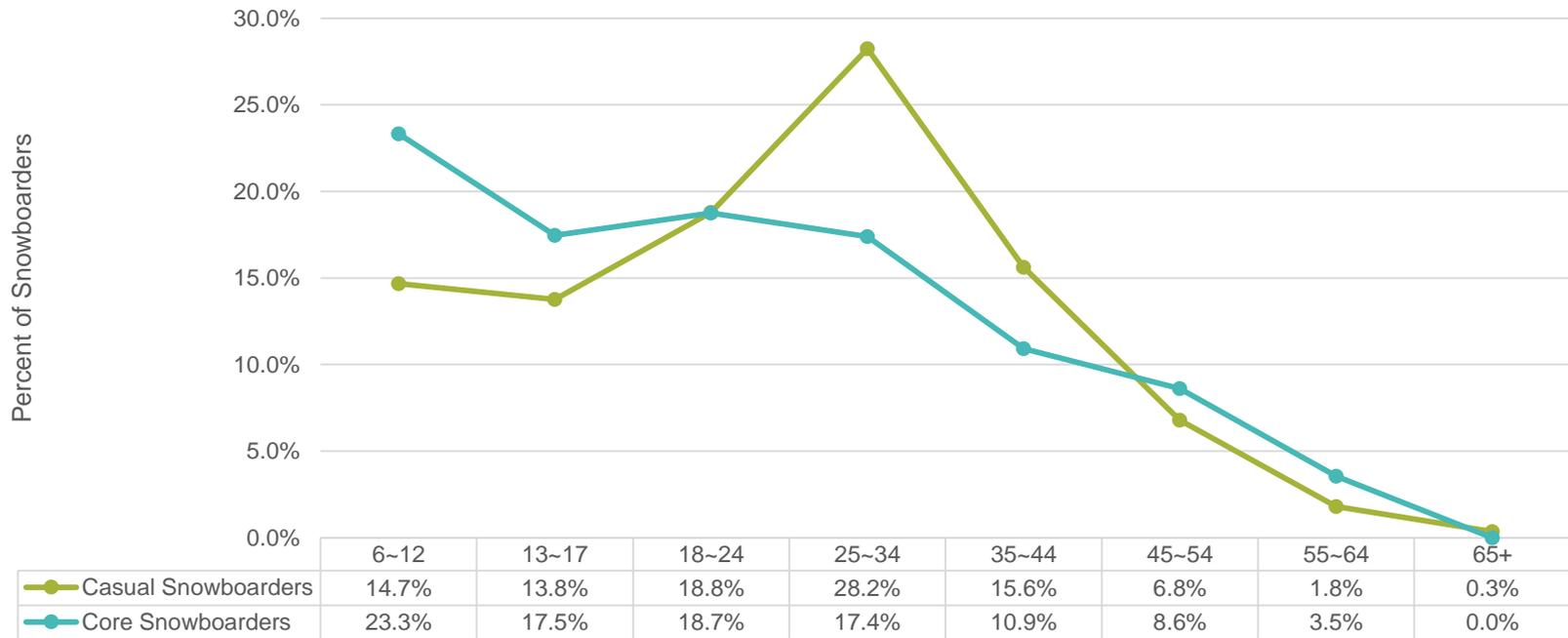
AGE DEMOGRAPHICS

CASUAL VS. CORE ALPINE SKIERS



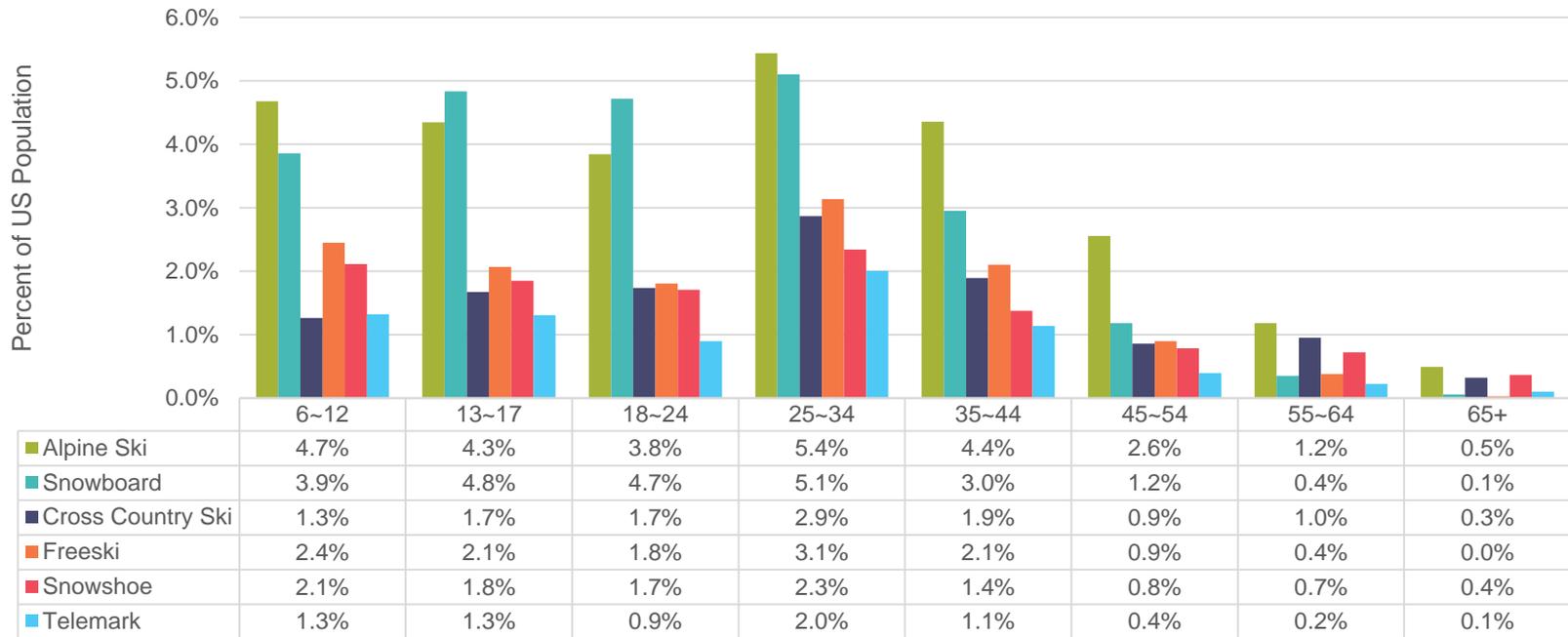
AGE DEMOGRAPHICS

CASUAL VS. CORE SNOWBOARDERS



AGE DEMOGRAPHICS

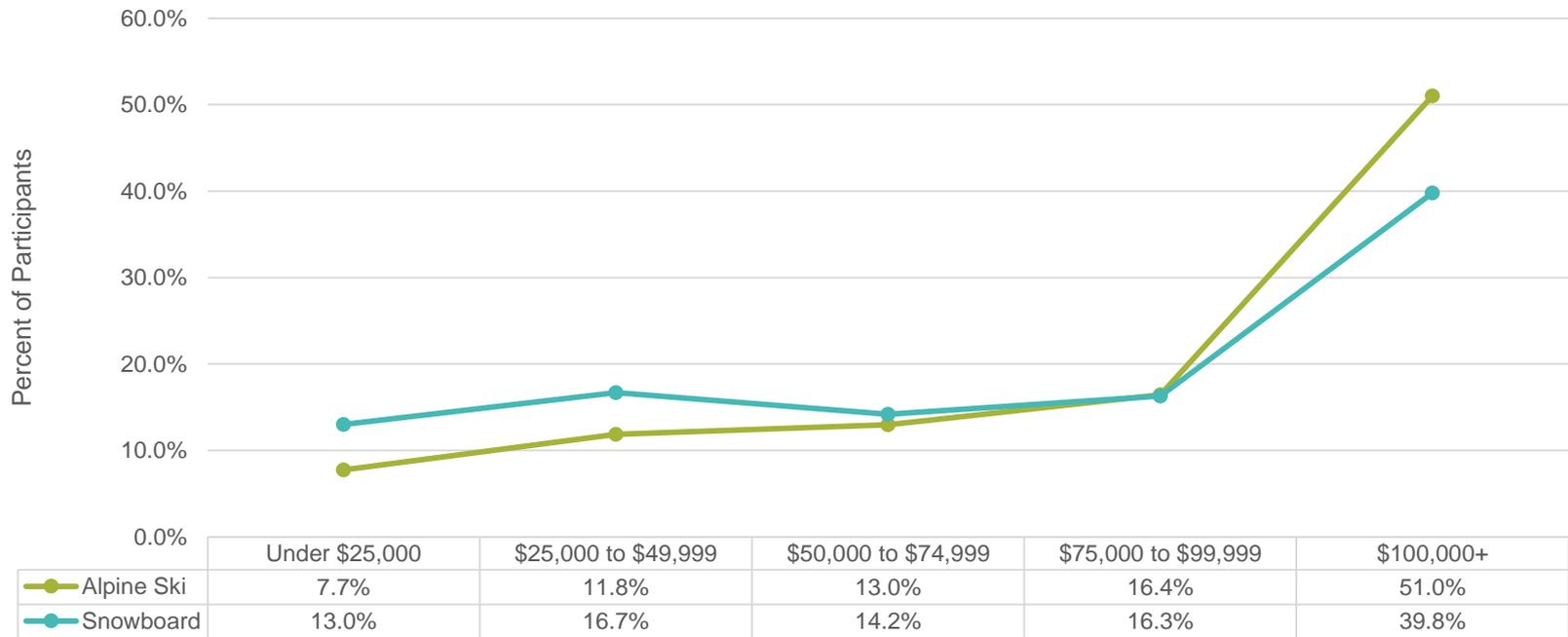
PERCENT OF POPULATION THAT PARTICIPATES



INCOME & EDUCATION DEMOGRAPHICS

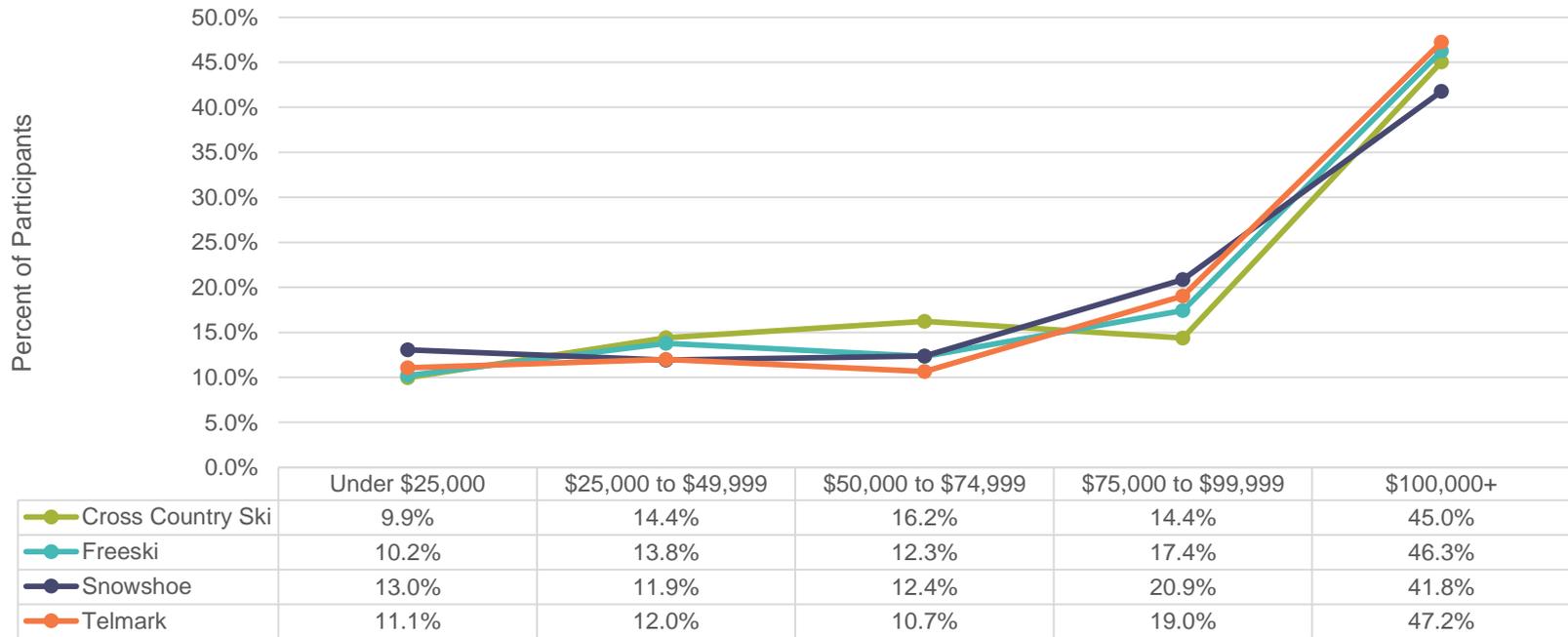


INCOME DEMOGRAPHICS ALPINE VS. SNOWBOARD



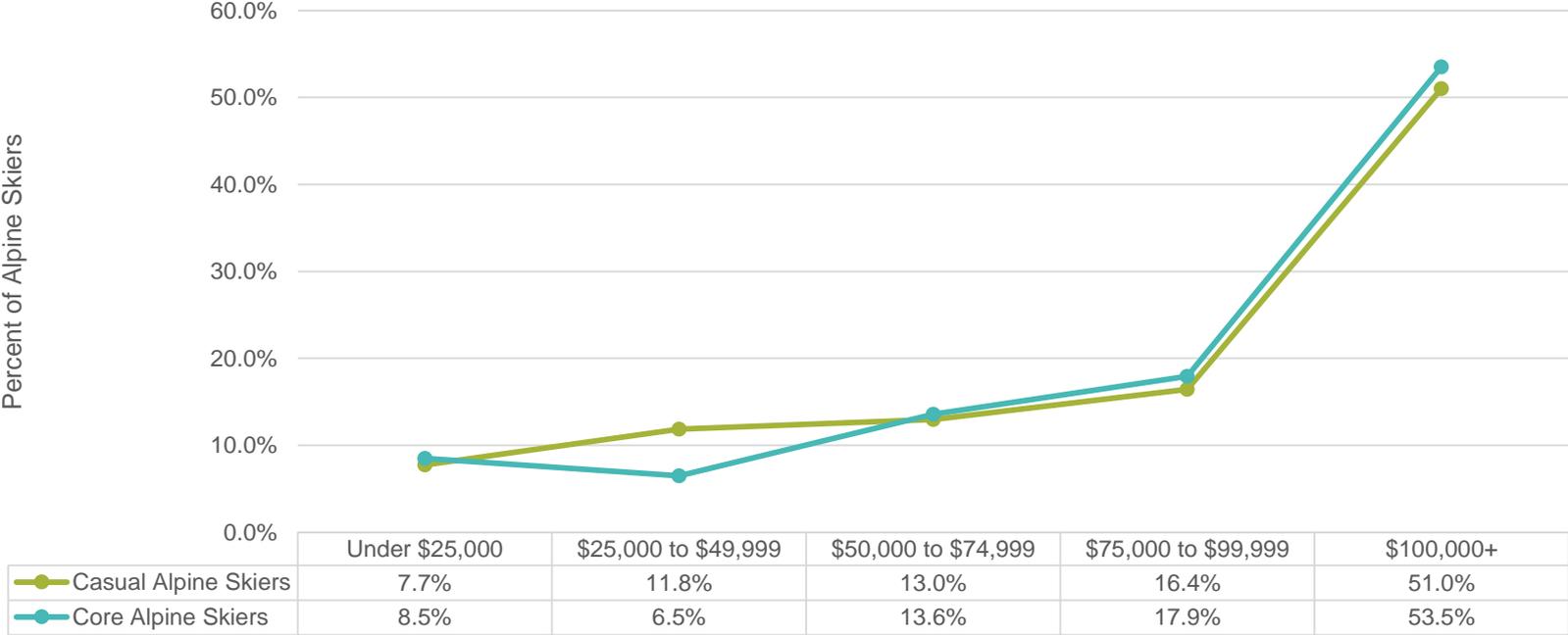
INCOME DEMOGRAPHICS

CROSS COUNTRY, FREESKI, SNOWSHOE & TELEMAR



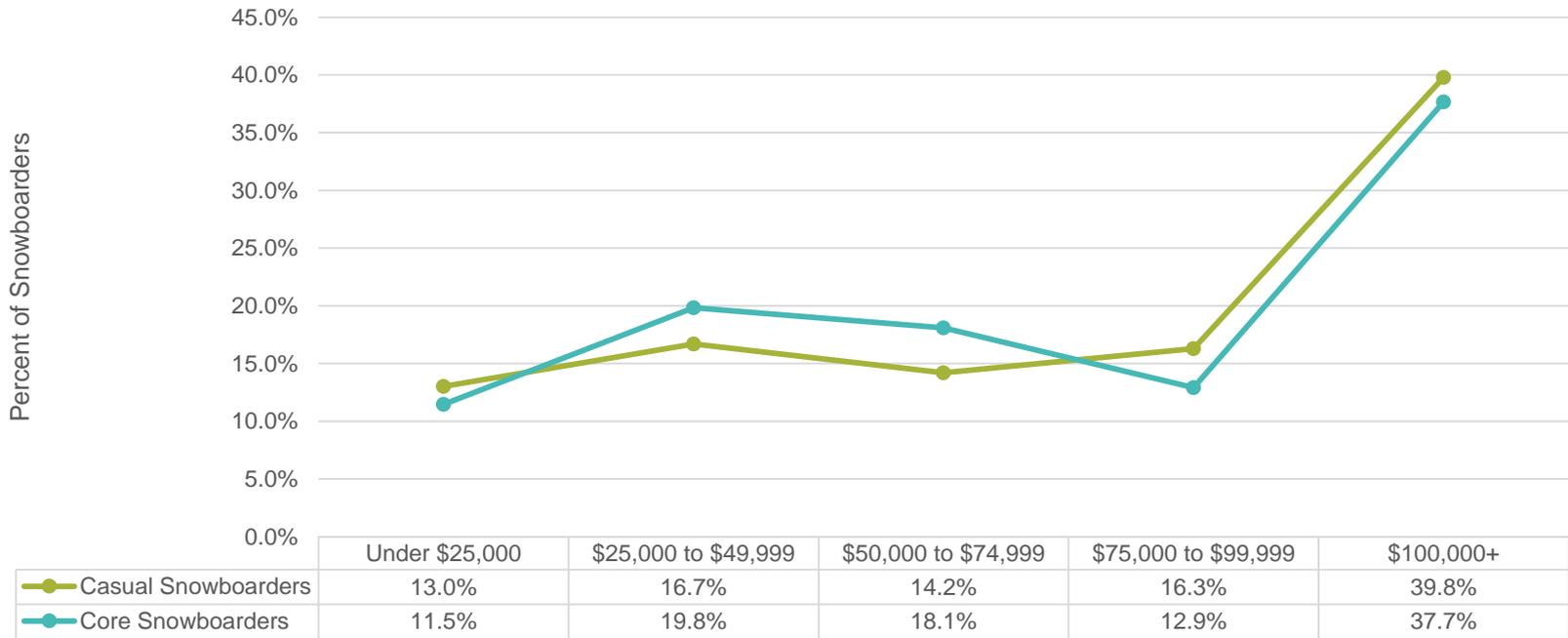
INCOME DEMOGRAPHICS

CASUAL VS. CORE ALPINE SKIERS



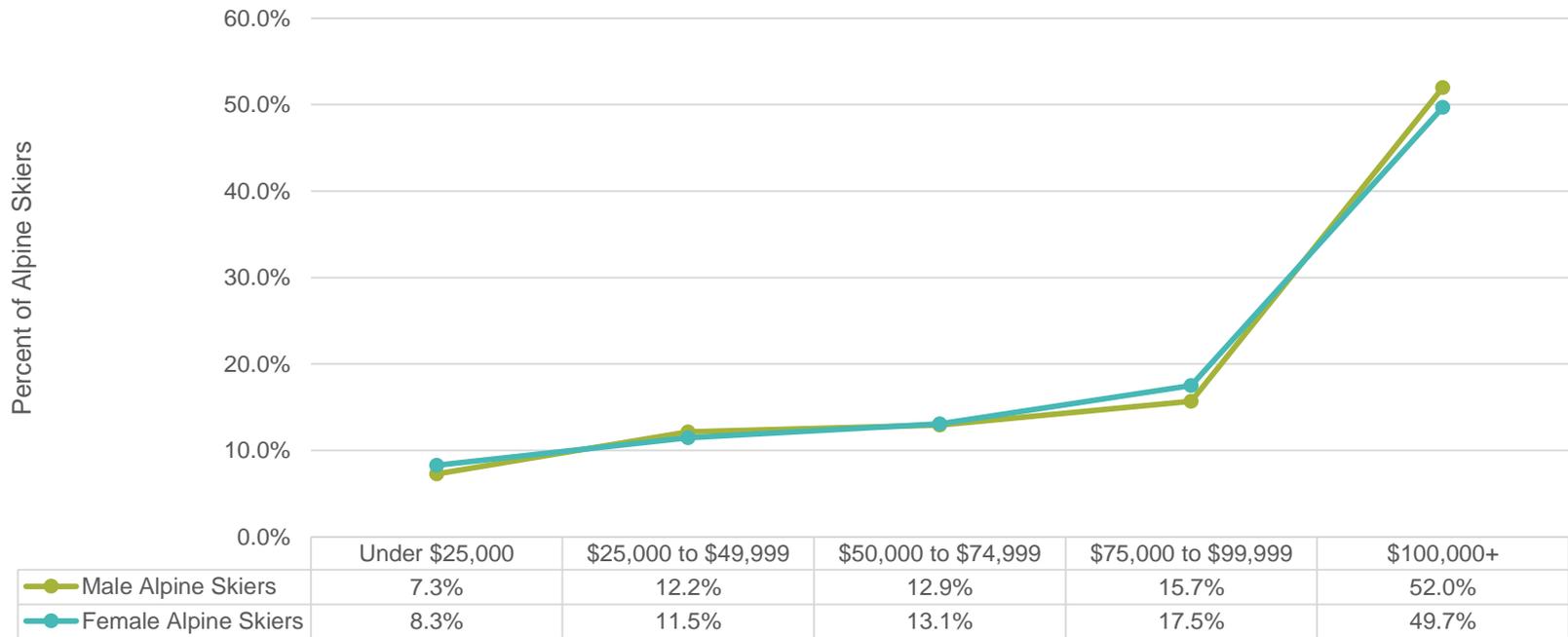
INCOME DEMOGRAPHICS

CASUAL VS. CORE SNOWBOARDERS

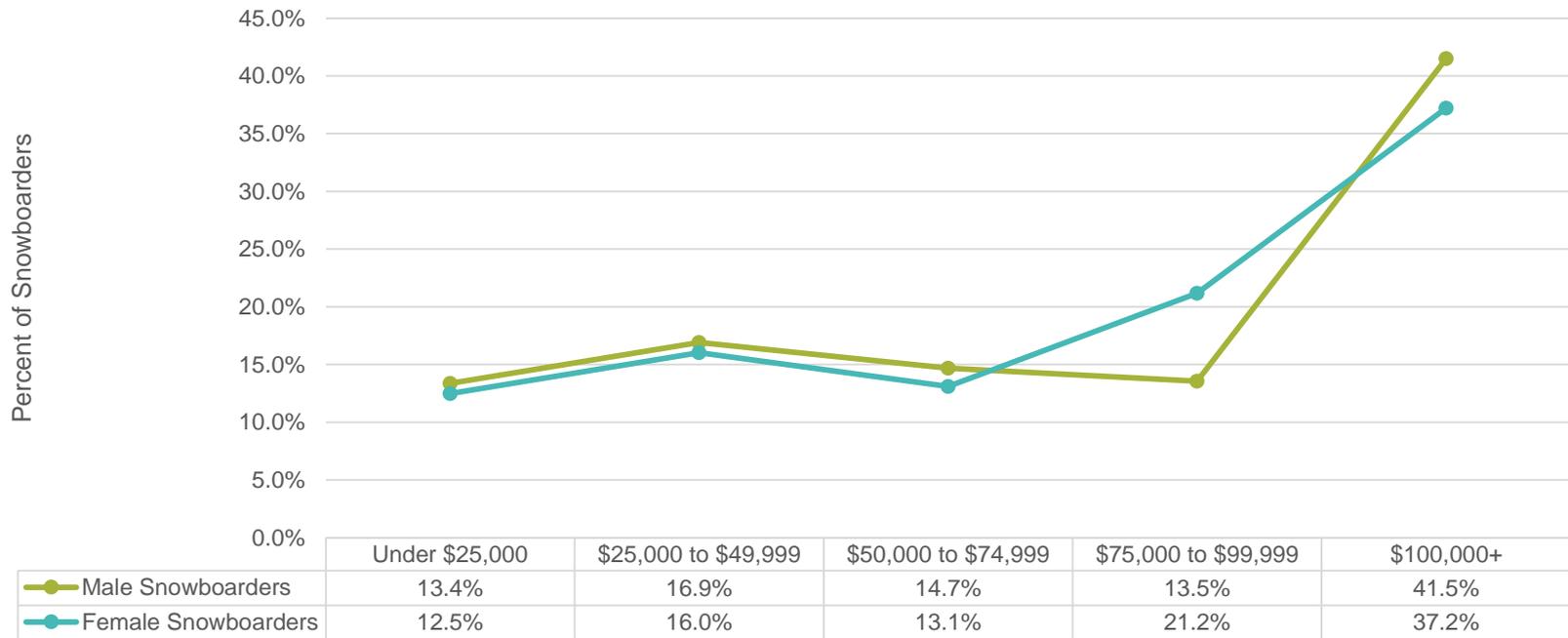


INCOME DEMOGRAPHICS

ALPINE SKIERS BY GENDER

