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PARTICIPATION STUDY 2017

INTRODUCTION

The SIA Participation Study is a comprehensive look at participants in winter sports including: skiing, snowboarding, cross-country skiing, snowshoeing, sledding, and telemarking. The study highlights a general cumulative view of winter sport participation and demographics, in addition to further in-depth analyses of each winter sport activity. It covers participant demographics, frequency, regional representation, crossover activities, and more.

The SIA Participation Study is produced in collaboration with the Physical Activity Council (PAC), a partnership of eight major trade associations in US sports, fitness, and leisure activities.

A total of 24,134 online surveys were carried out with a nationwide sample of individuals and households during 2016 and the beginning of 2017. The total panel is representative of the US population for people ages six and older. A full description of the research methodology is found at the end of this study.

For further information on winter sport participation, please contact rcoombs@snowsports.org.

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THE TAKEAWAY

WINTER SPORTS

Defined as: Skiing, Snowboarding, Snowshoeing, XC Skiing, Sledding/Saucer Riding/Snow Tubing, Telemark

Winter Sport participation grew 5% in the 2016/2017 winter season to 24.7 Million Americans ages 6 and older.

The South Atlantic Region has the largest number of winter sport participants at about 4.7M and according to NSAA, 47.9% took their visits to Rocky Mountain resorts*

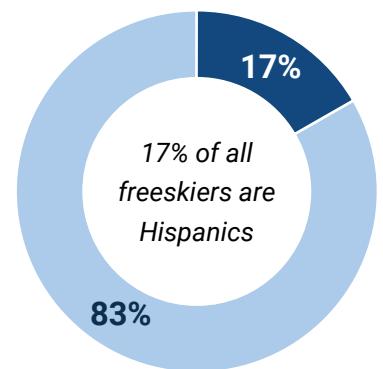
*Source: National Ski Areas Association, NSAA National Demographic Study, August 2017, p.17

ALPINE SKIING

- The Middle Atlantic Region (NJ, NY, PA, WV) has the largest share of all alpine skiers that go 9 or more times
- Vermont, Colorado, and Idaho have the highest percentage of alpine skiers by state
- Increased family commitments, no one to go with, and increased work commitments were the top 3 reasons (other than time or money) for skiers NOT participating in the 2016/2017 winter season

FREESKIING

- The Pacific Region (CA, OR, WA) has the largest share of freeskiers at 23.1%
- More than 1/3 of all freeskiers that go 9 or more times are youth (17 & under)



SNOWBOARDING



The Pacific Region (CA, OR, WA) has the largest share of all snowboarders that go 9 or more times

- Youth (ages under 17) grew 6% growth from last season. Female participants of this age group grew over 50K.
- More than 1/4 of all snowboarders that go 9 or more times are ages 25-34
- Increased work commitments, increased family commitments, and poor weather were the top three reasons (other than time or money) for snowboarders NOT participating in the 2016/2017 winter season

XC SKIING

More cross-country skiers went to a private Nordic center than a public Nordic center with trails groomed by a government entity

SNOWSHOEING

More than 40% of snowshoers also participate in Fishing (Freshwater/Other)



WINTER SPORTS PARTICIPATION AND DEMOGRAPHICS

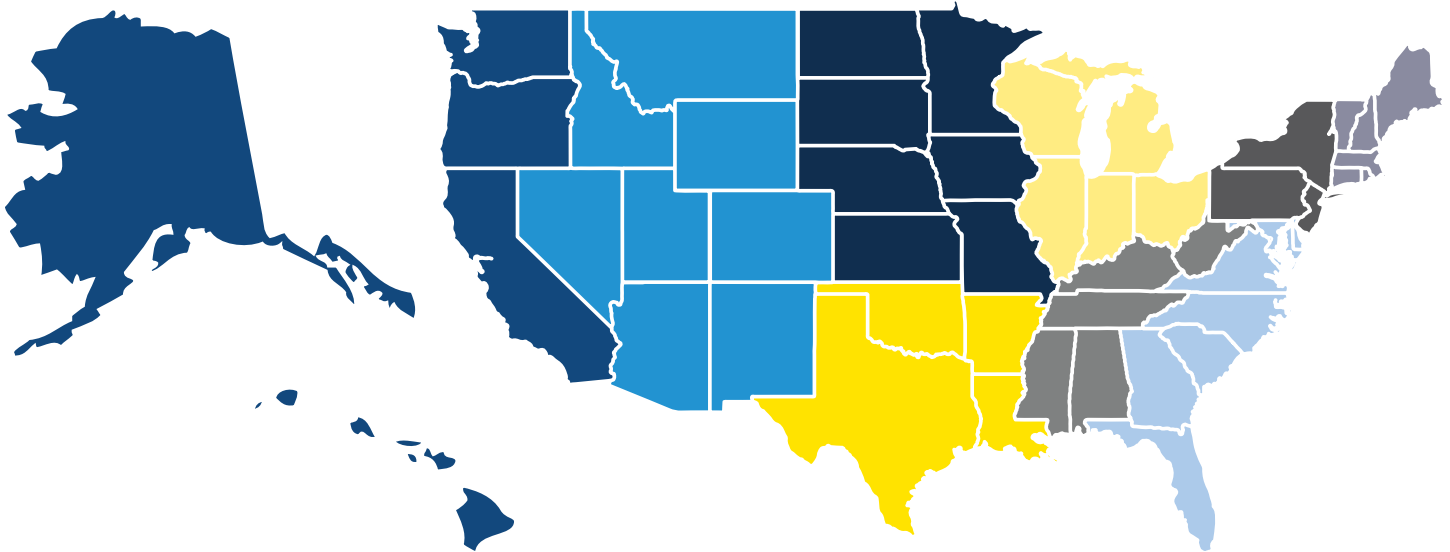
TOTAL PARTICIPANTS: 24.7M



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WINTER SPORTS PARTICIPATION BY REGION

These numbers and percentages are based on 24.7M total winter sport participants



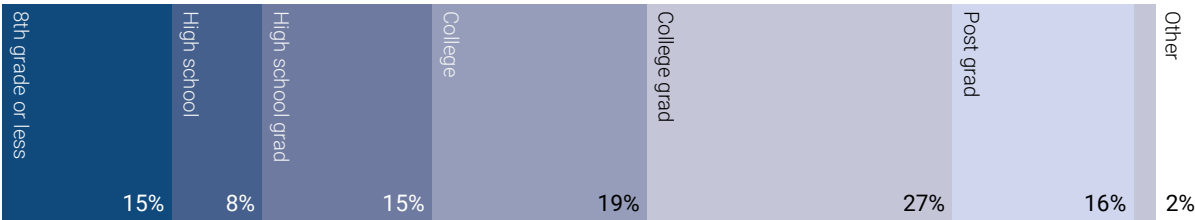
PACIFIC 4.5M	WEST NORTH CENTRAL 1.5M	NEW ENGLAND 1.5M
MOUNTAIN 2.1M	EAST NORTH CENTRAL 3.4M	MIDDLE ATLANTIC 3.4M
WEST SOUTH CENTRAL 2.5M	EAST SOUTH CENTRAL 1.1M	SOUTH ATLANTIC 4.7M



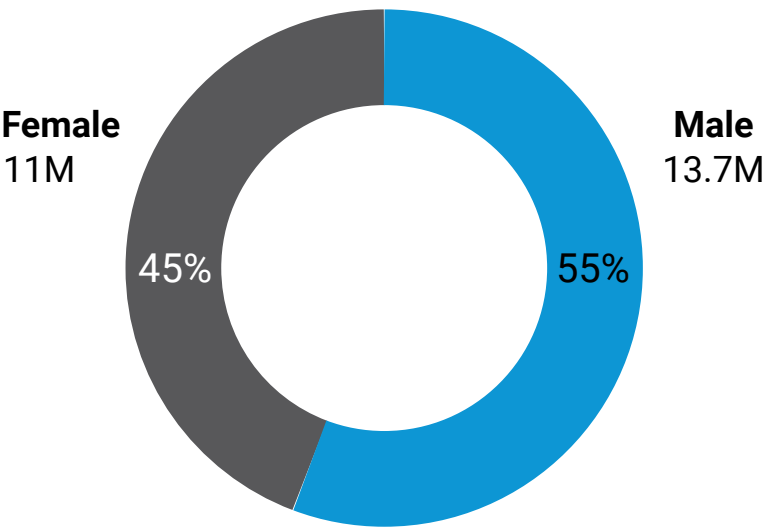
24.7 Million Americans ages 6 and older participated in winter sports in the 2016/2017 winter season. This is up 5% from 23.5 Million recorded in the 2015/2016 winter season. Overall, winter sport participants are skewed slightly male, with higher household incomes, and have higher levels of education.

**WINTER SPORTS DEFINED AS THE FOLLOWING
ACTIVITIES: ALPINE SKI, FREESKI, SNOWBOARD, XC SKI,
TELEMARK, SNOWSHOE, AND SLED**

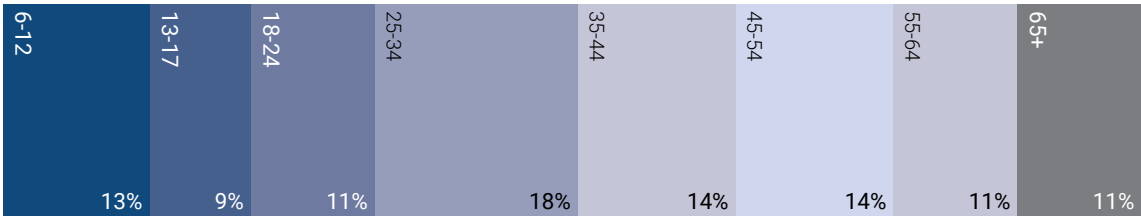
PARTICIPANTS BY EDUCATION



BY GENDER



BY AGE

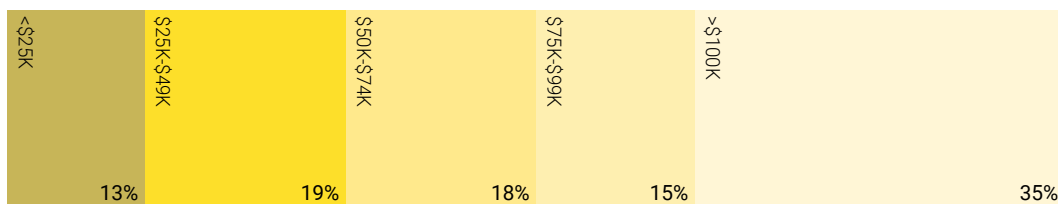


These numbers and percentages are based on 24.7M total winter sport participants
SIA Participation Study 2017

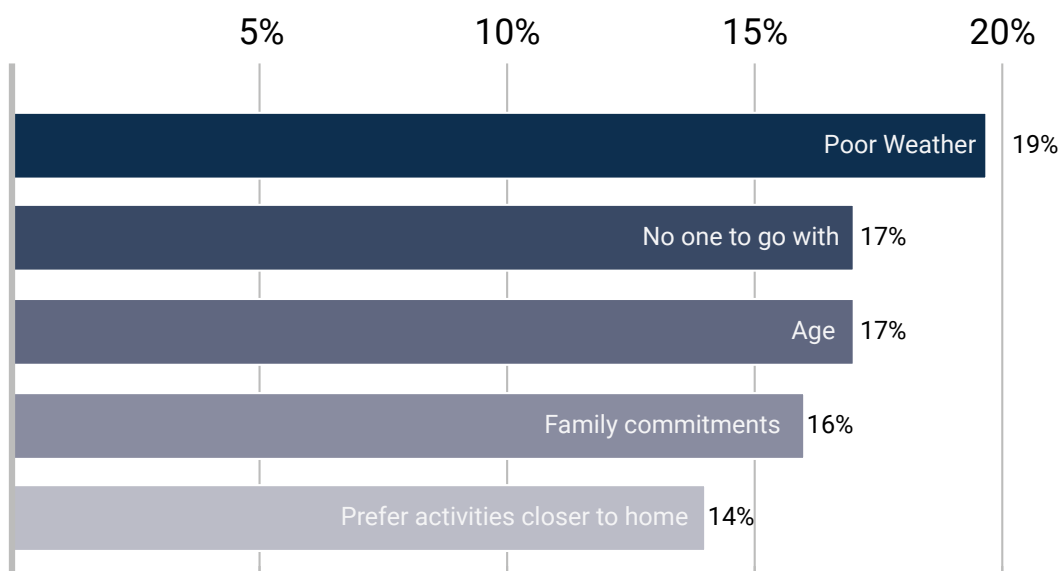
BY ETHNICITY



BY INCOME



TOP BARRIERS TO PARTICIPATION



*These numbers and percentages are based on 24.7M total winter sport participants
SIA Participation Study 2017*

PARTICIPATION OVER TIME

	DOWHILL SKI		ALPINE SKI		FREESKI		SNOWBOARD		XC SKI		TELEMARK SKI		SNOWSHOE	
	Growth %		Growth %		Growth %		Growth %		Growth %		Growth %		Growth %	
2008/2009	11.7M		10.3M		2.7M		7.2M		3.8M		1.4M		4.9M	
2009/2010	12.4M	6%	10.9M	6%	3.0M	9%	7.4M	4%	4.2M	8%	1.5M	3%	3.4M	-30%
2010/2011	13.4M	8%	11.5M	5%	3.6M	24%	8.2M	10%	4.4M	5%	1.8M	23%	3.8M	11%
2011/2012	12.5M	-6%	10.2M	-11%	3.6M	0%	7.6M	-8%	4.3M	-1%	2.1M	15%	4.1M	8%
2012/2013	10.5M	-16%	8.2M	-19%	4.5M	24%	7.4M	-3%	3.3M	-23%	2.8M	32%	4.0M	-2%
2013/2014	11.1M	5%	9.0M	9%	4.1M	-10%	7.4M	1%	4.3M	30%	2.5M	-10%	3.6M	-11%
2014/2015	11.7M	5%	9.4M	4%	4.5M	10%	7.7M	4%	4.1M	-3%	2.6M	3%	3.9M	8%
2015/2016	11.6M	0%	9.3M	-1%	4.6M	4%	7.6M	-1%	4.6M	12%	2.8M	11%	3.5M	-9%
2016/2017	11.9M	2%	9.9M	7%	5.4M	16%	7.6M	-1%	5.1M	9%	2.5M	-11%	3.7M	5%
% of US Pop. 6 and older	4.00%		3.33%		1.81%		2.55%		1.71%		0.85%		1.25%	