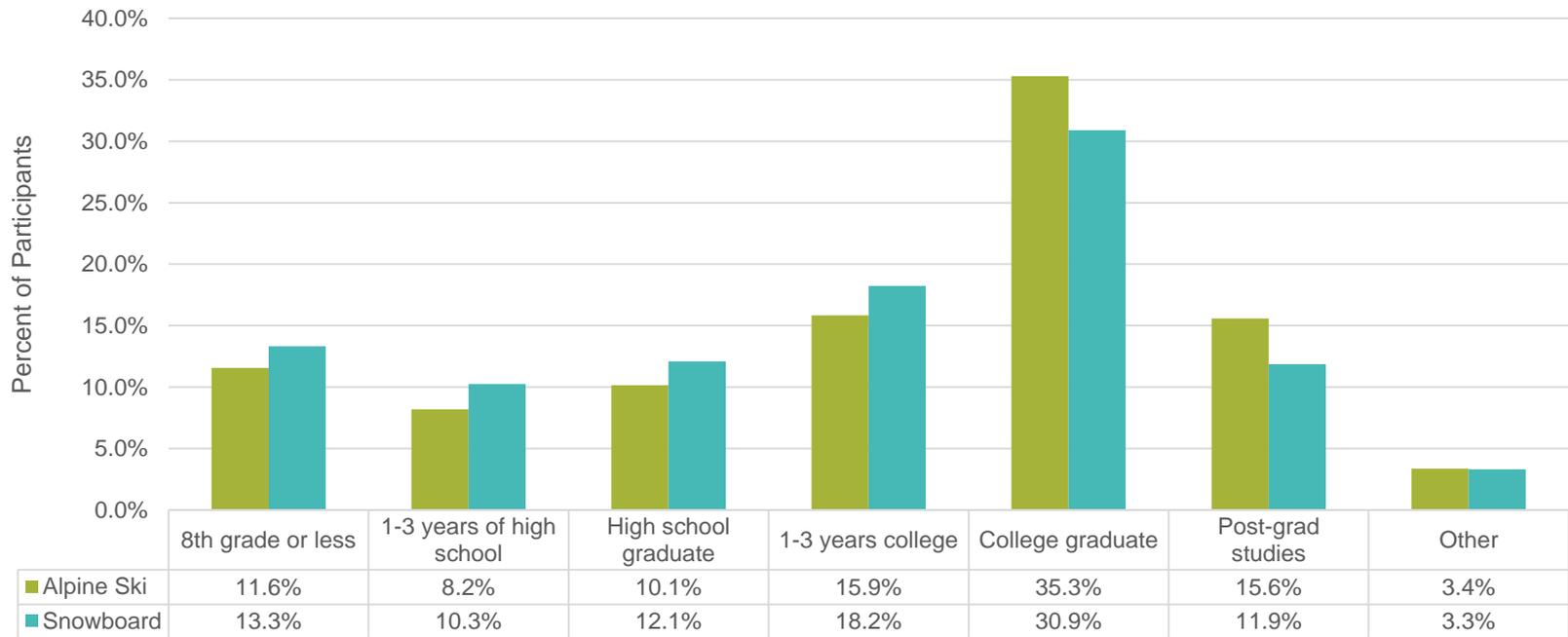


INCOME DEMOGRAPHICS SNOWBOARDERS BY GENDER



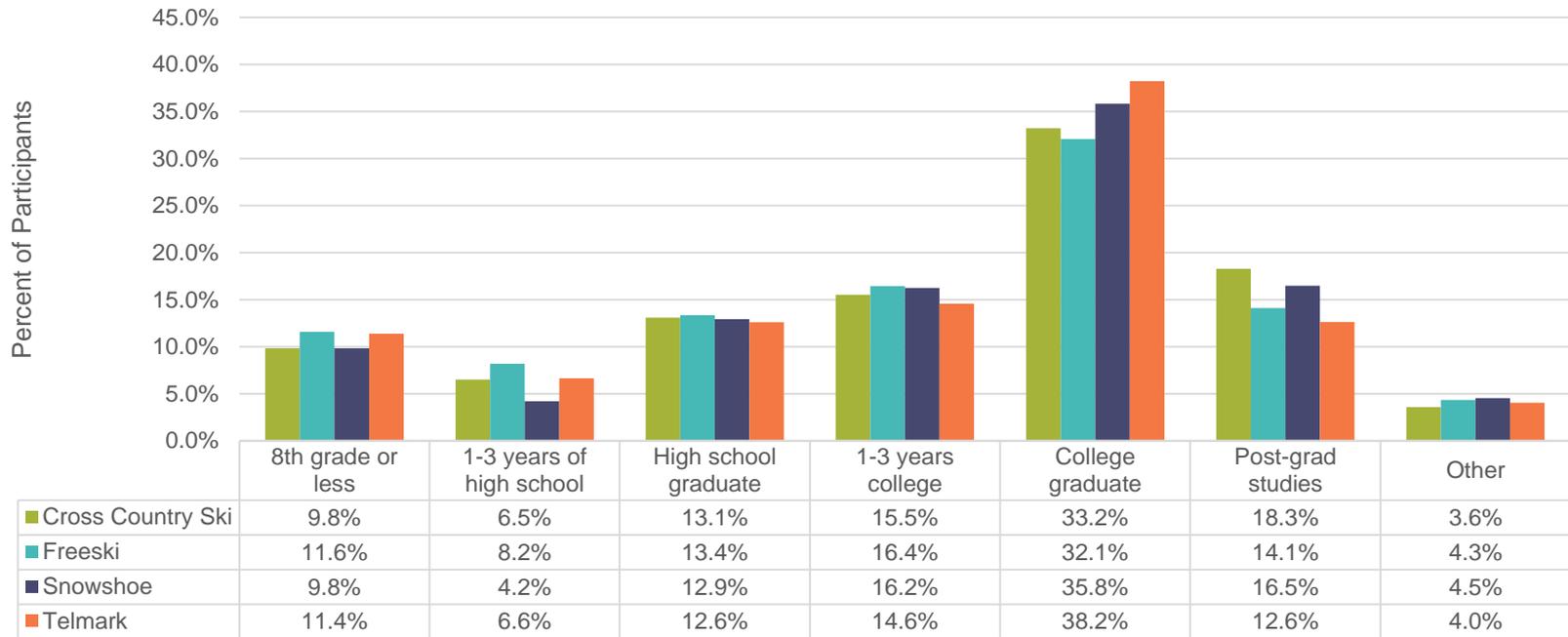
EDUCATION DEMOGRAPHICS

ALPINE VS. SNOWBOARD



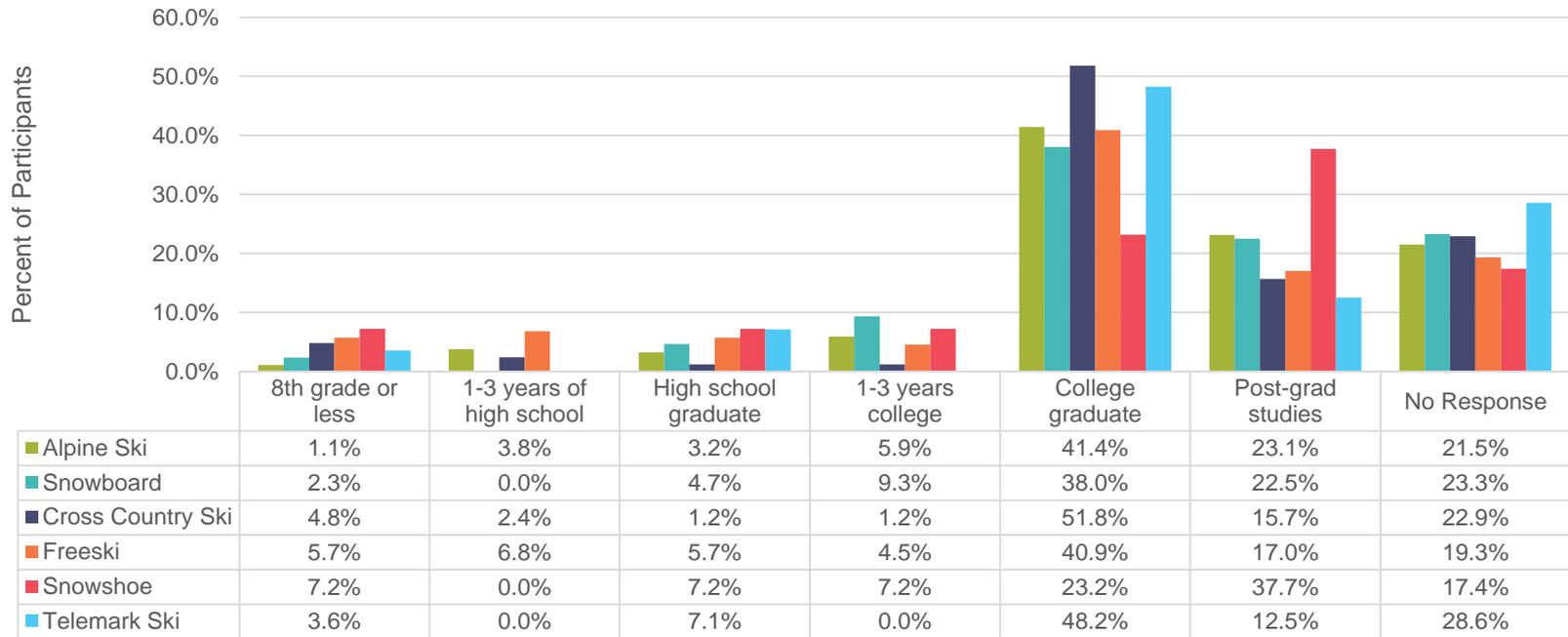
EDUCATION DEMOGRAPHICS

CROSS COUNTRY, FREESKI, SNOWSHOE & TELEMAR



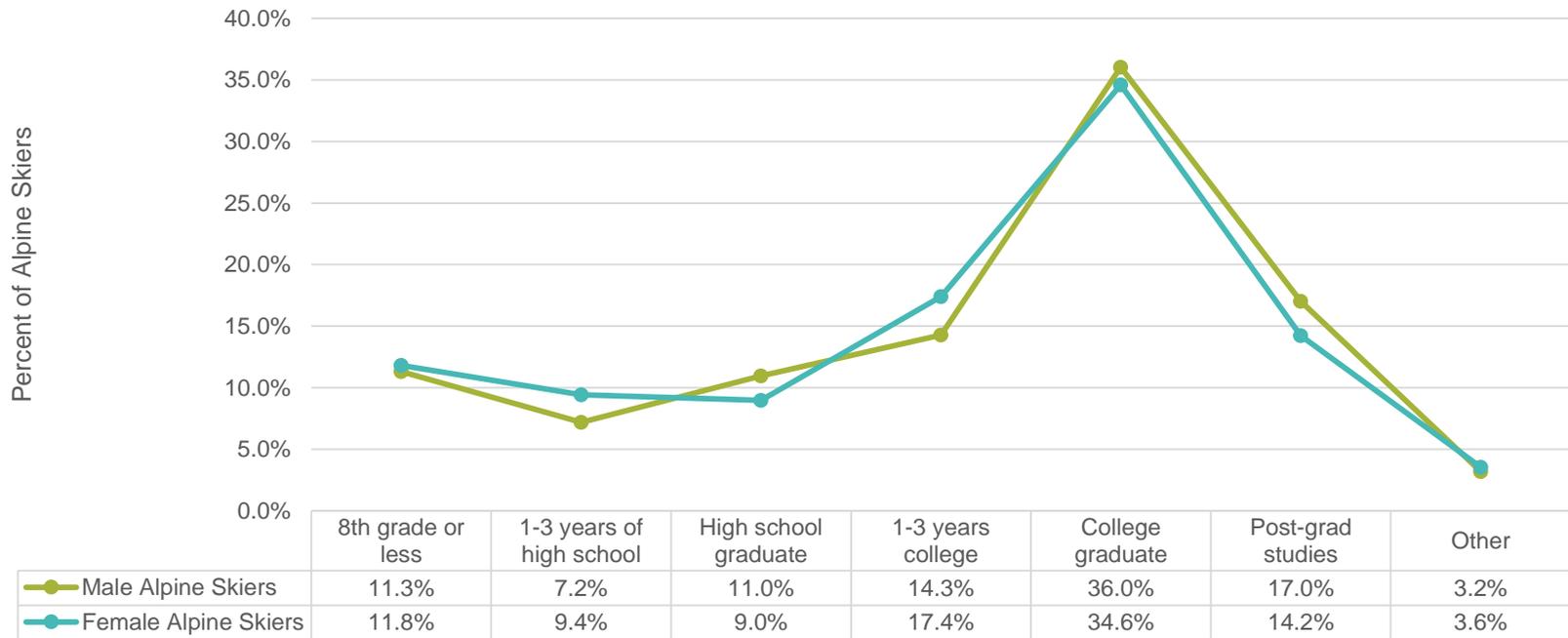
EDUCATION DEMOGRAPHICS

PARTICIPANTS 25+, BY SPORT



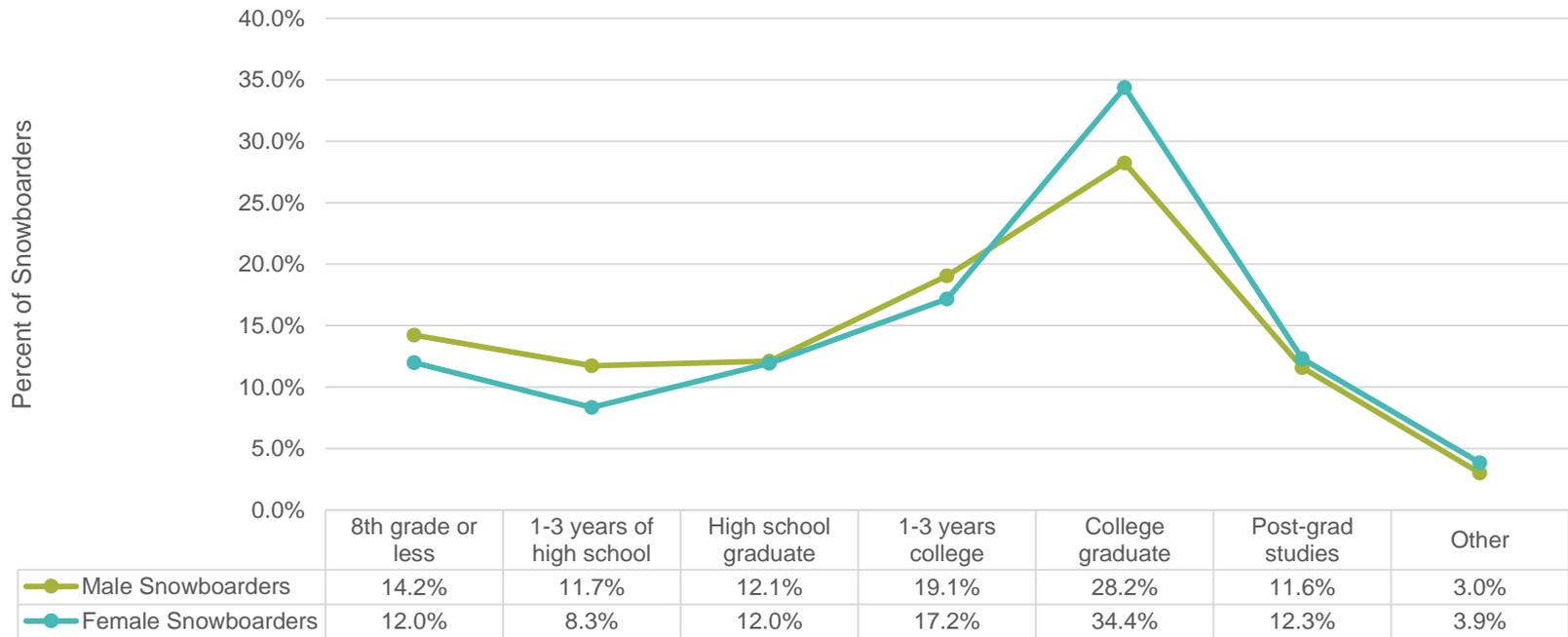
EDUCATION DEMOGRAPHICS

ALPINE SKIERS BY GENDER



EDUCATION DEMOGRAPHICS

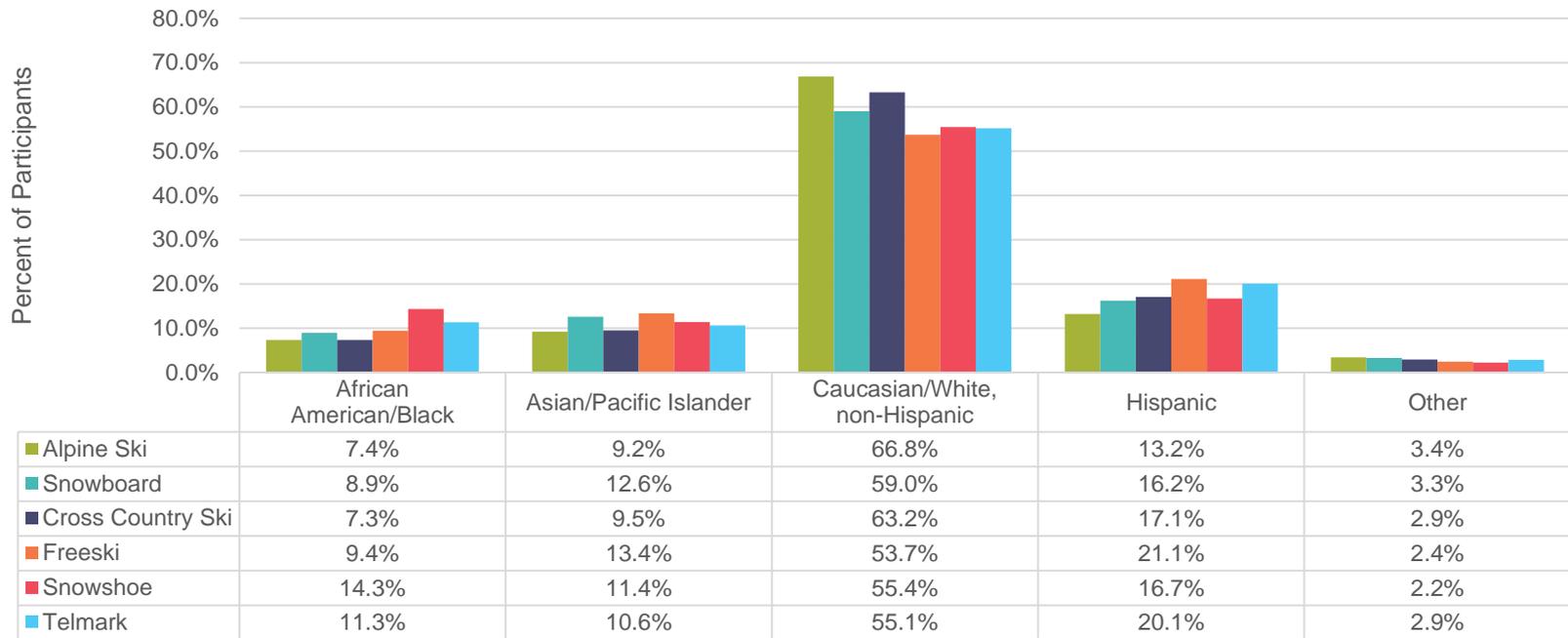
SNOWBOARDERS BY GENDER



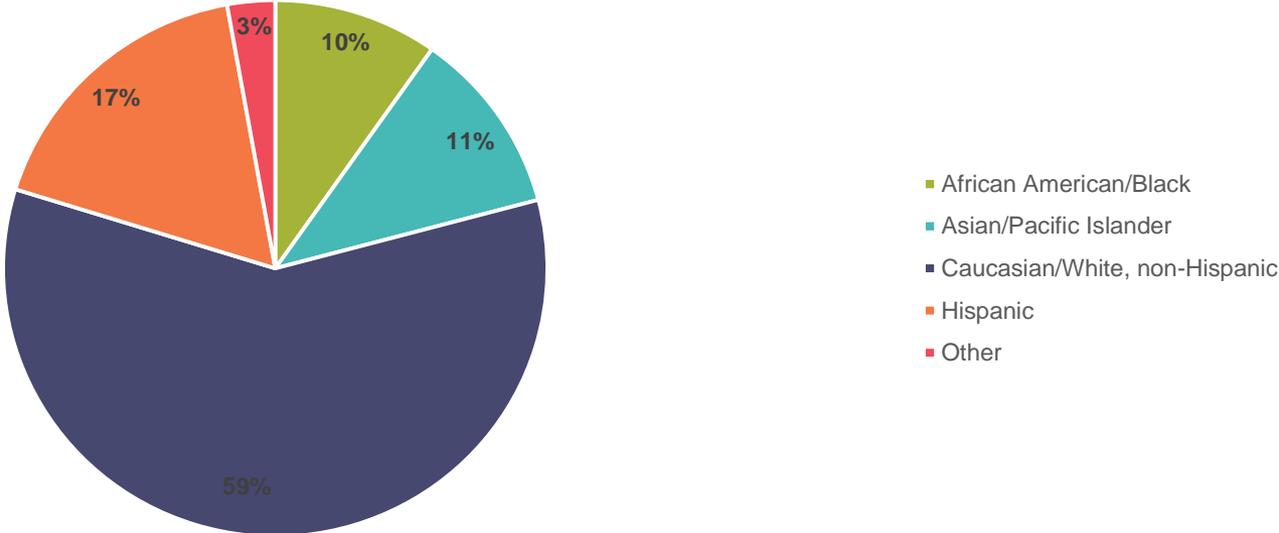
ETHNIC DEMOGRAPHICS



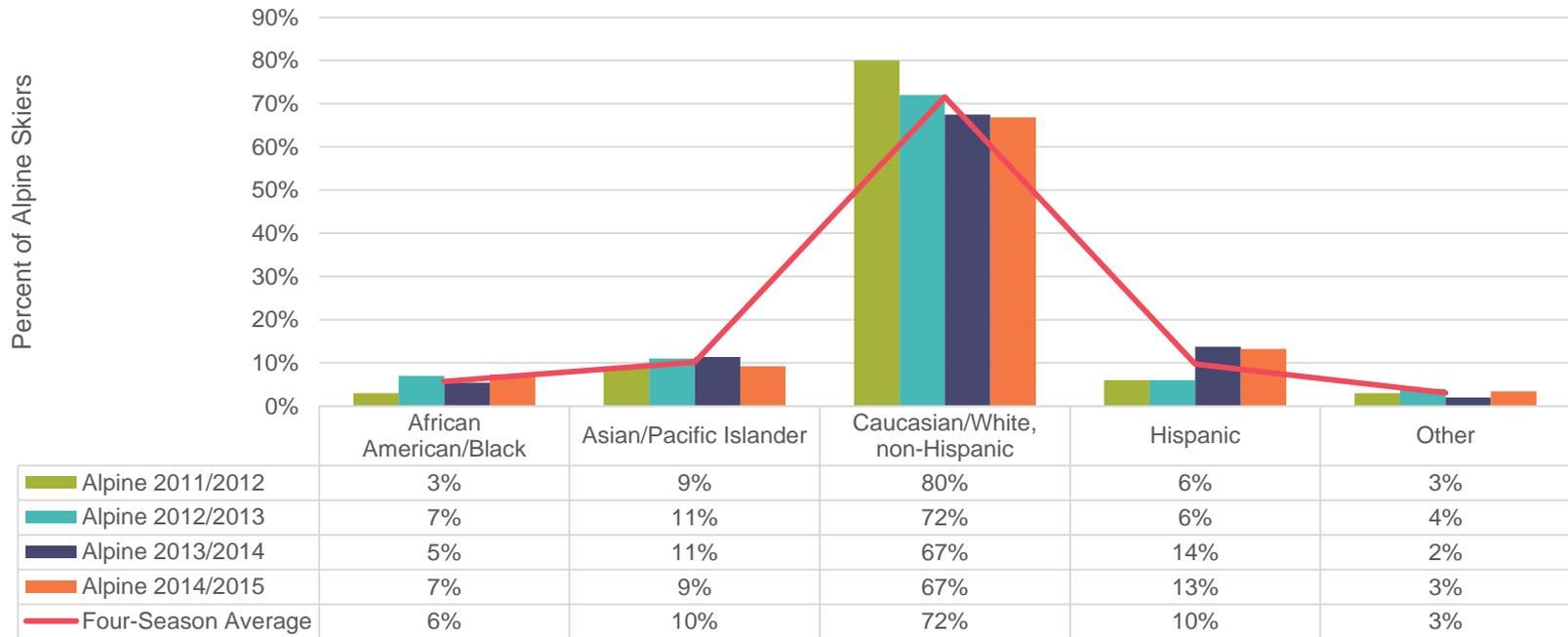
ETHNIC DEMOGRAPHICS BY DISCIPLINE



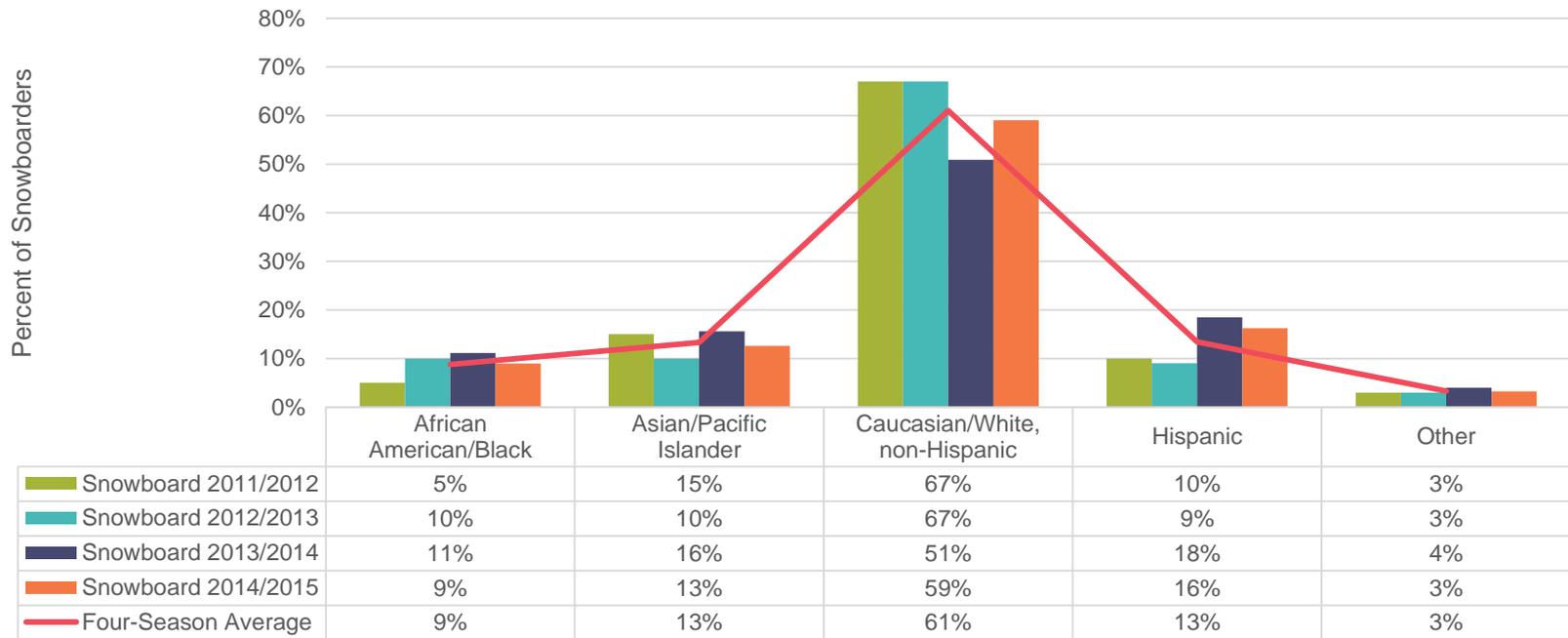
ETHNIC DEMOGRAPHICS