**Downhill: Alpine Ski & Freeski with crossover removed*

AVERAGE NUMBER OF DAYS BY AGE AND ACTIVITY

	Total Avg	6-12	13-17	18-24	25-34	35-44	45-54	55+
ALPINE SKI	7.9	5.8	5.7	7.4	8.0	7.7	6.8	9.0
FREESKI	7.4	7.2	8.8	6.5	4.9	4.3	7.3	7.0
SNOWBOARD	7.5	7.0	9.8	7.3	5.0	6.1	10.4	8.6
XC SKI	7.8	6.1	15.8	11.0	6.6	4.6	10.7	7.1
SNOWSHOE	6.9	6.7	5.3	5.9	9.1	3.4	5.0	6.5
TELEMARK	5.8	3.6	6.4	5.2	4.9	3.5	11.9	5.9

These numbers and percentages are based on 24.7M total winter sport participants

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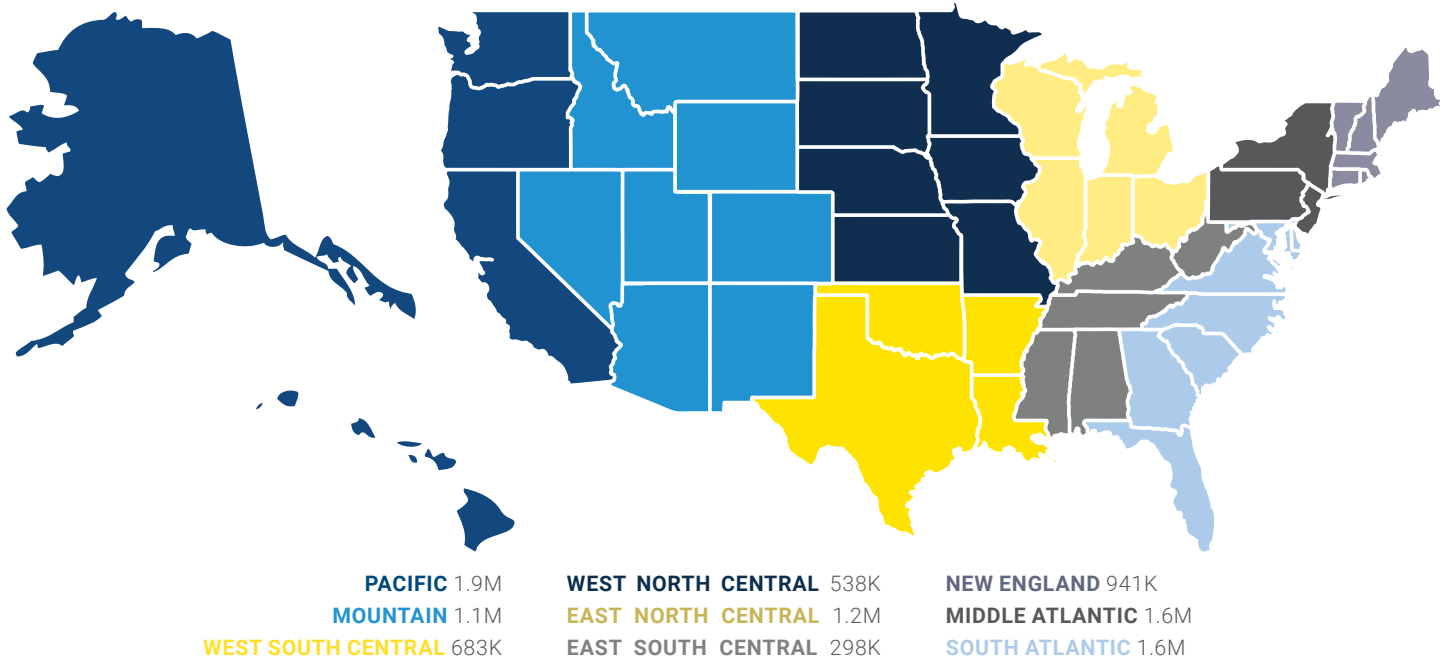
ALPINE SKI PARTICIPATION AND DEMOGRAPHICS

TOTAL PARTICIPANTS: 9.876M



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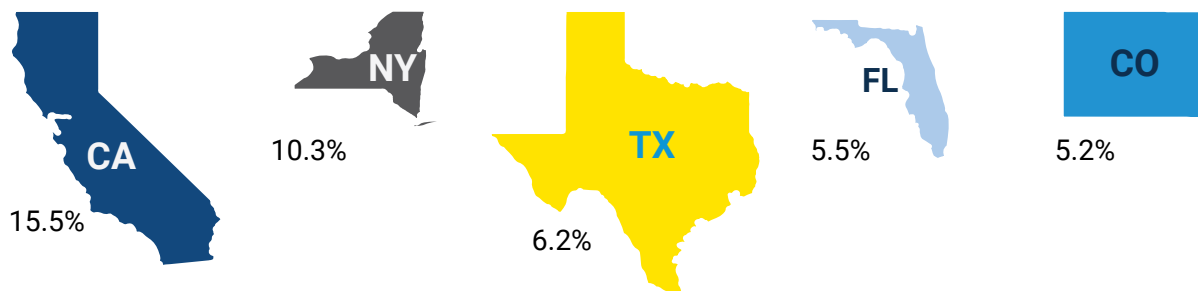
ALPINE SKIING BY REGION



"The Middle Atlantic region represents the largest share of Alpine Skiers that go 9 or more times at 17.9% and alpine skiers ages 45 and older are growing as a percentage of all alpine skiers"

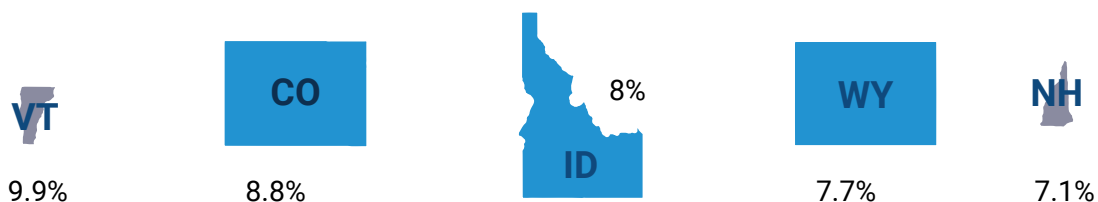
STATES WITH GREATEST SHARE OF TOTAL SKI POPULATION

Of the 9.8M ski participants in the US, these states have the greatest percentage of skiers by origin



STATES WITH GREATEST PERCENTAGE OF SKIERS

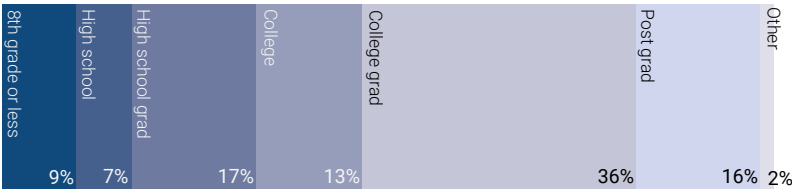
These states have the greatest number of skiers per the total state population



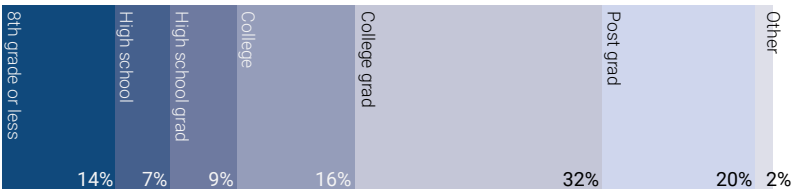
The numbers and percentages above are based on 9.876M total alpine ski participants

SIA Participation Study 2017

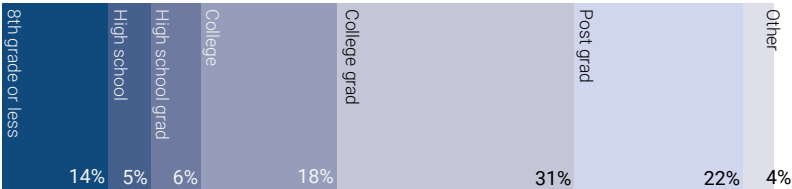
BY EDUCATION & FREQUENCY PER YEAR



One Time

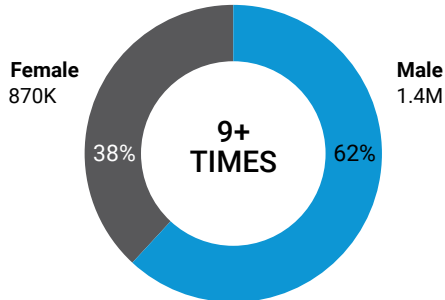
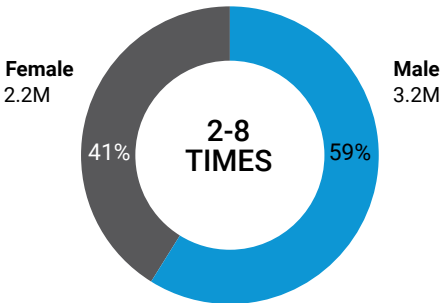
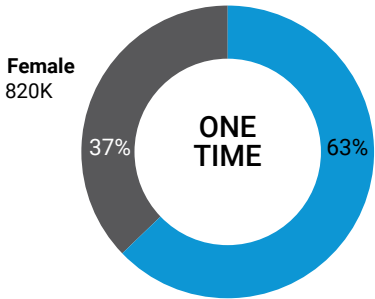


2-8 Times



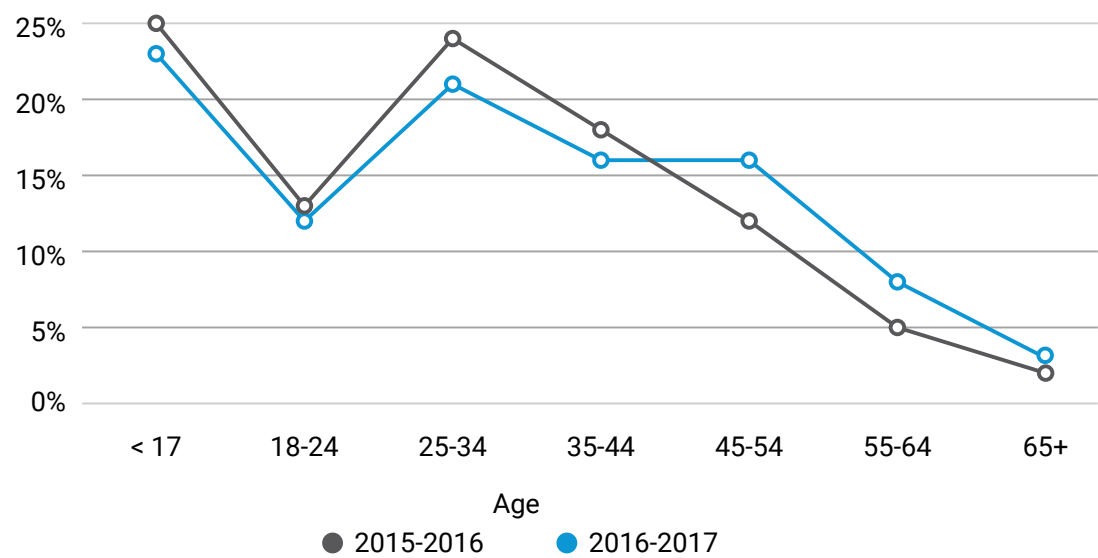
9+ Times

BY GENDER & FREQUENCY PER YEAR

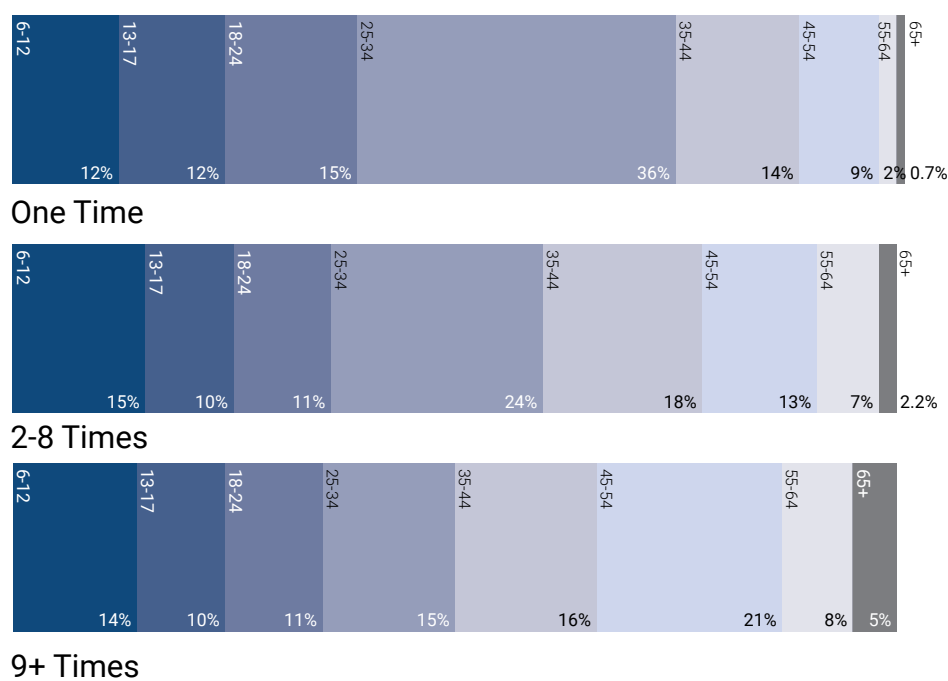


The numbers and percentages above are based on 9.876M total alpine ski participants
SIA Participation Study 2017

BY AGE OVER TIME

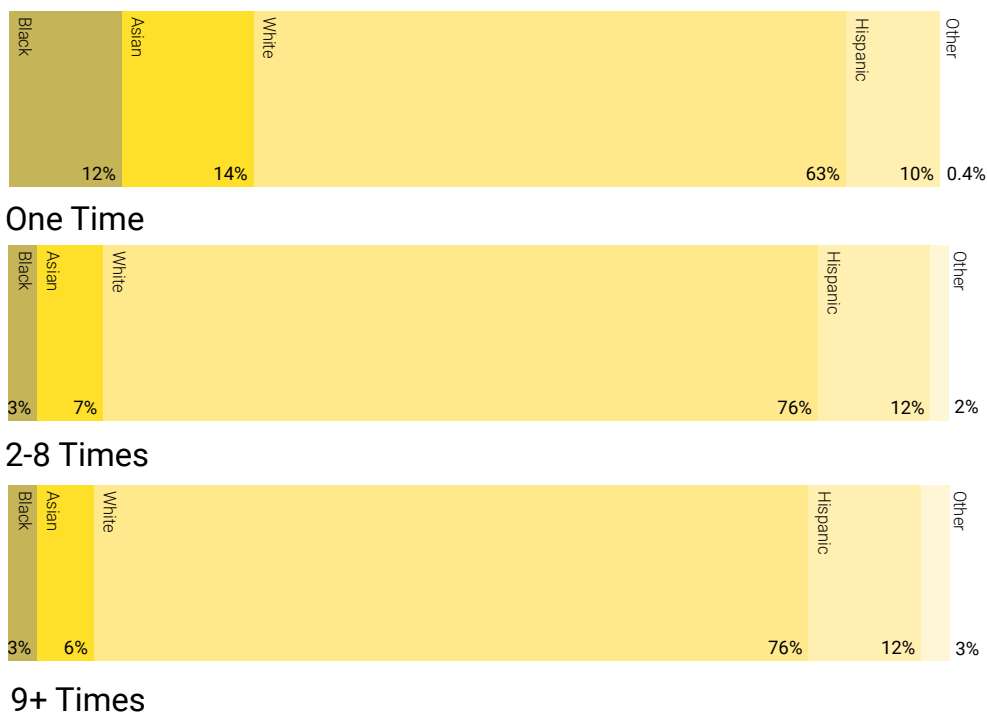


BY AGE & FREQUENCY PER YEAR

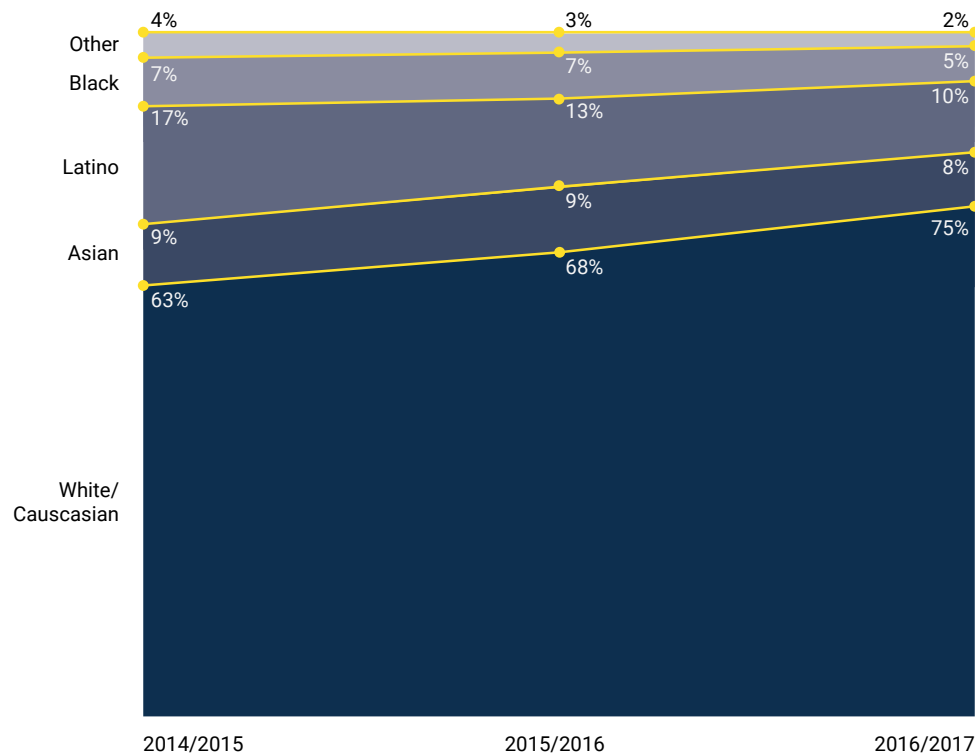


The numbers and percentages above are based on 9.876M total alpine ski participants
SIA Participation Study 2017

BY ETHNICITY & FREQUENCY PER YEAR

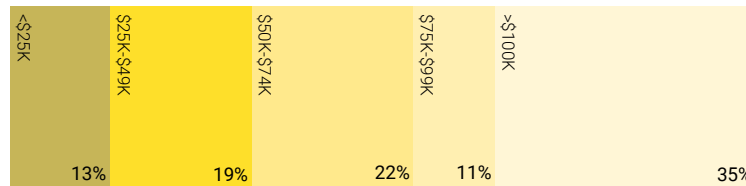


BY ETHNICITY OVER TIME

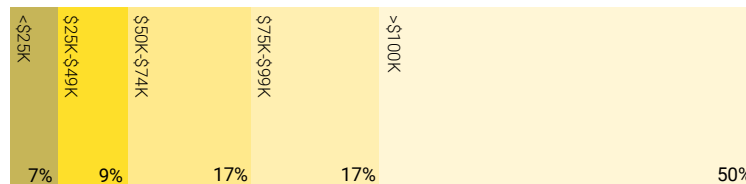


The numbers and percentages above are based on 9.876M total alpine ski participants
SIA Participation Study 2017

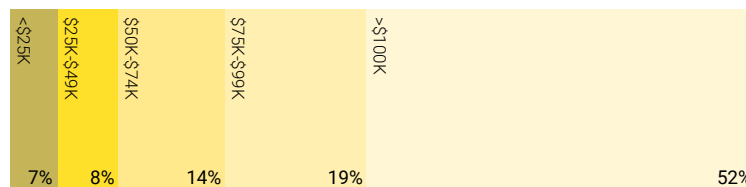
BY INCOME & FREQUENCY PER YEAR



One Time

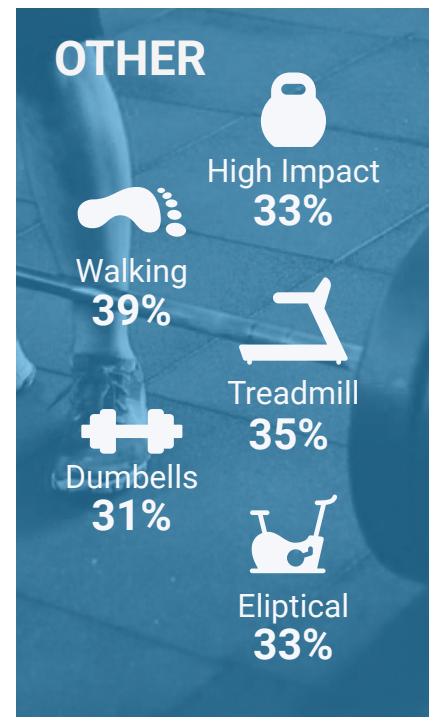
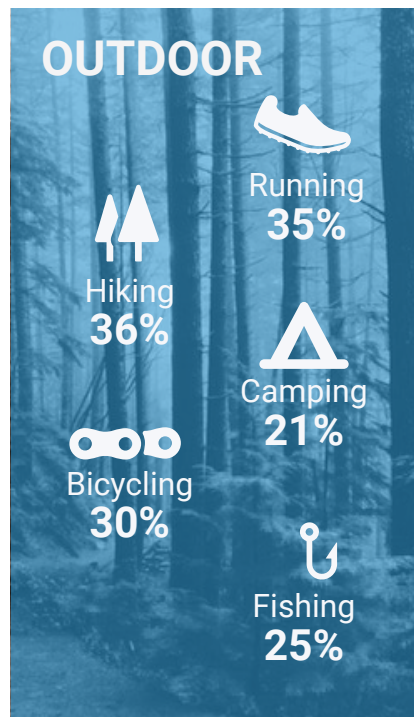


2-8 Times



9+ Times

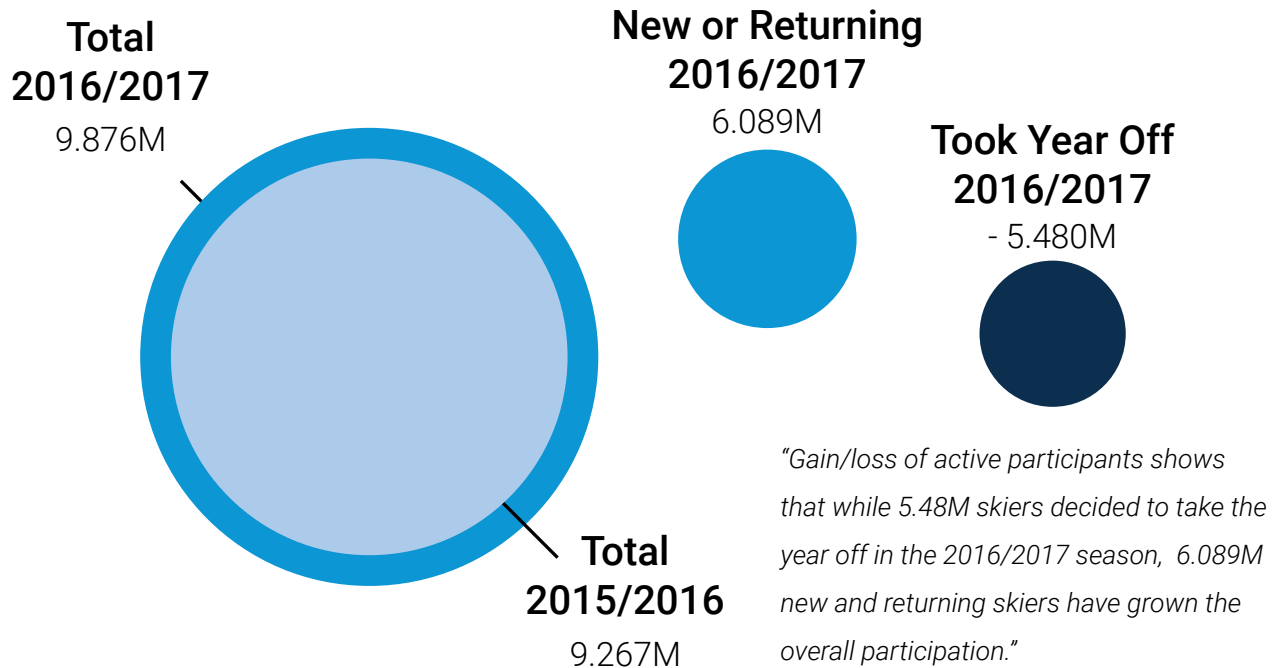
CROSSOVER ACTIVITIES



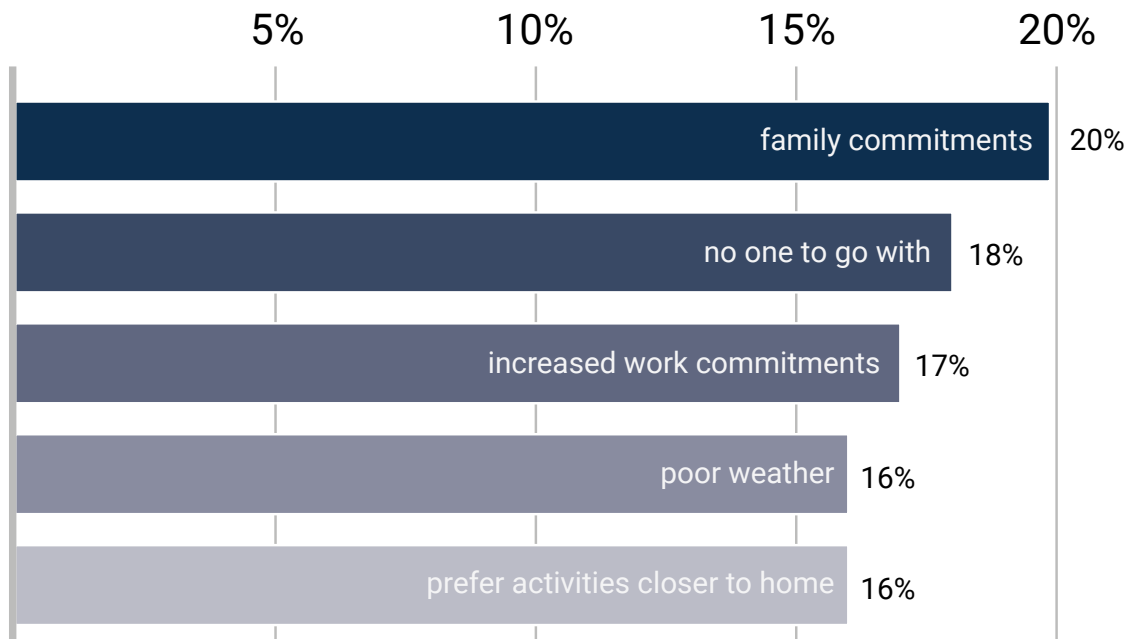
The numbers and percentages above are based on 9.876M total alpine ski participants

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GAIN/LOSS OF ACTIVE PARTICIPANTS