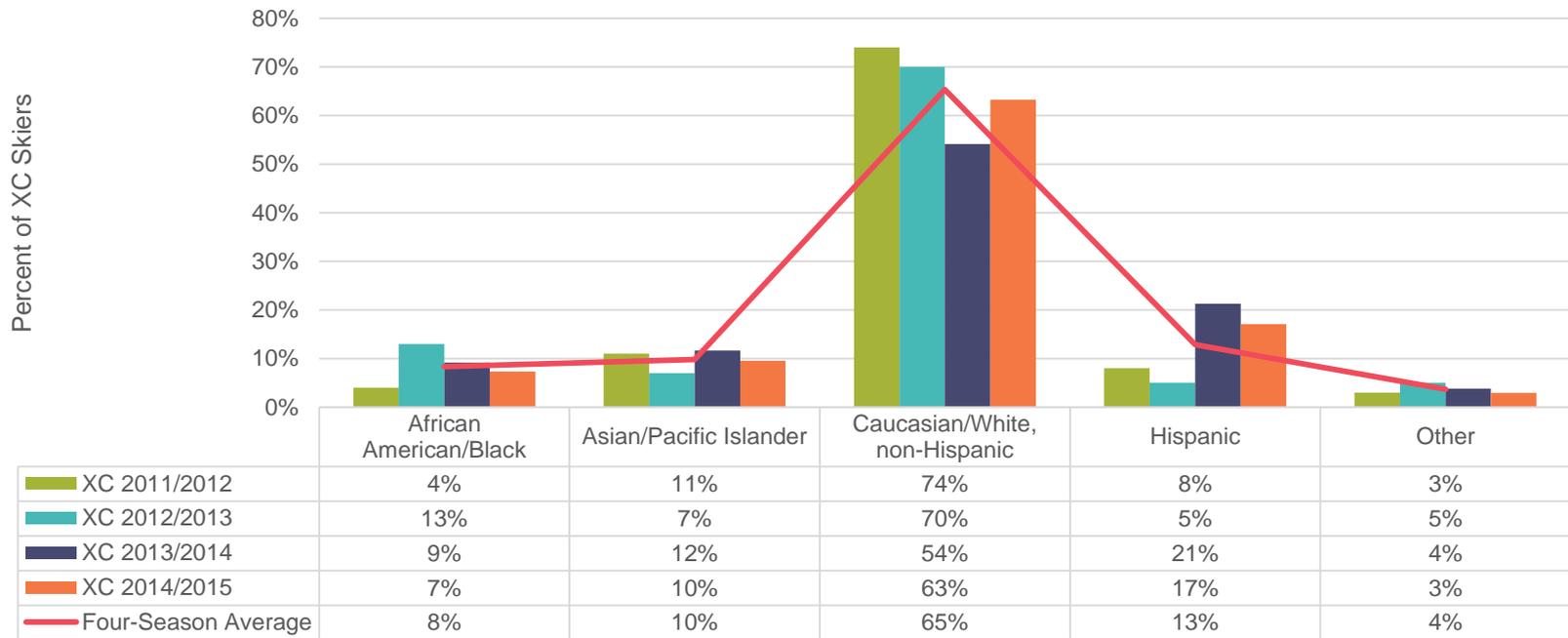
YEAR-TO-YEAR CHANGE IN ETHNICITY: ALPINE SKI



YEAR-TO-YEAR CHANGE IN ETHNICITY: SNOWBOARD



YEAR-TO-YEAR CHANGE IN ETHNICITY: XC SKI



GEOGRAPHIC DEMOGRAPHICS



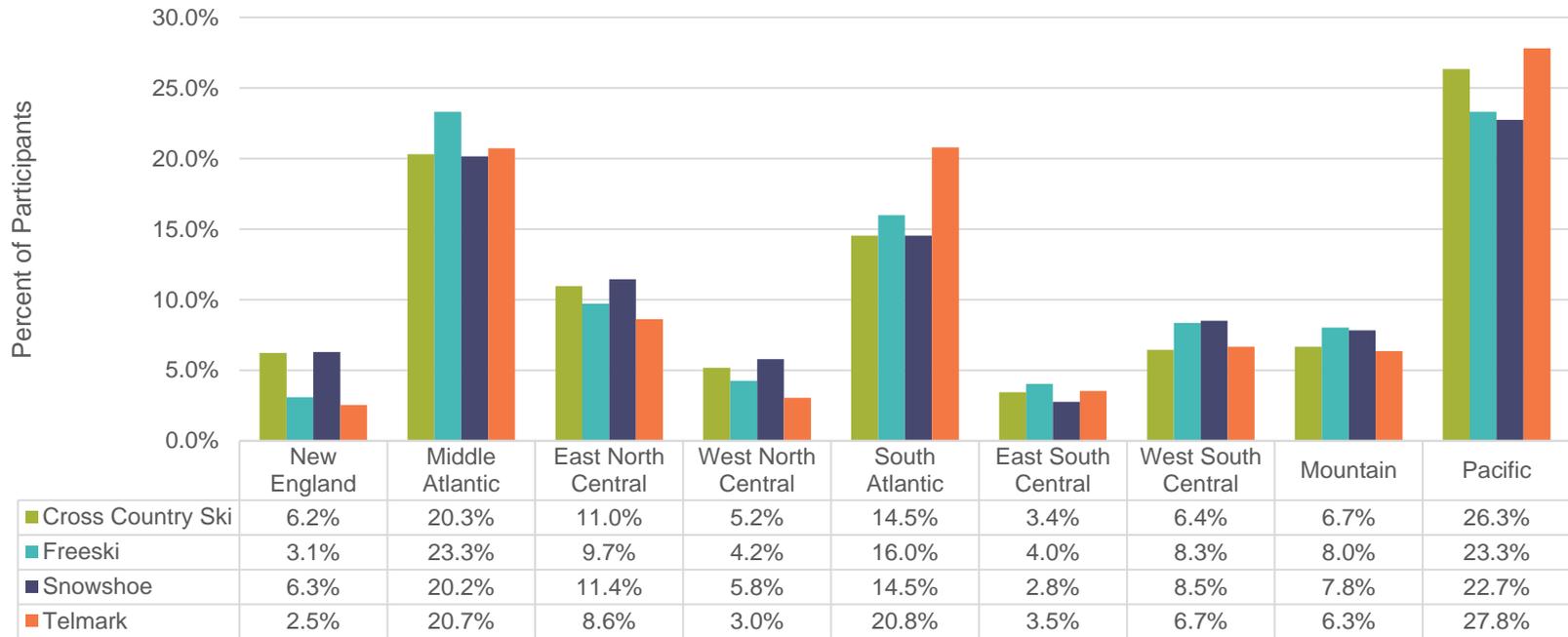
GEOGRAPHIC DEMOGRAPHICS

ALPINE & SNOWBOARD



GEOGRAPHIC DEMOGRAPHICS

CROSS COUNTRY, FREESKI, SNOWSHOE & TELEMAR



PERCENT OF ALPINE PARTICIPANTS PER STATE

| | |
|----------------|-------|
| California | 15.5% |
| New York | 10.6% |
| Texas | 6.8% |
| Ohio | 4.9% |
| Florida | 4.2% |
| Michigan | 4.1% |
| Colorado | 3.8% |
| Massachusetts | 3.7% |
| New Jersey | 3.6% |
| Pennsylvania | 3.4% |
| Washington | 2.7% |
| Maryland | 2.6% |
| North Carolina | 2.6% |
| Minnesota | 2.4% |
| Virginia | 2.4% |
| Illinois | 2.4% |