TOP BARRIERS TO PARTICIPATION



The numbers and percentages above are based on 9.876M total alpine ski participants
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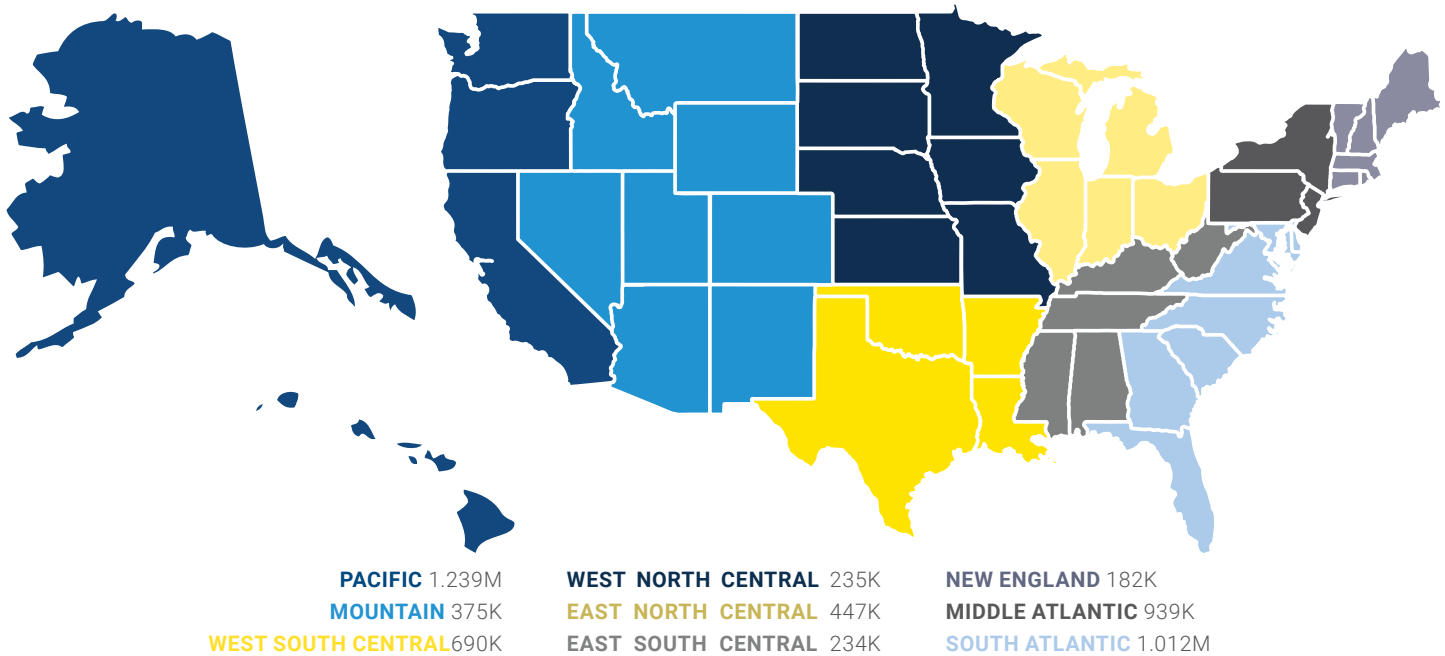
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FREESKI PARTICIPATION AND DEMOGRAPHICS

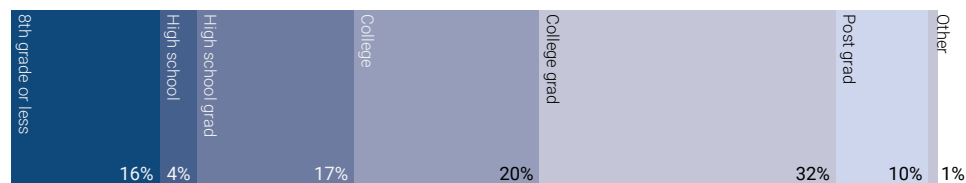
TOTAL PARTICIPANTS: 5.353M

FREESKIING BY REGION

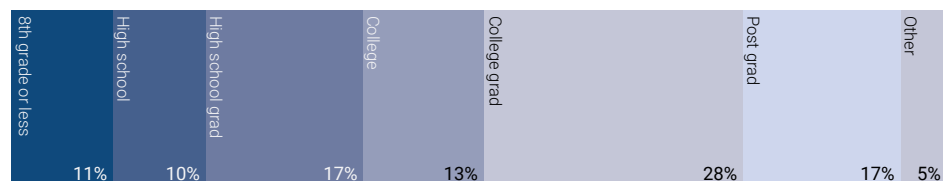


"The Pacific Region (CA, OR, WA) has the largest share of freeskiers at 23.1% and 17% of all freeskiers are Hispanics. More than 1/3 of all freeskiers that go 9 or more times are ages 17 and under."

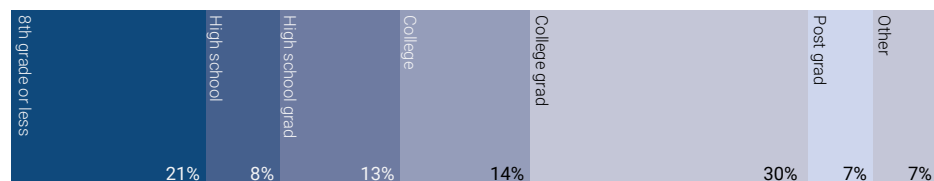
BY EDUCATION & FREQUENCY PER YEAR



One Time



2-8 Times

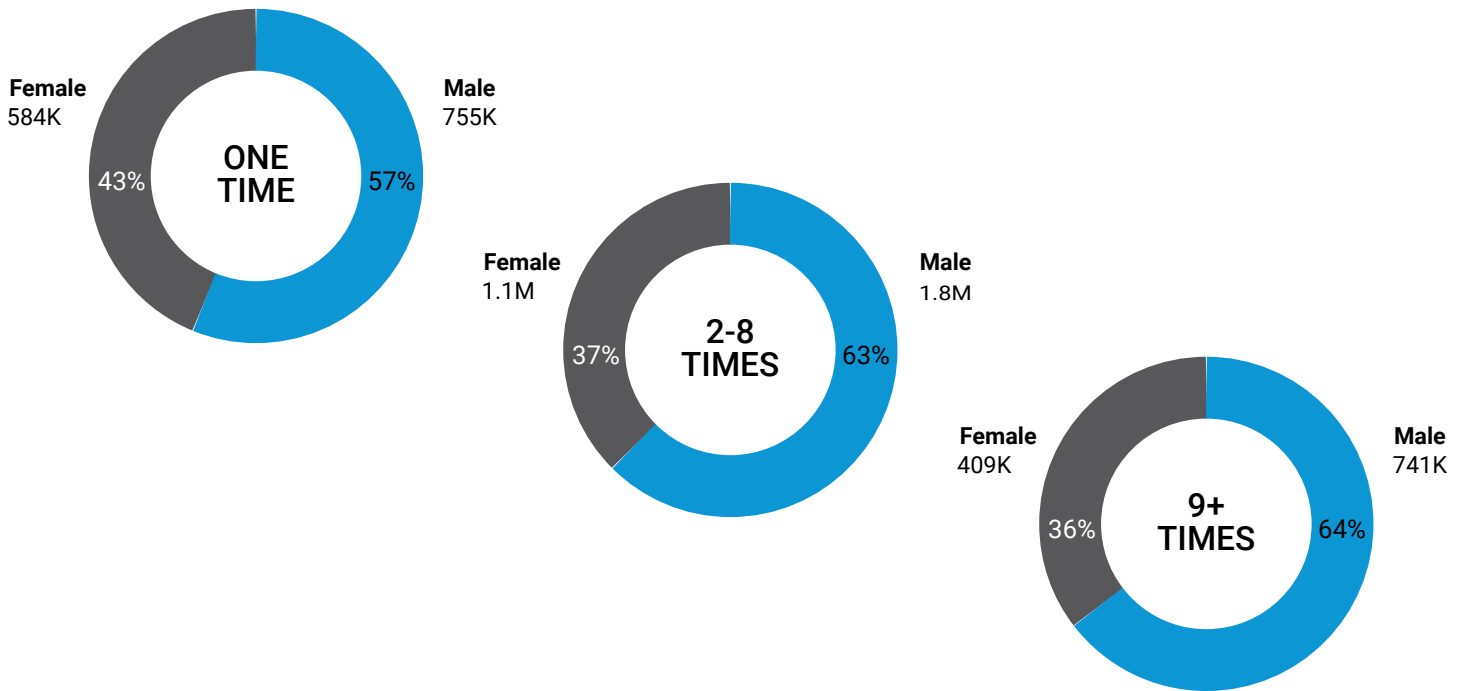


9+ Times

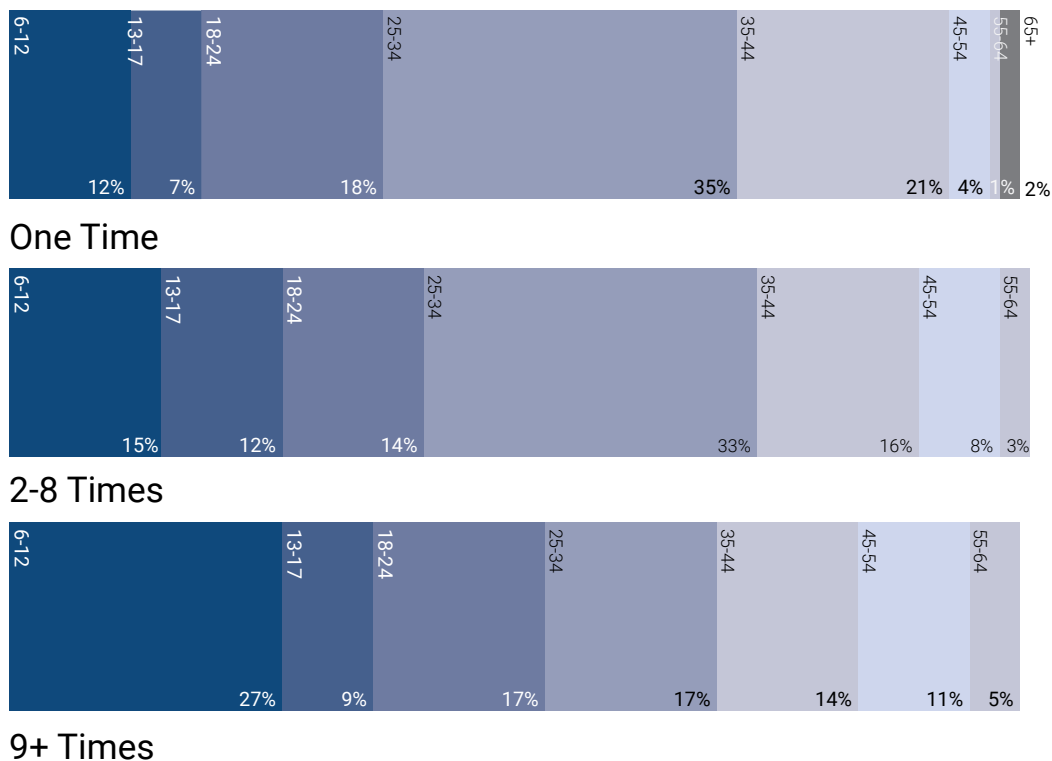
The numbers and percentages above are based on 5.353M total freeski participants

SIA Participation Study 2017

BY GENDER & FREQUENCY PER YEAR



BY AGE & FREQUENCY PER YEAR



The numbers and percentages above are based on 5.353M total freeski participants
SIA Participation Study 2017

BY ETHNICITY & FREQUENCY PER YEAR



One Time

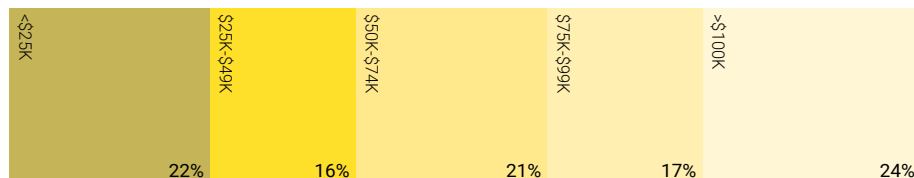


2-8 Times

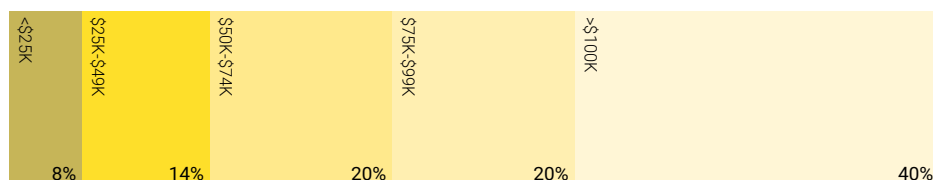


9+ Times

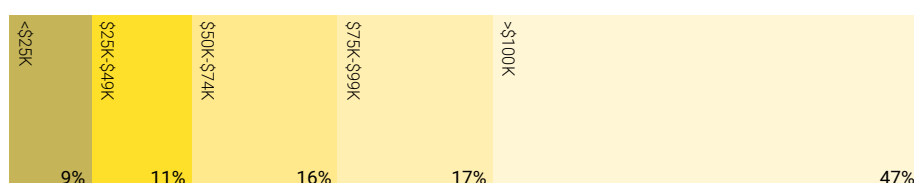
BY INCOME & FREQUENCY PER YEAR



One Time



2-8 Times

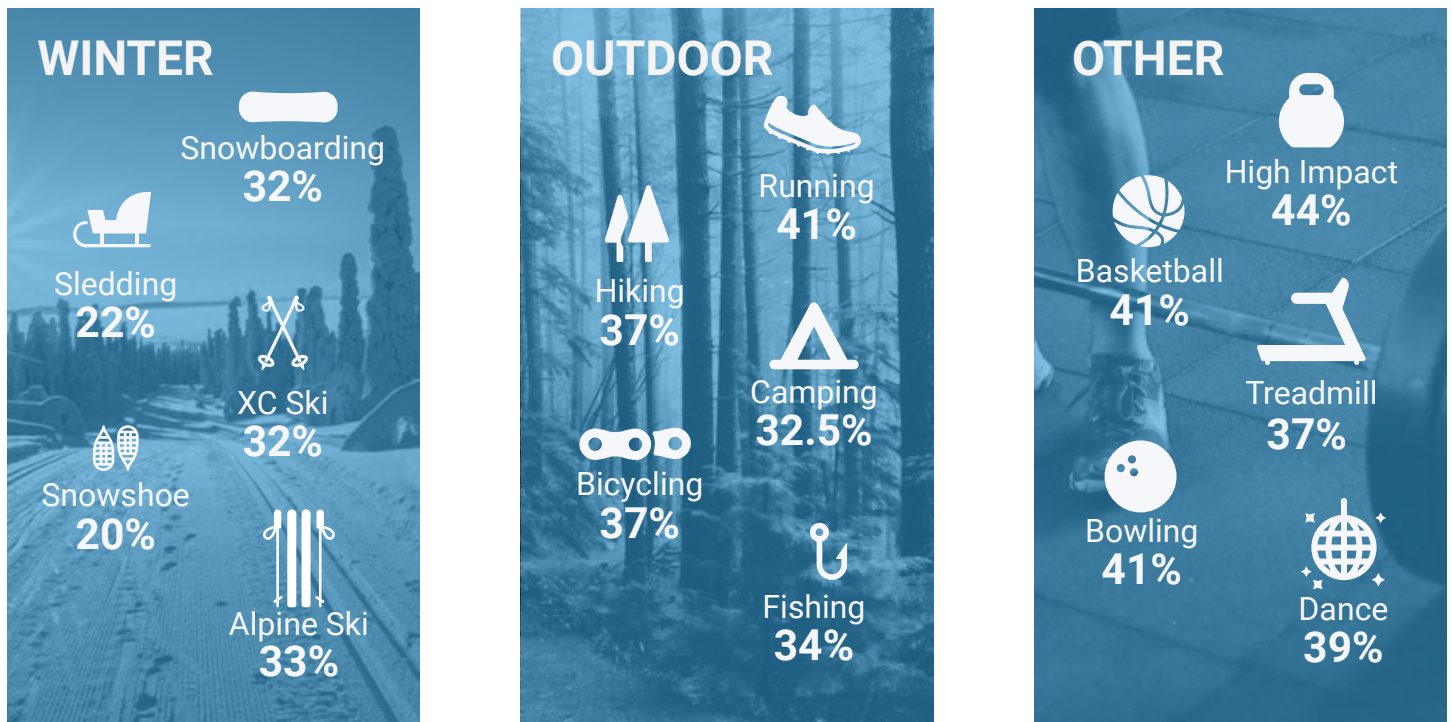


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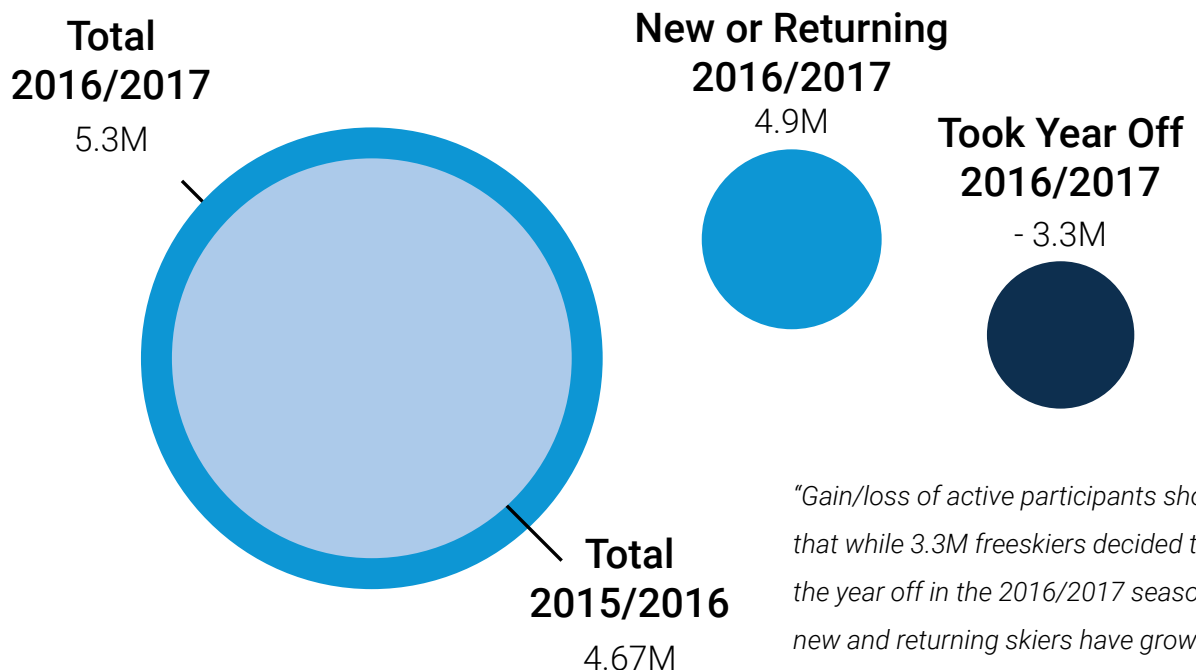
The numbers and percentages above are based on 5.353M total freeski participants

SIA Participation Study 2017

CROSSOVER ACTIVITIES



GAIN/LOSS OF ACTIVE PARTICIPANTS



"Gain/loss of active participants shows that while 3.3M freeskiers decided to take the year off in the 2016/2017 season, 4.9M new and returning skiers have grown the overall participation."

The numbers and percentages above are based on 5.353M total freeski participants
SIA Participation Study 2017



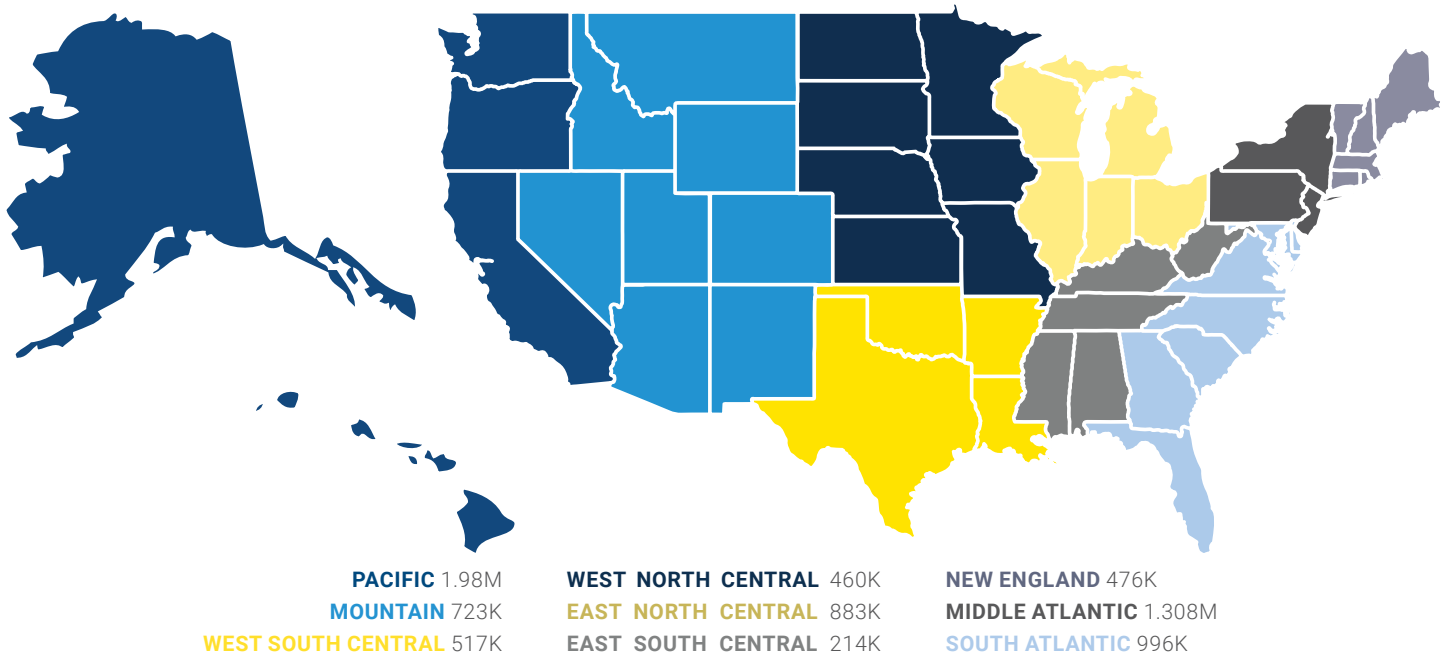
SNOWBOARD PARTICIPATION AND DEMOGRAPHICS

TOTAL PARTICIPANTS: 7.557M



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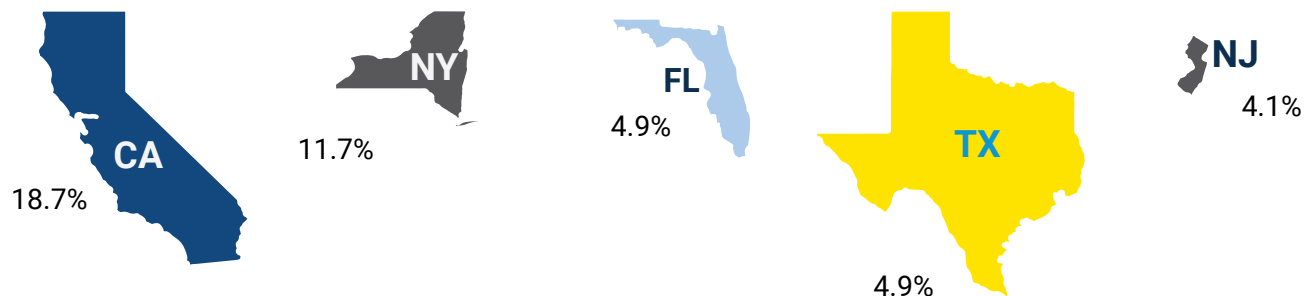
SNOWBOARDING BY REGION



"As a percentage of Snowboarders, the youth (ages 17 and under) have grown 6% and are 34.3% share of all snowboarders. Female snowboarders of this age group grew from 792K to 846K."

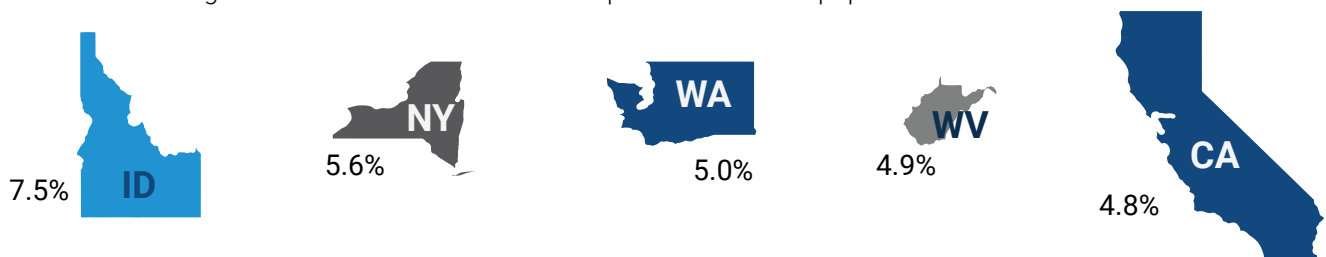
STATES WITH GREATEST SHARE OF TOTAL SNOWBOARD POPULATION

Of the 7.5M snowboard participants in the US, these states have the greatest percentage of snowboarders by origin



STATES WITH GREATEST PERCENTAGE OF SNOWBOARDERS

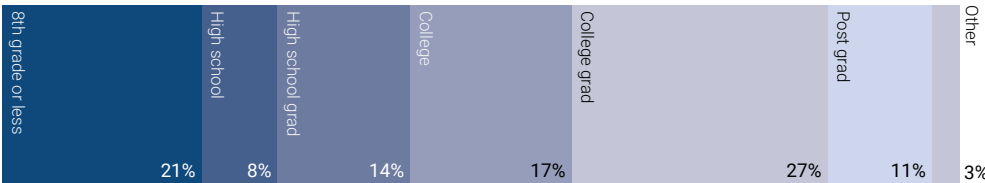
These states have the greatest number of snowboarders per the total state population



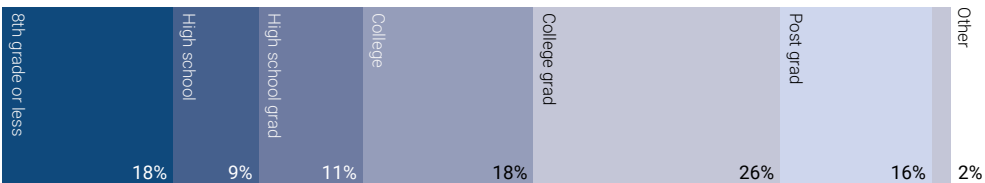
The numbers and percentages above are based on 7.557M total snowboard participants

SIA Participation Study 2017

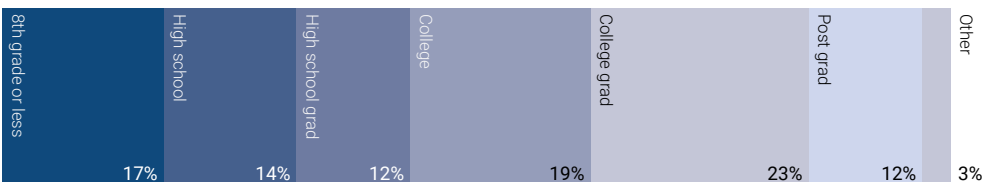
BY EDUCATION & FREQUENCY PER YEAR



One Time

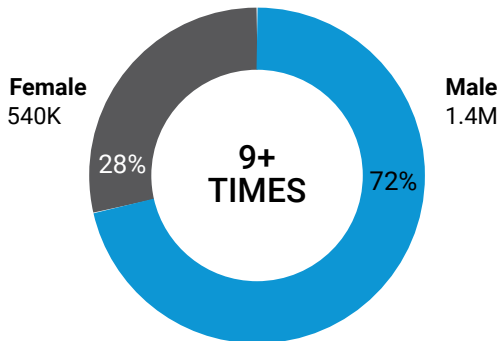
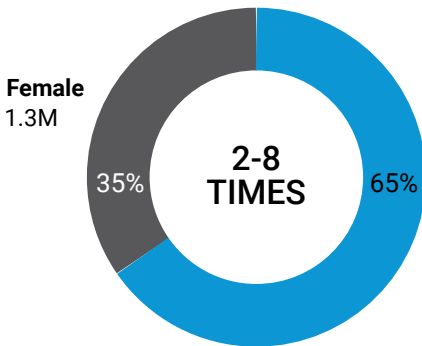
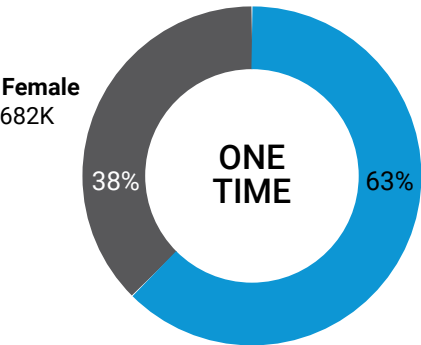