| New Hampshire | 1.7% |

| | |
|----------------|------|
| Oregon | 1.5% |
| Georgia | 1.4% |
| Wisconsin | 1.3% |
| Oklahoma | 1.2% |
| Tennessee | 1.2% |
| Connecticut | 1.1% |
| Nevada | 1.1% |
| Idaho | 1.1% |
| Iowa | 1.1% |
| Indiana | 1.1% |
| South Carolina | 1.0% |
| Utah | 1.0% |
| Arizona | 1.0% |
| Kentucky | 0.9% |
| Missouri | 0.9% |
| Alabama | 0.9% |
| New Mexico | 0.8% |

| | |
|----------------|------|
| Vermont | 0.6% |
| Nebraska | 0.6% |
| Maine | 0.6% |
| Montana | 0.5% |
| Louisiana | 0.3% |
| Washington, DC | 0.2% |
| West Virginia | 0.2% |
| Wyoming | 0.2% |
| Arkansas | 0.2% |
| Mississippi | 0.1% |
| Kansas | 0.1% |
| Rhode Island | 0.1% |
| Delaware | 0.1% |
| South Dakota | 0.0% |
| North Dakota | 0.0% |



SKIER DENSITY

PERCENT OF POPULATION THAT ALPINE SKIS BY STATE

| | |
|----------------|------|
| Vermont | 9.0% |
| New Hampshire | 8.8% |
| Colorado | 7.6% |
| Wyoming | 6.9% |
| Idaho | 6.8% |
| Massachusetts | 6.2% |
| New York | 6.0% |
| New Mexico | 5.8% |
| Montana | 5.4% |
| Washington, DC | 5.3% |
| Michigan | 4.6% |
| Minnesota | 4.5% |
| California | 4.4% |
| Maryland | 4.3% |
| Maine | 4.0% |
| Ohio | 4.0% |
| Iowa | 3.9% |

| | |
|----------------|------|
| New Jersey | 3.8% |
| Washington | 3.7% |
| Connecticut | 3.6% |
| Nevada | 3.6% |
| Utah | 3.5% |
| Nebraska | 3.4% |
| Oklahoma | 3.0% |
| Oregon | 3.0% |
| Virginia | 2.9% |
| North Carolina | 2.8% |
| Pennsylvania | 2.8% |
| Texas | 2.7% |
| South Carolina | 2.5% |
| Florida | 2.4% |
| Indiana | 2.3% |
| Wisconsin | 2.2% |
| Kentucky | 2.0% |