2-8 Times



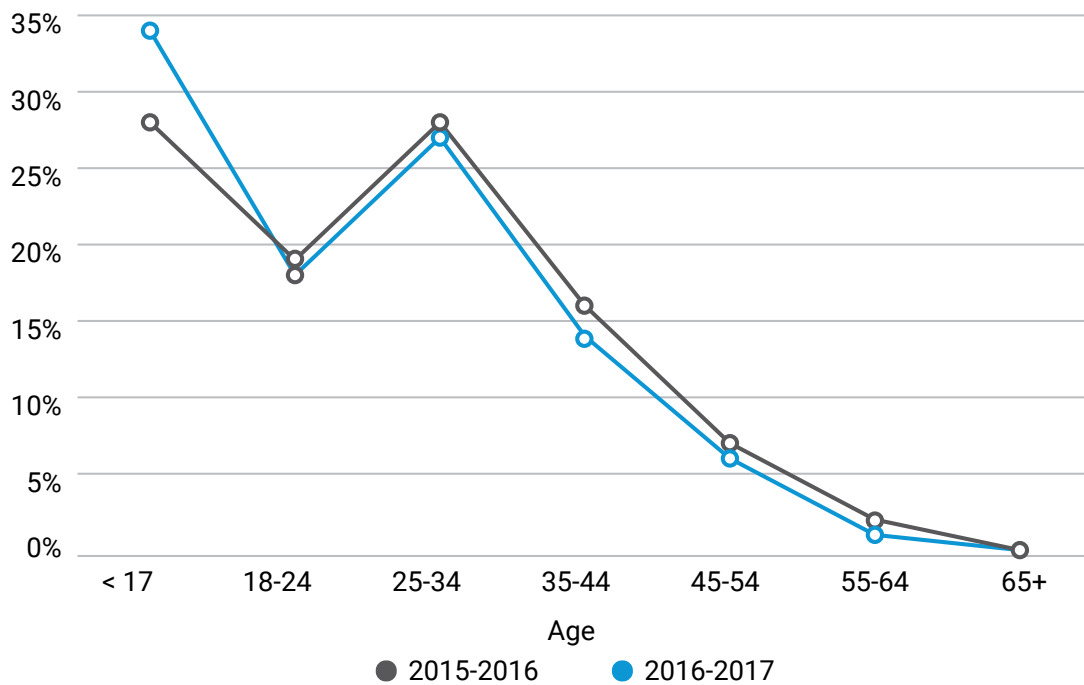
9+ Times

BY GENDER & FREQUENCY PER YEAR

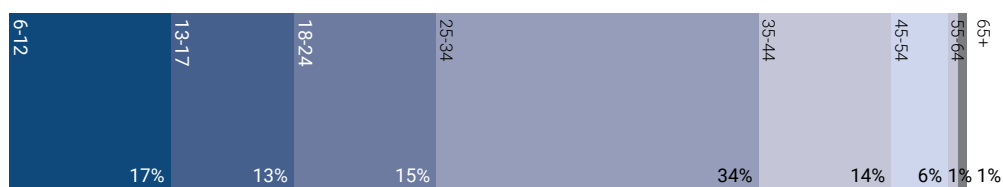


The numbers and percentages above are based on 7.557M total snowboard participants
SIA Participation Study 2017

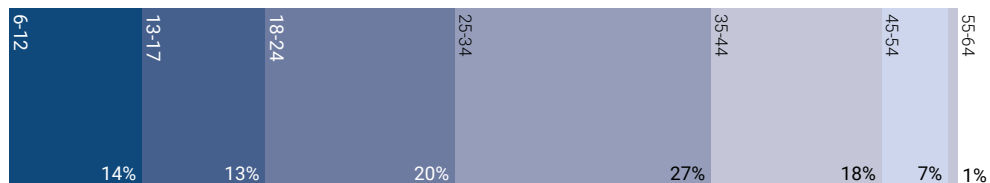
BY AGE OVER TIME



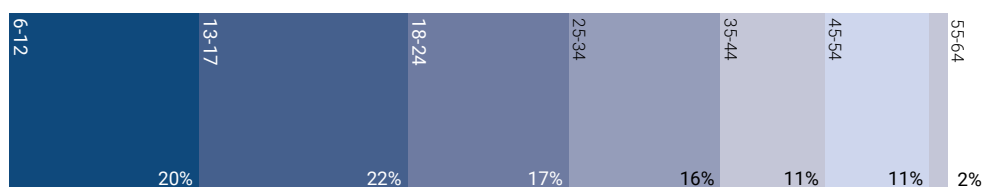
BY AGE & FREQUENCY PER YEAR



One Time



2-8 Times



9+ Times

The numbers and percentages above are based on 7.557M total snowboard participants
SIA Participation Study 2017

BY ETHNICITY & FREQUENCY PER YEAR



One Time

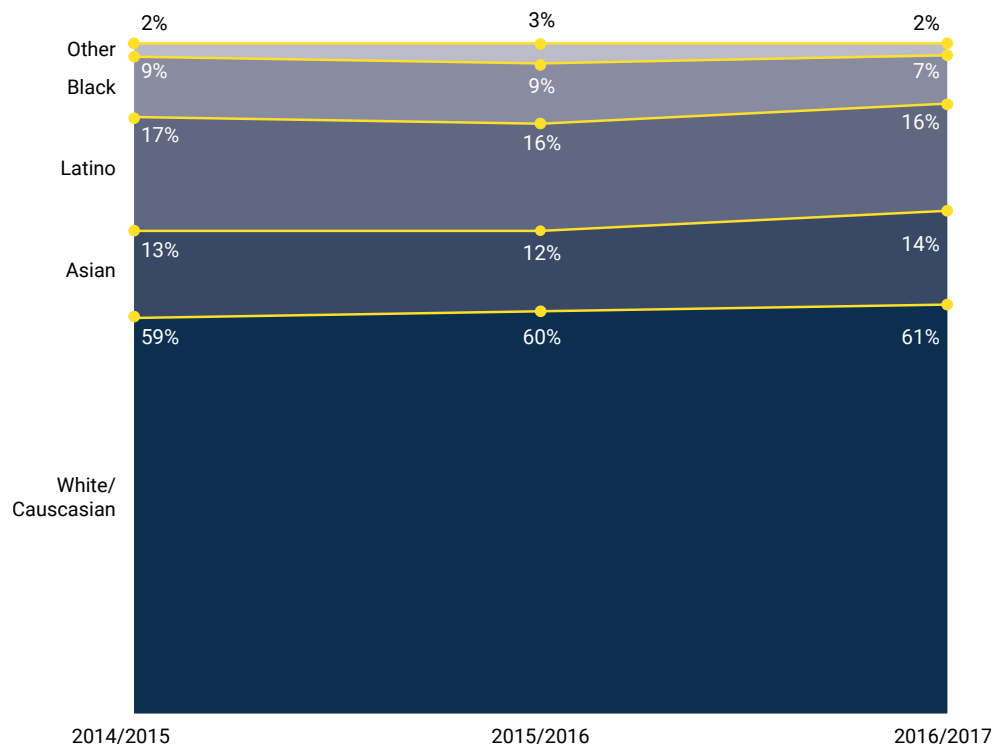


2-8 Times



9+ Times

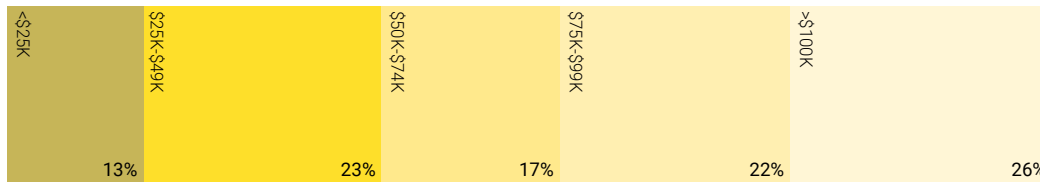
BY ETHNICITY OVER TIME



The numbers and percentages above are based on 7.557M total snowboard participants

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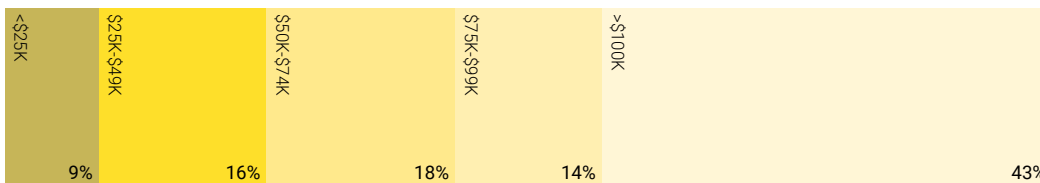
BY INCOME & FREQUENCY PER YEAR



One Time

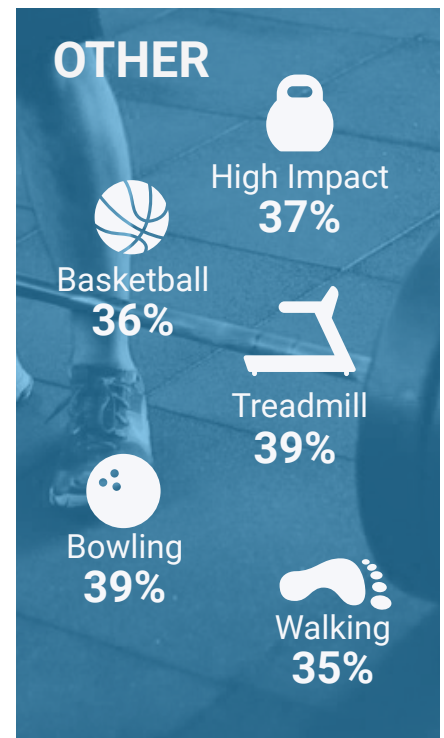
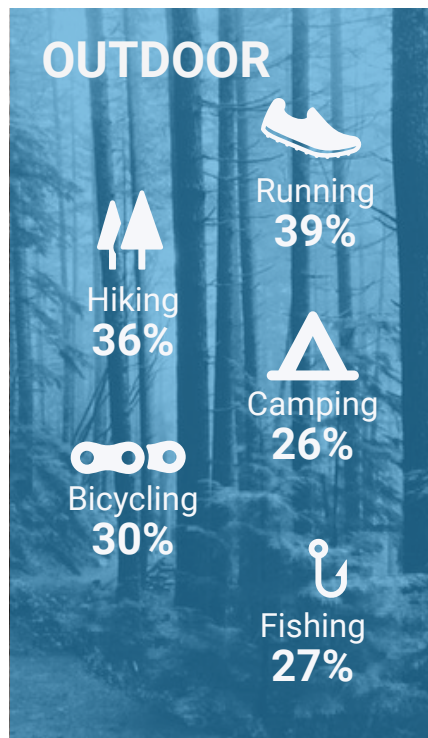


2-8 Times



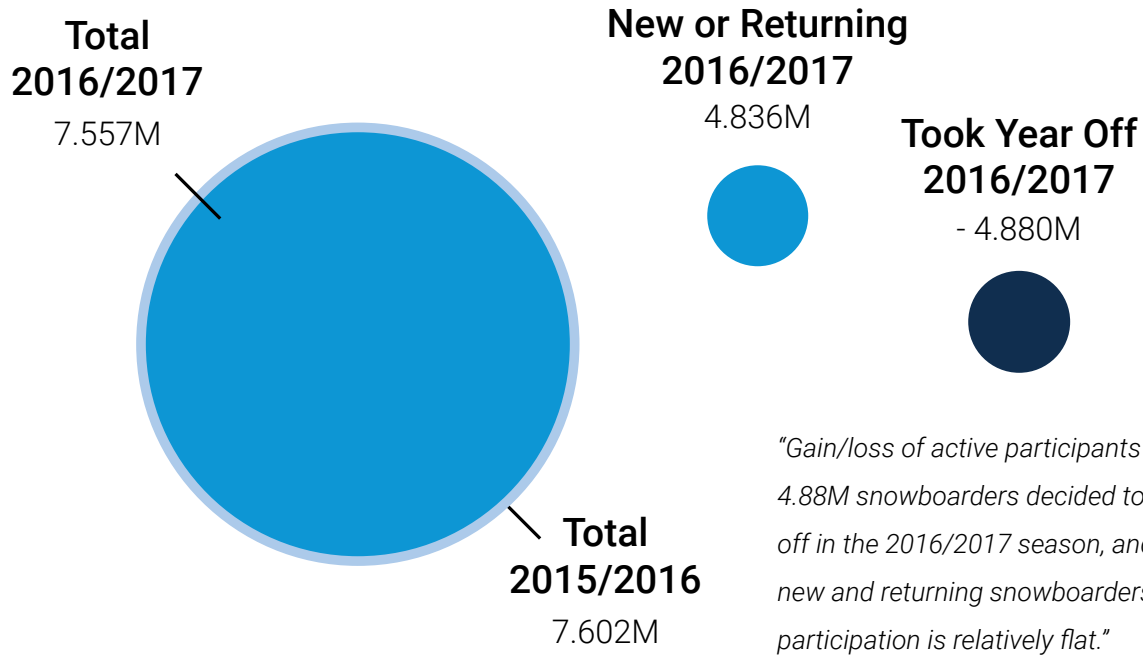
9+ Times

CROSSOVER ACTIVITIES

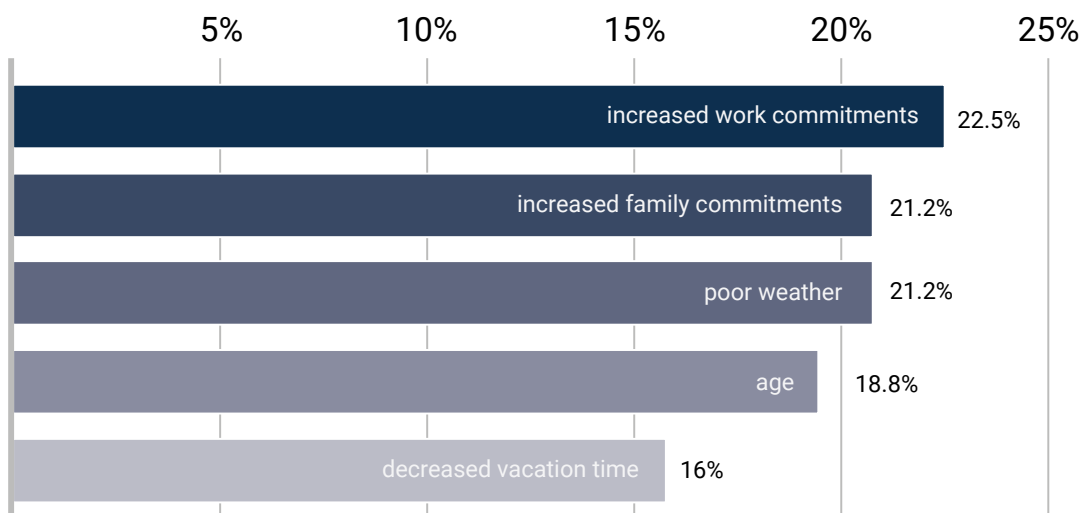


The numbers and percentages above are based on 7.557M total snowboard participants
SIA Participation Study 2017

GAIN/LOSS OF ACTIVE PARTICIPANTS



TOP BARRIERS TO PARTICIPATION



The numbers and percentages above are based on 7.557M total snowboard participants
SIA Participation Study 2017



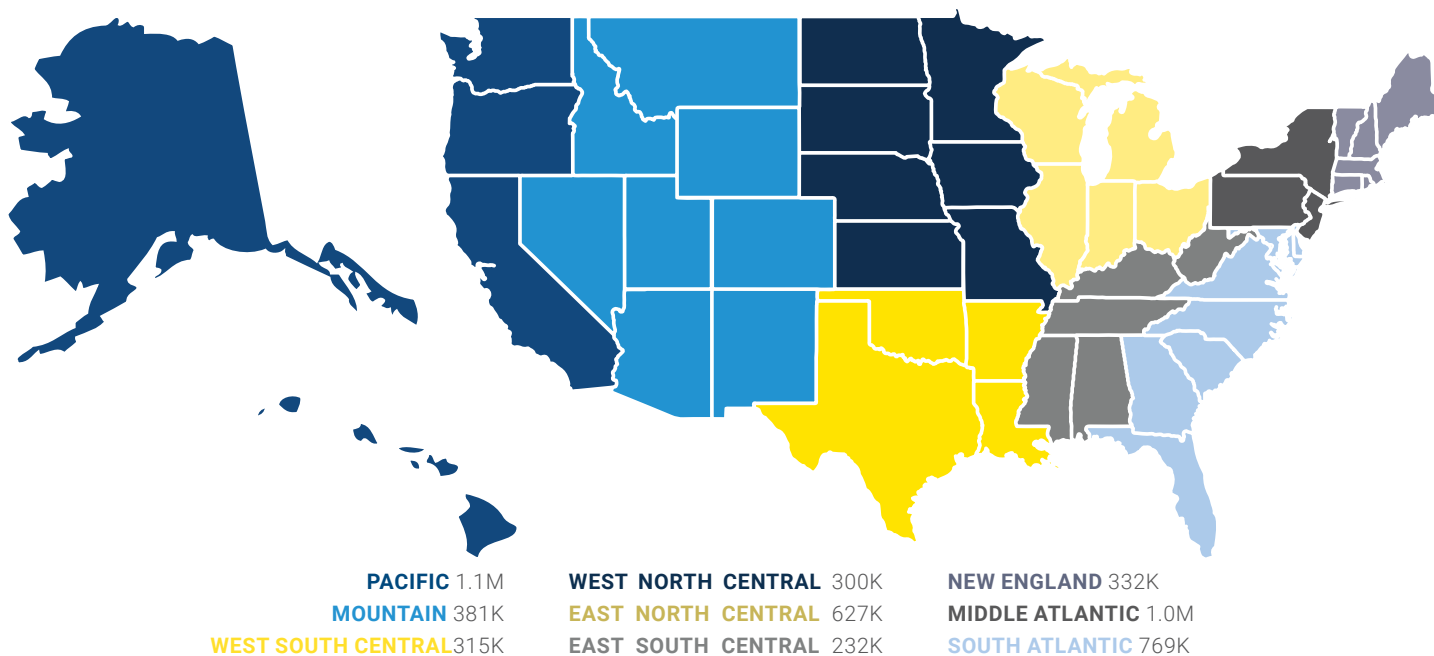
XC SKI PARTICIPATION AND DEMOGRAPHICS

TOTAL PARTICIPANTS: 5.059M



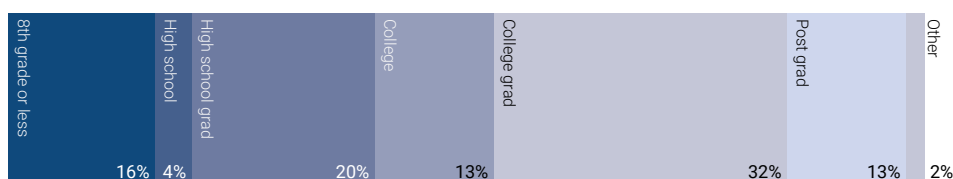
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XC SKI BY REGION

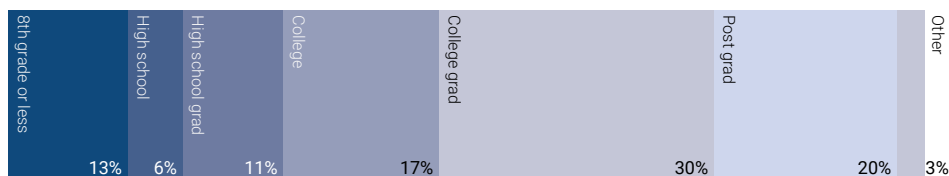


"The largest age segment for XC skiers is ages 25-34."

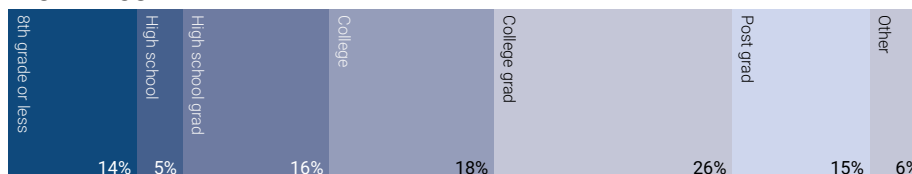
BY EDUCATION & FREQUENCY PER YEAR



One Time



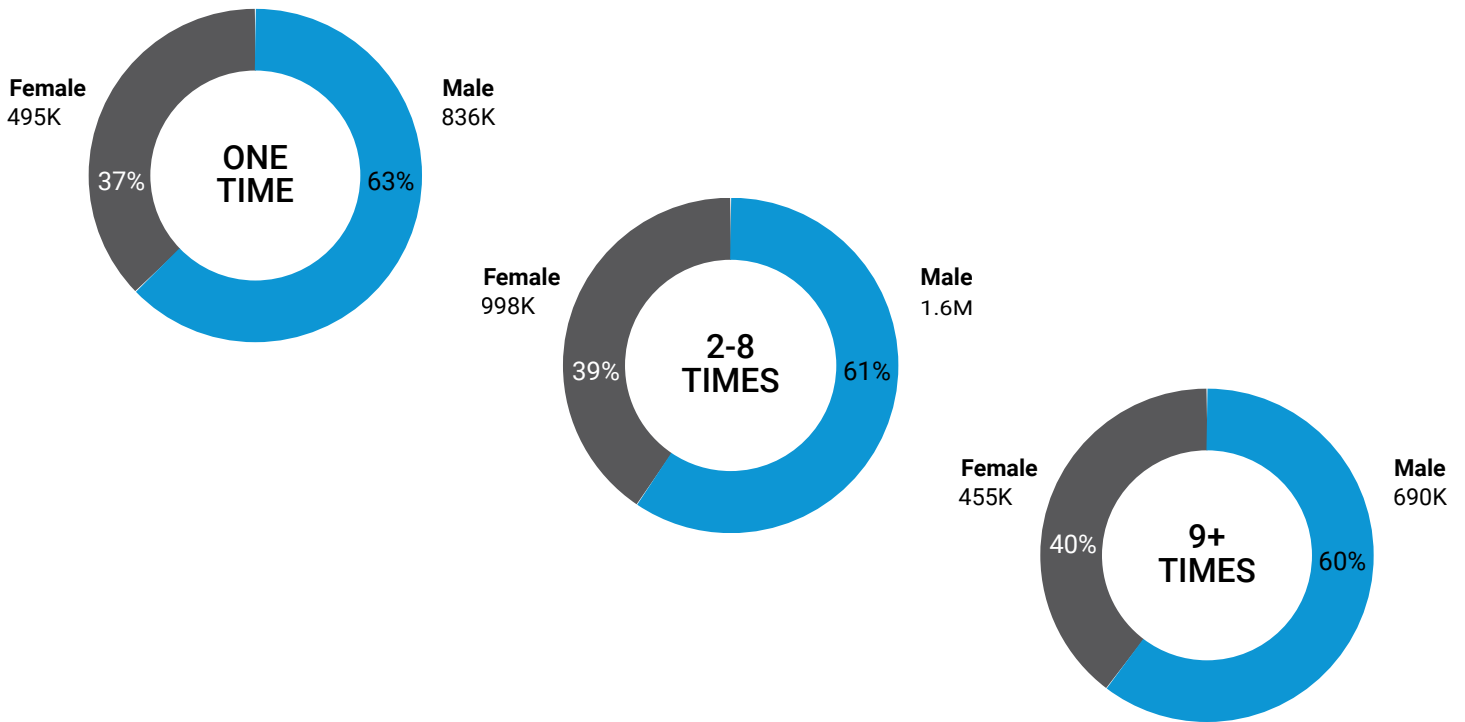
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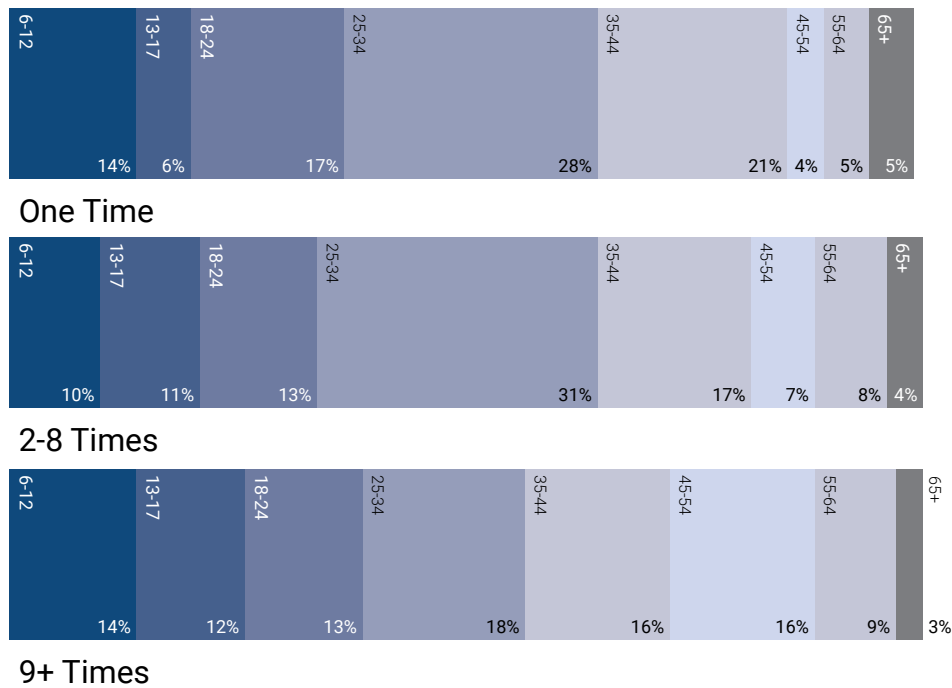
9+ Times

The numbers and percentages above are based on 5.059M total XC Ski participants
SIA Participation Study 2017

BY GENDER & FREQUENCY PER YEAR



BY AGE & FREQUENCY PER YEAR



The numbers and percentages above are based on 5.059M total XC Ski participants
SIA Participation Study 2017

BY ETHNICITY & FREQUENCY PER YEAR



One Time

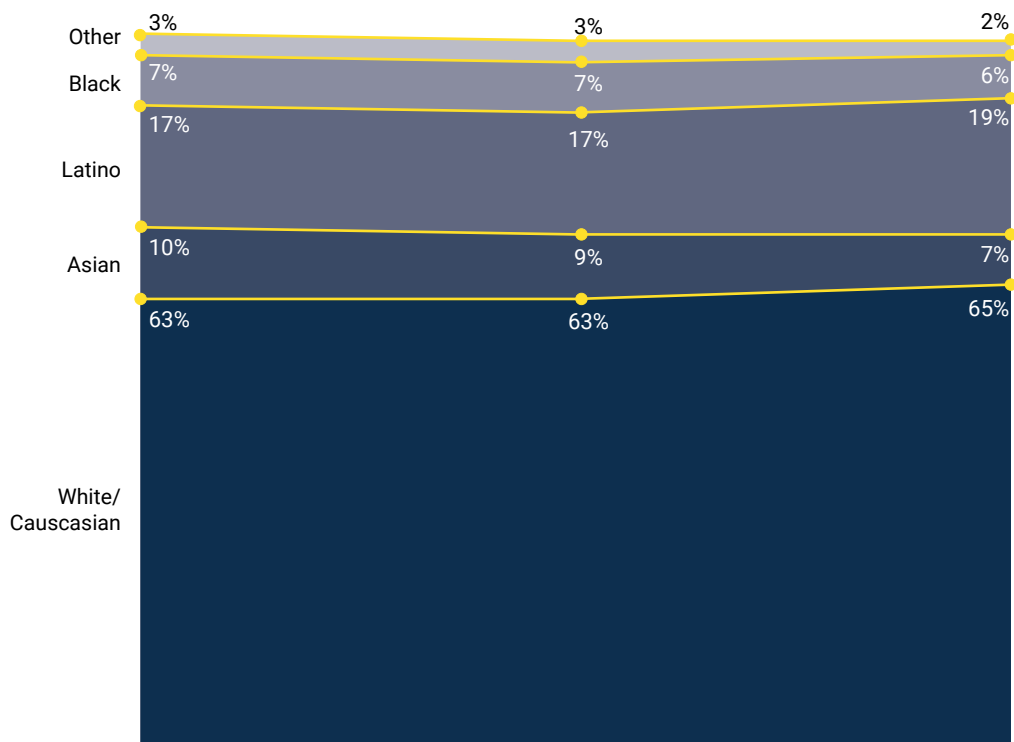


2-8 Times



9+ Times

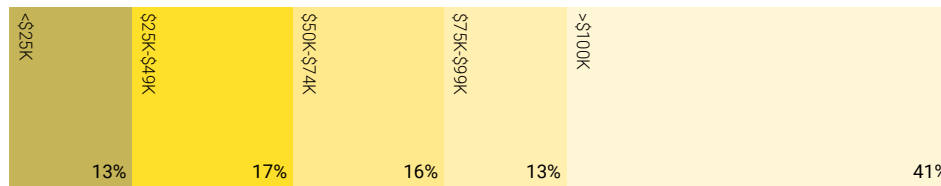
BY ETHNICITY OVER TIME



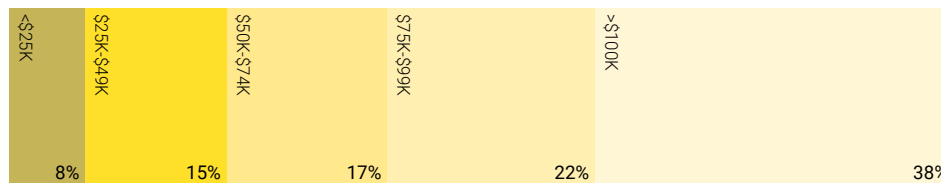
The numbers and percentages above are based on 5.059M total XC Ski participants