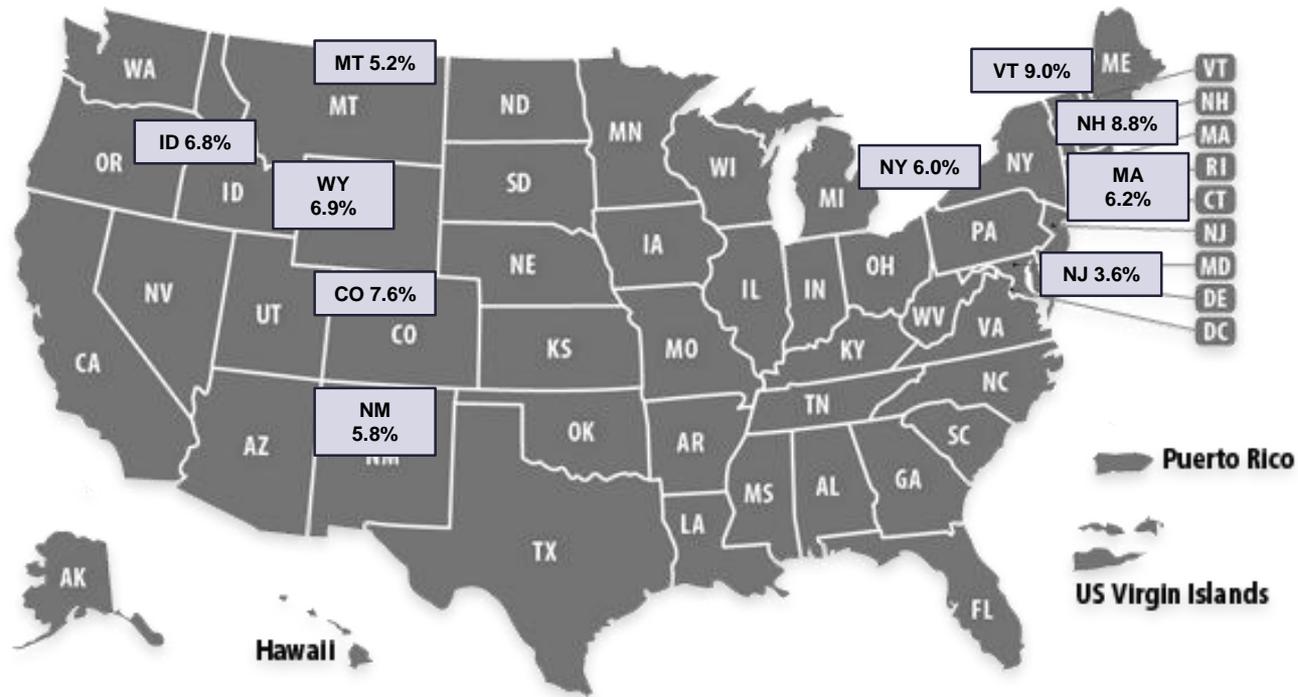
| | |
|---------------|------|
| Illinois | 1.9% |
| Tennessee | 1.9% |
| Alabama | 1.8% |
| West Virginia | 1.7% |
| Missouri | 1.5% |
| Arizona | 1.5% |
| Georgia | 1.4% |
| Rhode Island | 1.2% |
| Delaware | 0.9% |
| Louisiana | 0.8% |
| Mississippi | 0.7% |
| Arkansas | 0.7% |
| South Dakota | 0.5% |
| Kansas | 0.5% |
| North Dakota | 0.0% |



SKIER DENSITY

PERCENT OF POPULATION THAT ALPINE SKIS

BY STATE



PERCENT OF SNOWBOARD PARTICIPANTS PER STATE

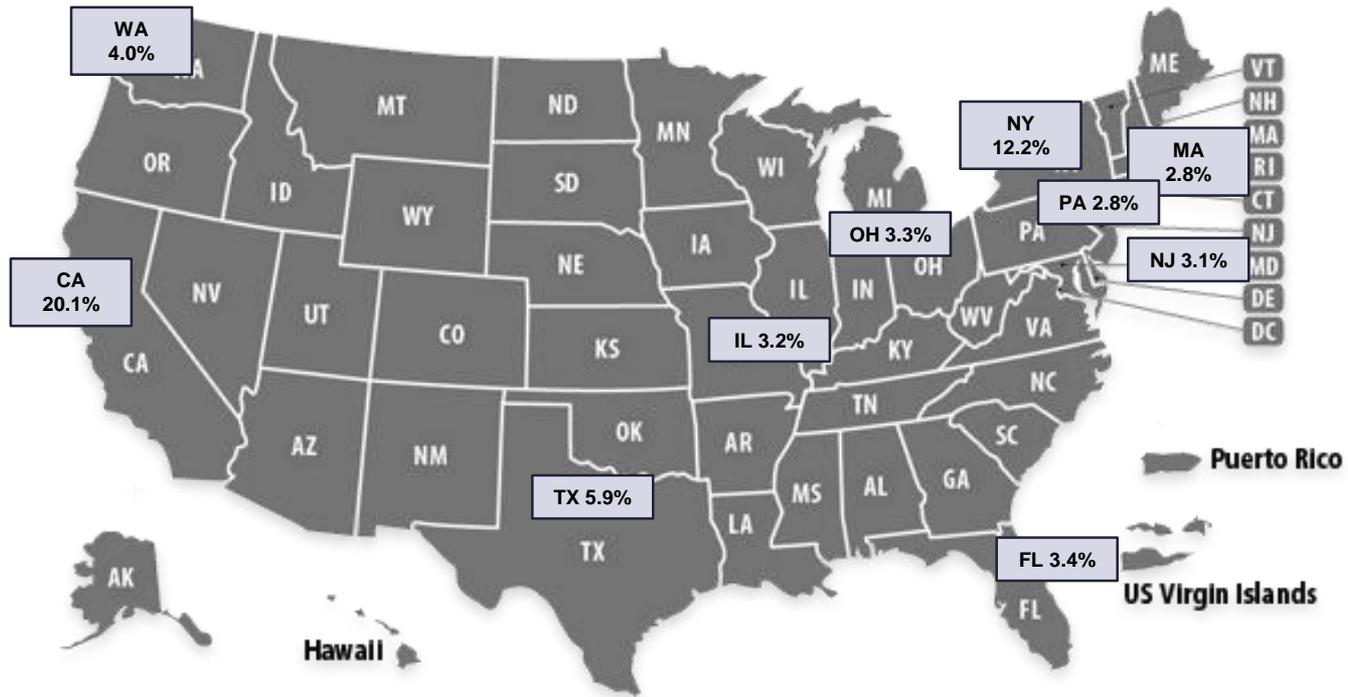
| | |
|----------------|-------|
| California | 20.1% |
| New York | 12.2% |
| Texas | 5.9% |
| Washington | 4.0% |
| Florida | 3.4% |
| Ohio | 3.3% |
| Illinois | 3.2% |
| New Jersey | 3.1% |
| Pennsylvania | 2.8% |
| Massachusetts | 2.8% |
| Colorado | 2.7% |
| Maryland | 2.5% |
| Wisconsin | 2.5% |
| Virginia | 2.5% |
| Michigan | 2.4% |
| North Carolina | 2.2% |
| Georgia | 1.9% |

| | |
|----------------|------|
| Connecticut | 1.9% |
| Minnesota | 1.8% |
| Idaho | 1.7% |
| Alabama | 1.6% |
| Utah | 1.4% |
| Oregon | 1.4% |
| Nevada | 1.3% |
| Arizona | 1.2% |
| Missouri | 1.1% |
| South Carolina | 1.0% |
| Indiana | 1.0% |
| Iowa | 0.8% |
| West Virginia | 0.8% |
| Kentucky | 0.7% |
| Kansas | 0.6% |
| Delaware | 0.6% |
| Louisiana | 0.5% |

| | |
|---------------|------|
| Tennessee | 0.5% |
| Nebraska | 0.5% |
| New Mexico | 0.4% |
| Montana | 0.3% |
| Maine | 0.3% |
| New Hampshire | 0.2% |
| Arkansas | 0.2% |
| Washington,DC | 0.2% |
| Wyoming | 0.1% |
| Vermont | 0.1% |
| Oklahoma | 0.1% |
| Rhode Island | 0.1% |
| Mississippi | 0.1% |
| South Dakota | 0.1% |
| North Dakota | 0.0% |



TOP TEN STATES FOR SNOWBOARDERS



RIDER DENSITY

PERCENT OF POPULATION THAT SNOWBOARDS BY STATE

| | |
|----------------|------|
| Idaho | 8.8% |
| New York | 5.8% |
| Connecticut | 5.1% |
| California | 4.9% |
| Colorado | 4.6% |
| West Virginia | 4.5% |
| Washington | 4.5% |
| Washington, DC | 4.3% |
| Delaware | 4.2% |
| Utah | 4.1% |
| Massachusetts | 3.7% |
| Nevada | 3.5% |
| Wisconsin | 3.4% |
| Maryland | 3.3% |
| Minnesota | 2.8% |
| New Mexico | 2.7% |
| Alabama | 2.7% |

| | |
|----------------|------|
| New Jersey | 2.7% |
| Montana | 2.6% |
| Oregon | 2.4% |
| Iowa | 2.4% |
| Nebraska | 2.3% |
| Michigan | 2.2% |
| Virginia | 2.2% |
| Ohio | 2.2% |
| South Carolina | 2.1% |
| Illinois | 2.1% |
| North Carolina | 2.1% |
| Wyoming | 2.0% |
| Pennsylvania | 1.9% |
| Texas | 1.9% |
| Kansas | 1.9% |
| Vermont | 1.9% |
| Indiana | 1.8% |

| | |
|---------------|------|
| Maine | 1.8% |
| Georgia | 1.6% |
| Florida | 1.6% |
| Missouri | 1.5% |
| Arizona | 1.4% |
| New Hampshire | 1.4% |
| Kentucky | 1.3% |
| Louisiana | 1.1% |
| South Dakota | 0.8% |
| Arkansas | 0.6% |
| Tennessee | 0.6% |
| North Dakota | 0.6% |
| Rhode Island | 0.5% |
| Mississippi | 0.3% |
| Oklahoma | 0.2% |

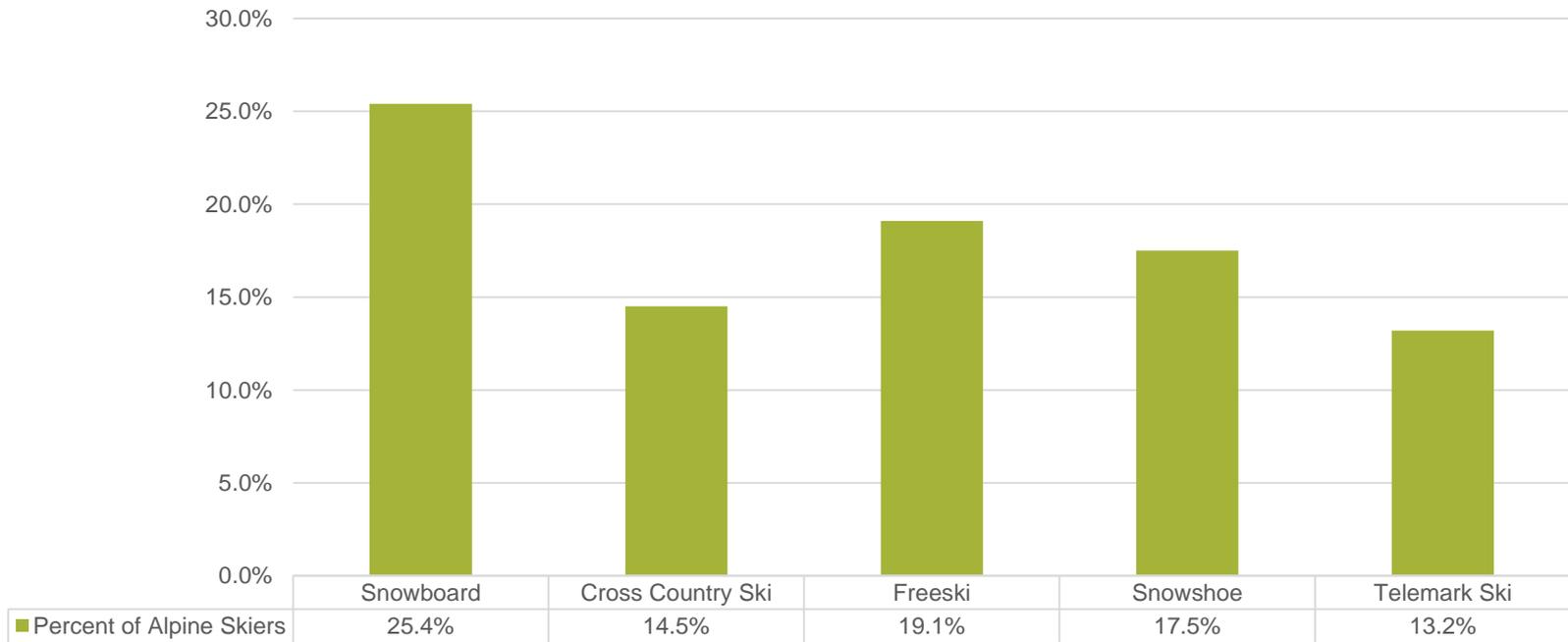


CROSS PARTICIPATION



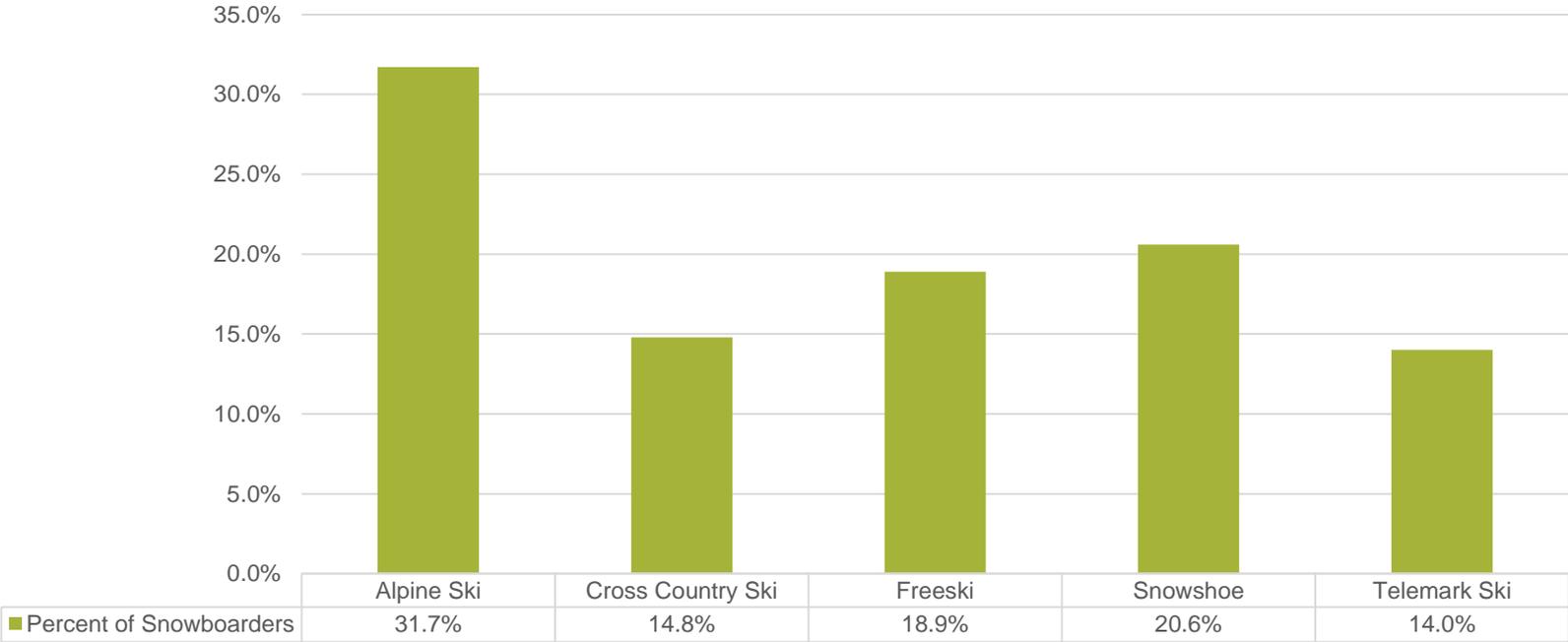
CROSS PARTICIPATION

PERCENT OF ALPINE SKIERS IN OTHER DISCIPLINES



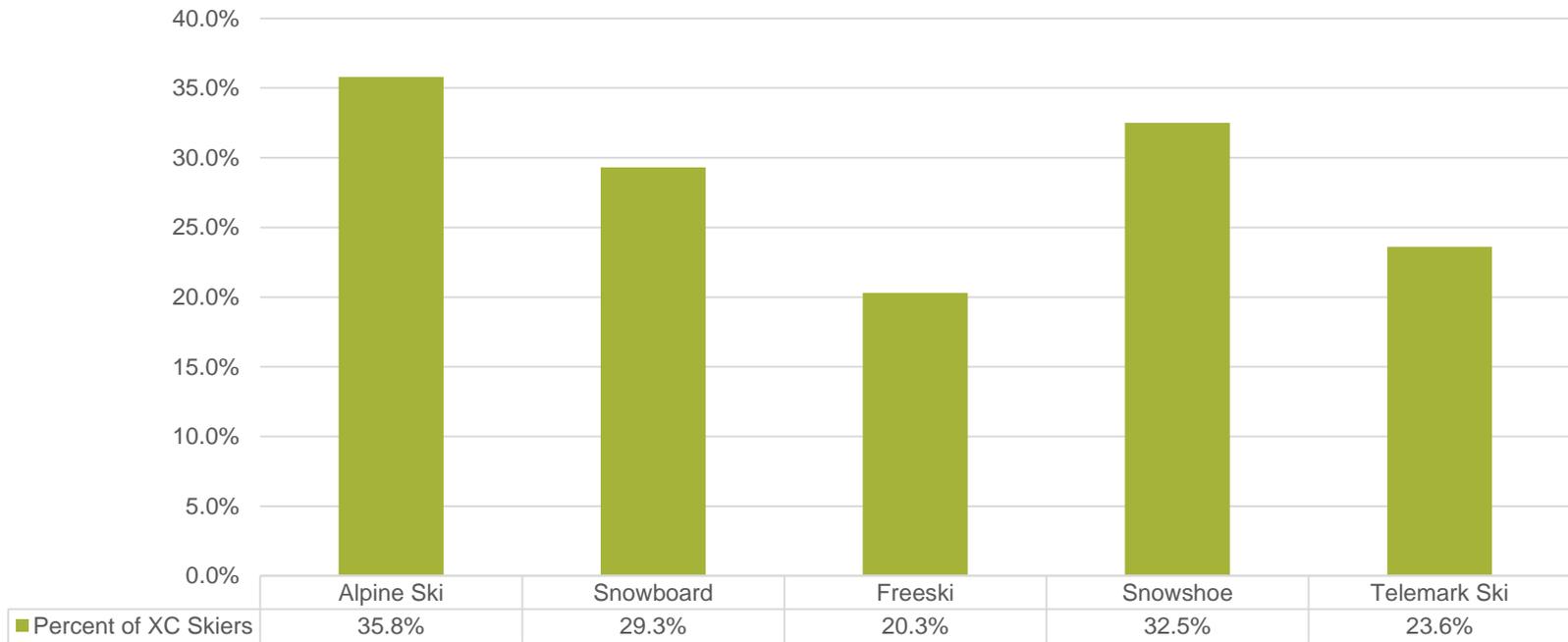
CROSS PARTICIPATION

PERCENT OF SNOWBOARDERS IN OTHER DISCIPLINES



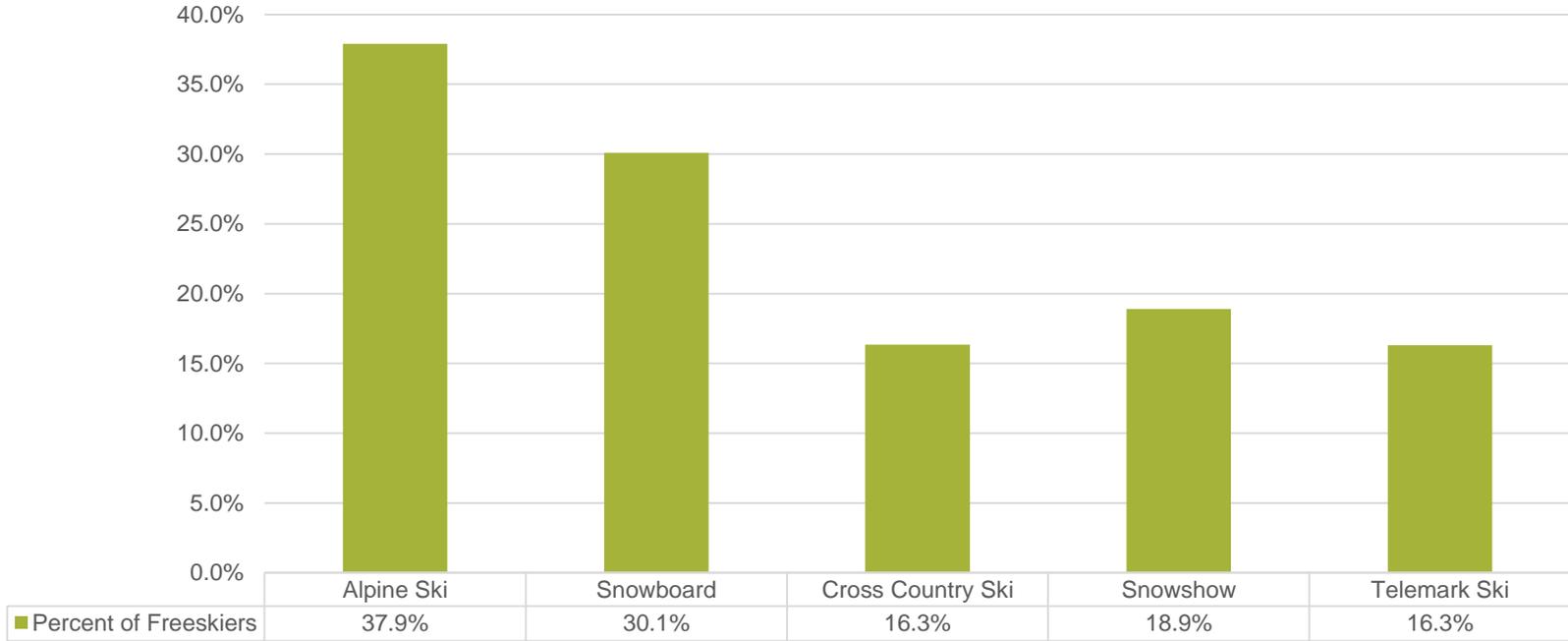
CROSS PARTICIPATION

PERCENT OF XC SKIERS IN OTHER DISCIPLINES



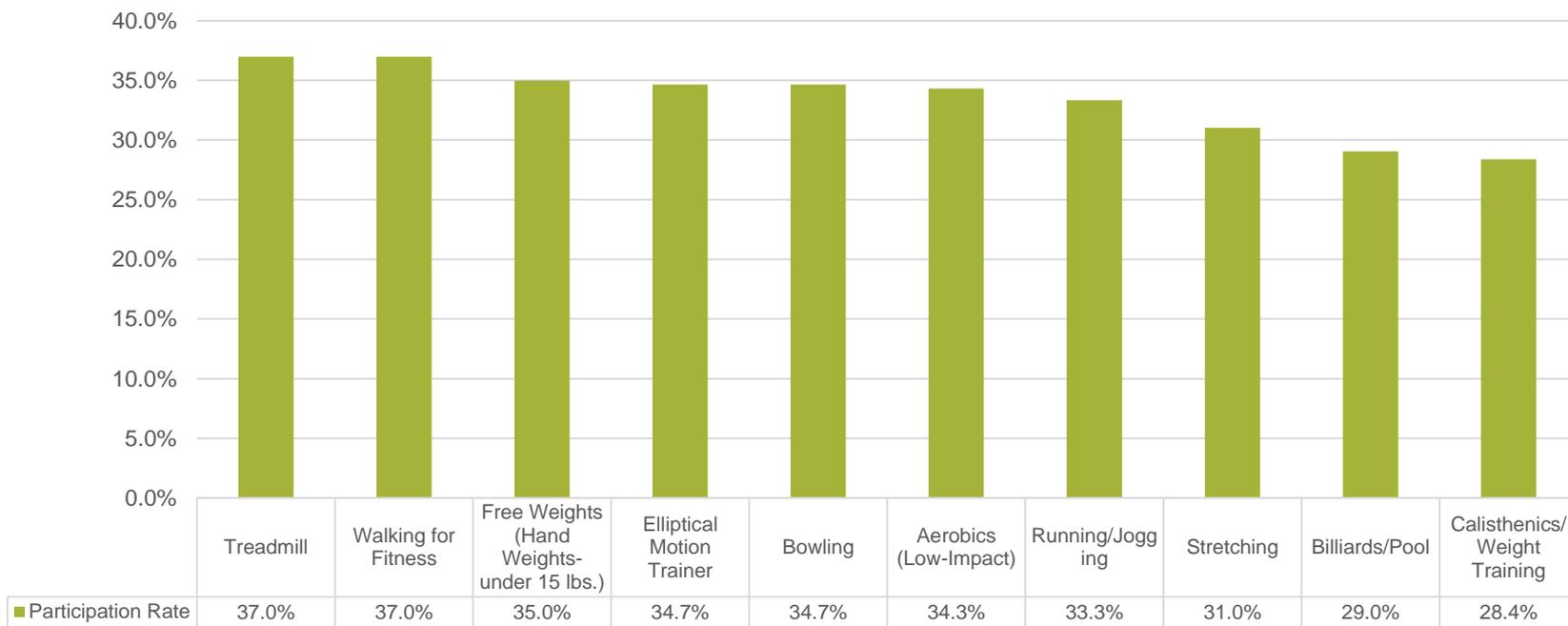
CROSS PARTICIPATION

PERCENT OF FREESKIERS IN OTHER DISCIPLINES



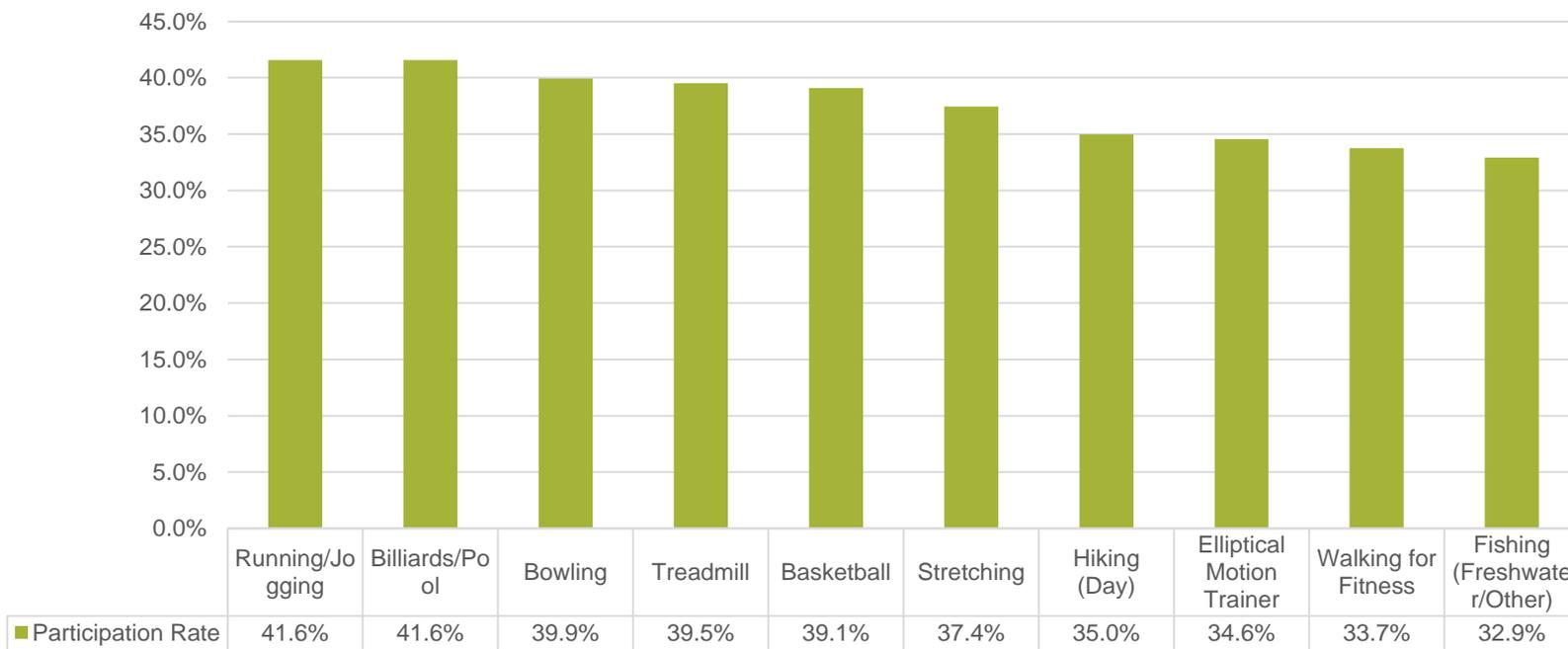
CROSS PARTICIPATION

MOST POPULAR OFF-SNOW ACTIVITIES FOR ALPINE SKIERS



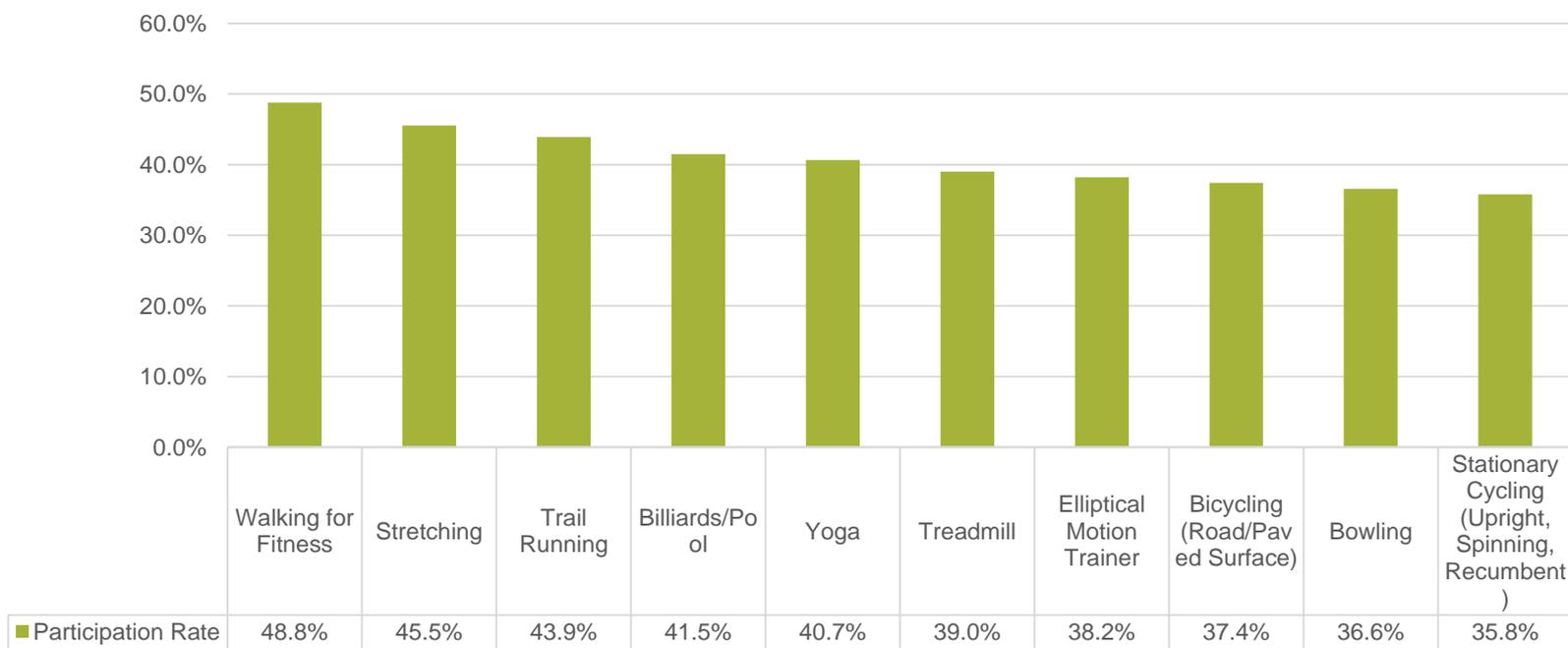
CROSS PARTICIPATION

MOST POPULAR OFF-SNOW ACTIVITIES FOR SNOWBOARDERS



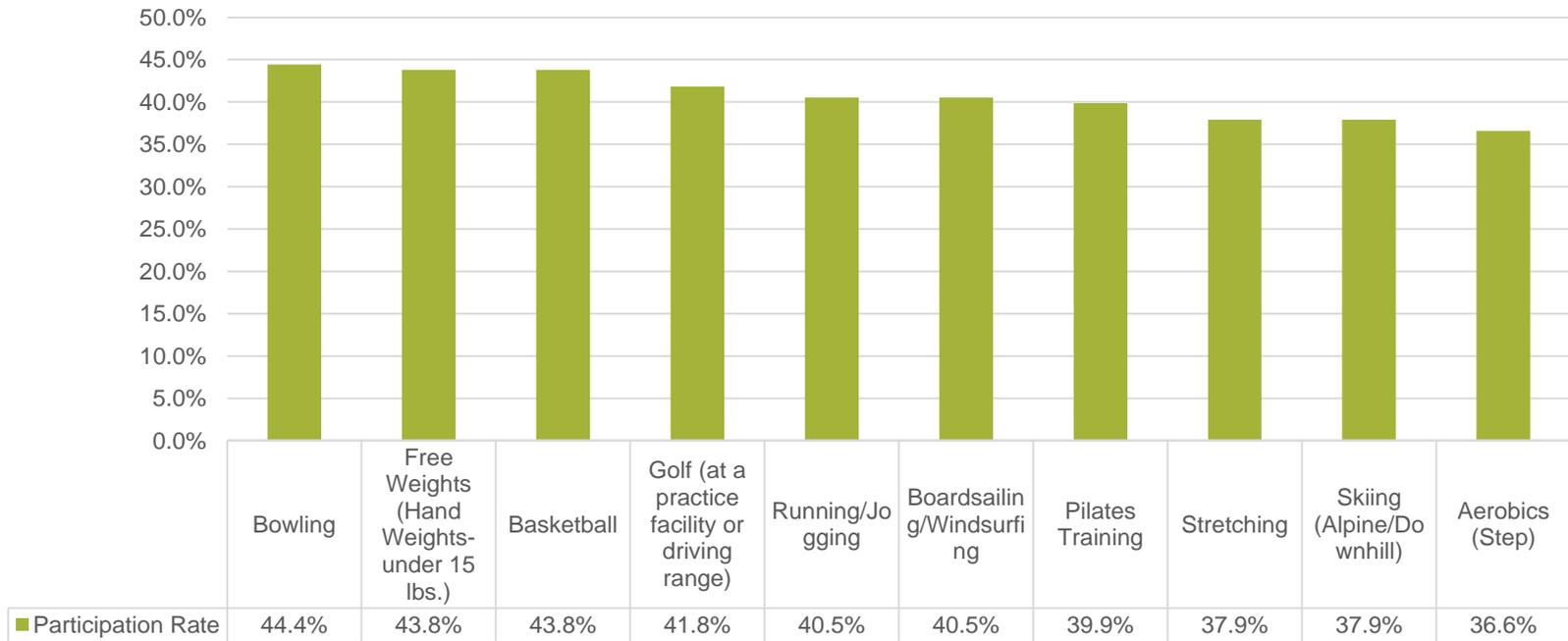
CROSS PARTICIPATION

MOST POPULAR OFF-SNOW ACTIVITIES FOR XC SKIERS



CROSS PARTICIPATION

MOST POPULAR OFF-SNOW ACTIVITIES FOR FREESKIERS

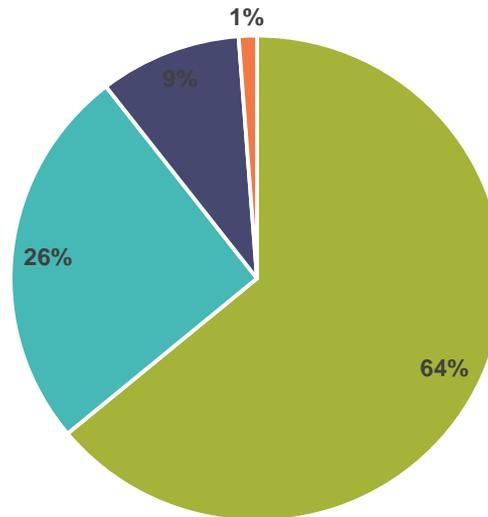


PARTICIPATION TRENDS



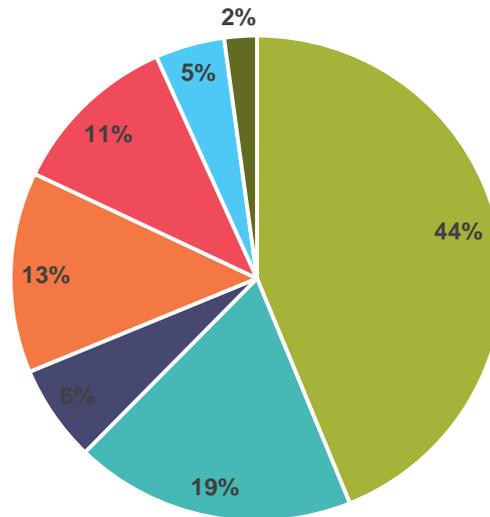
WHERE PARTICIPANTS ALPINE SKI

■ Resort-Marked Trails ■ Resort Ungroomed Trails ■ Non-Resort Ungroomed Trails ■ Other



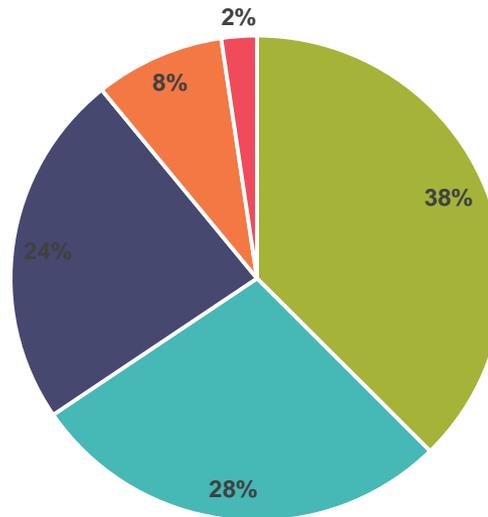
WHERE SNOWBOARDERS RIDE

■ Resort Marked Trails ■ Resort Ungroomed Trails ■ Non-Resort Ungroomed Trails ■ Terrain Park ■ Urban Area ■ Golf Course ■ Other



WHERE FREESKIERS PARTICIPATE

■ Resort ■ Terrain Park ■ Urban Area ■ Golf Course ■ Other



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