SIA Participation Study 2017

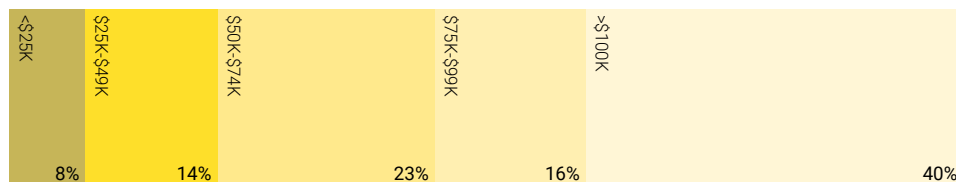
BY INCOME & FREQUENCY PER YEAR



One Time

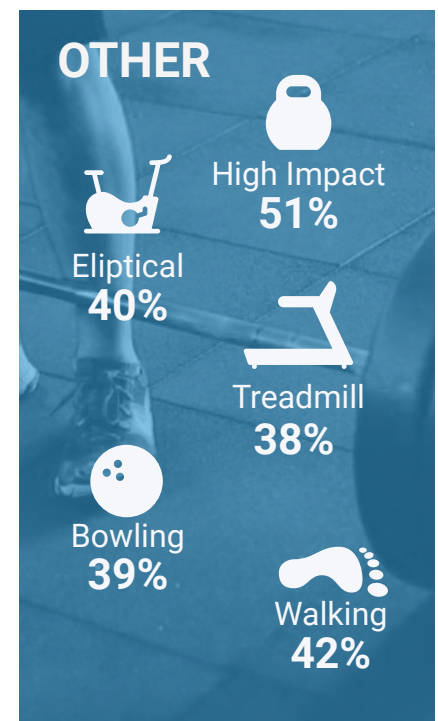
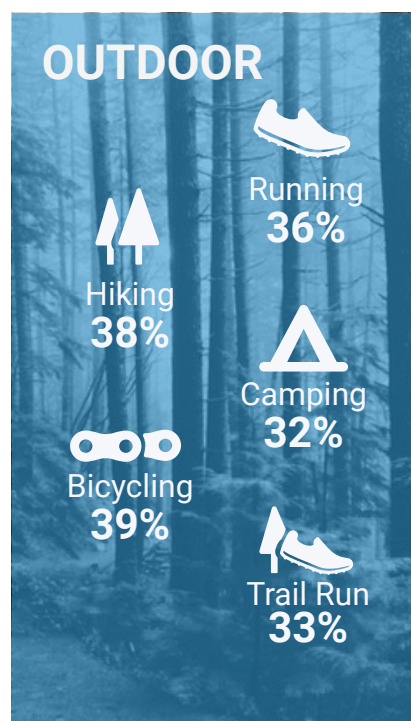


2-8 Times



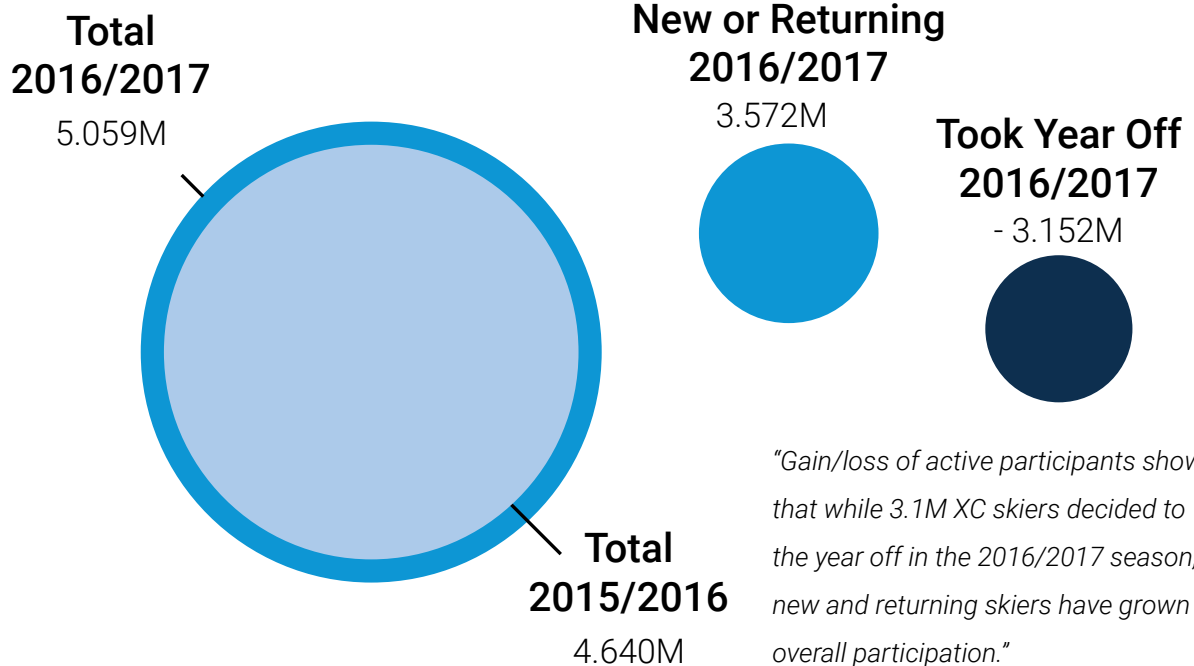
9+ Times

CROSSOVER ACTIVITIES

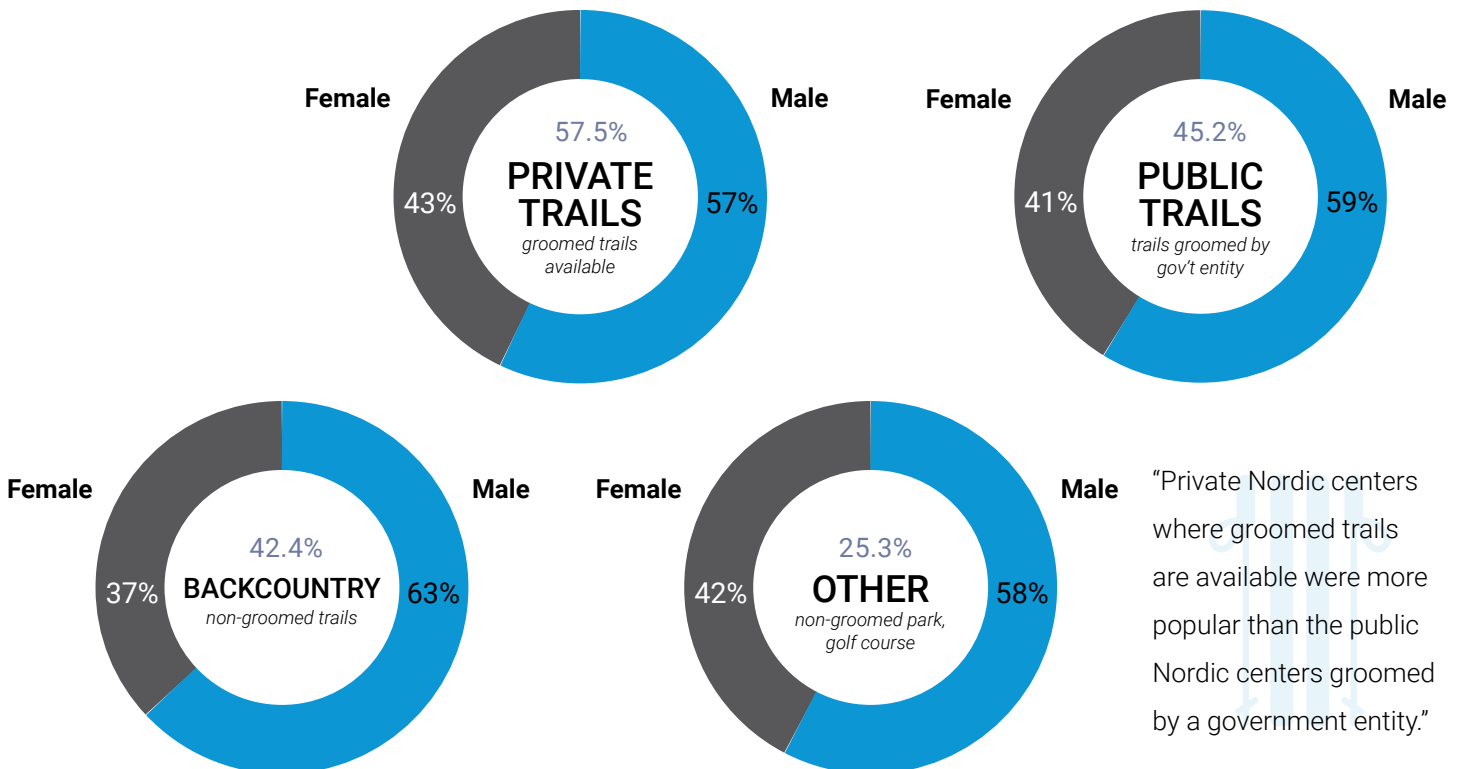


The numbers and percentages above are based on 5.059M total XC Ski participants
SIA Participation Study 2017

GAIN/LOSS OF ACTIVE PARTICIPANTS



XC SKI TRAILS



The numbers and percentages above are based on 5.059M total XC Ski participants
SIA Participation Study 2017

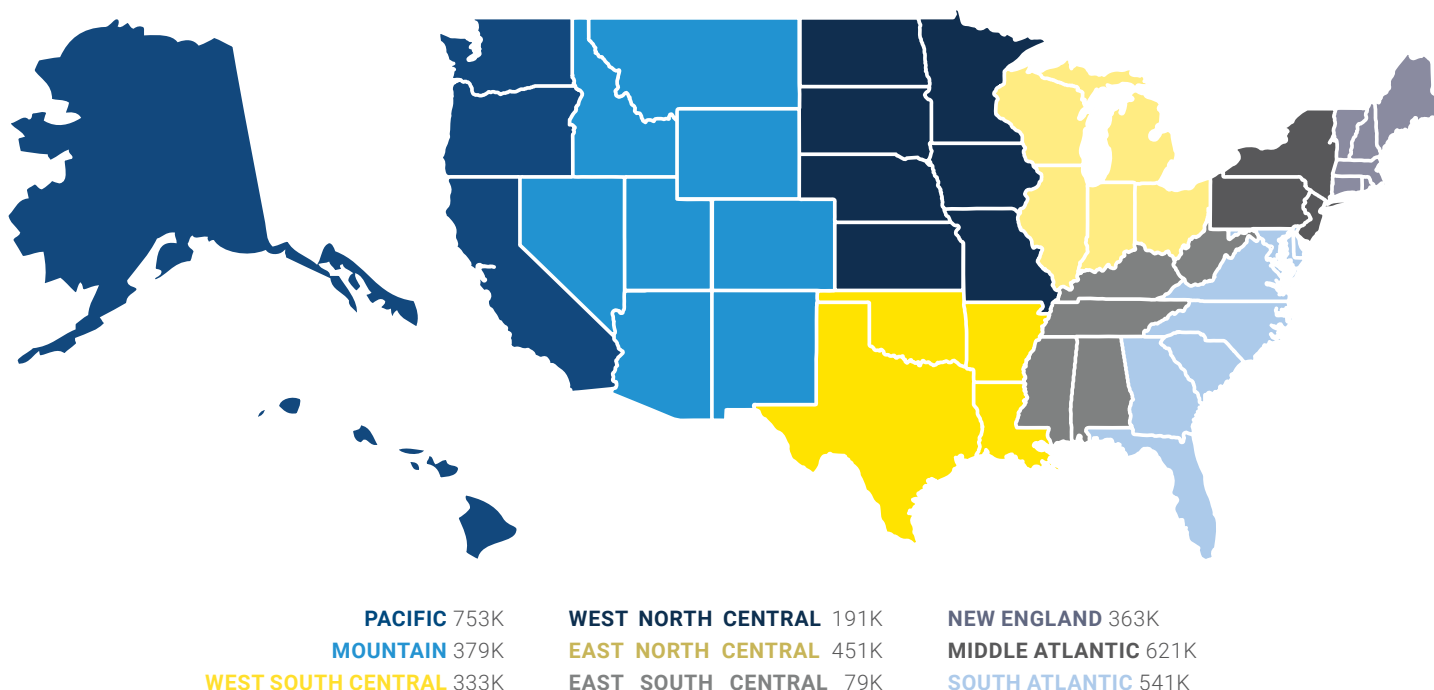
SNOWSHOE PARTICIPATION AND DEMOGRAPHICS

TOTAL PARTICIPANTS: 3.711M

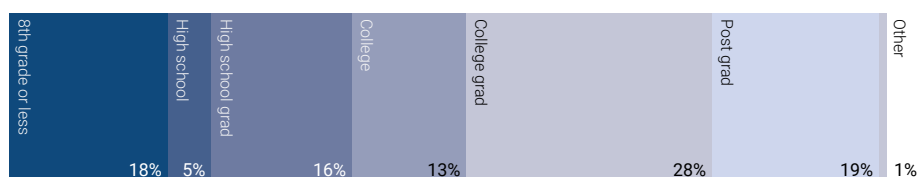


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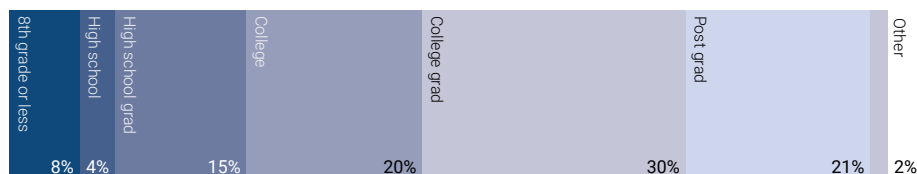
SNOWSHOE BY REGION



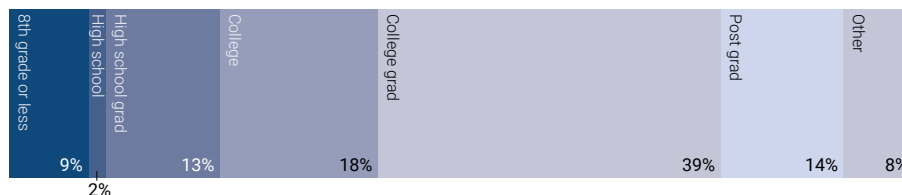
BY EDUCATION & FREQUENCY PER YEAR



One Time



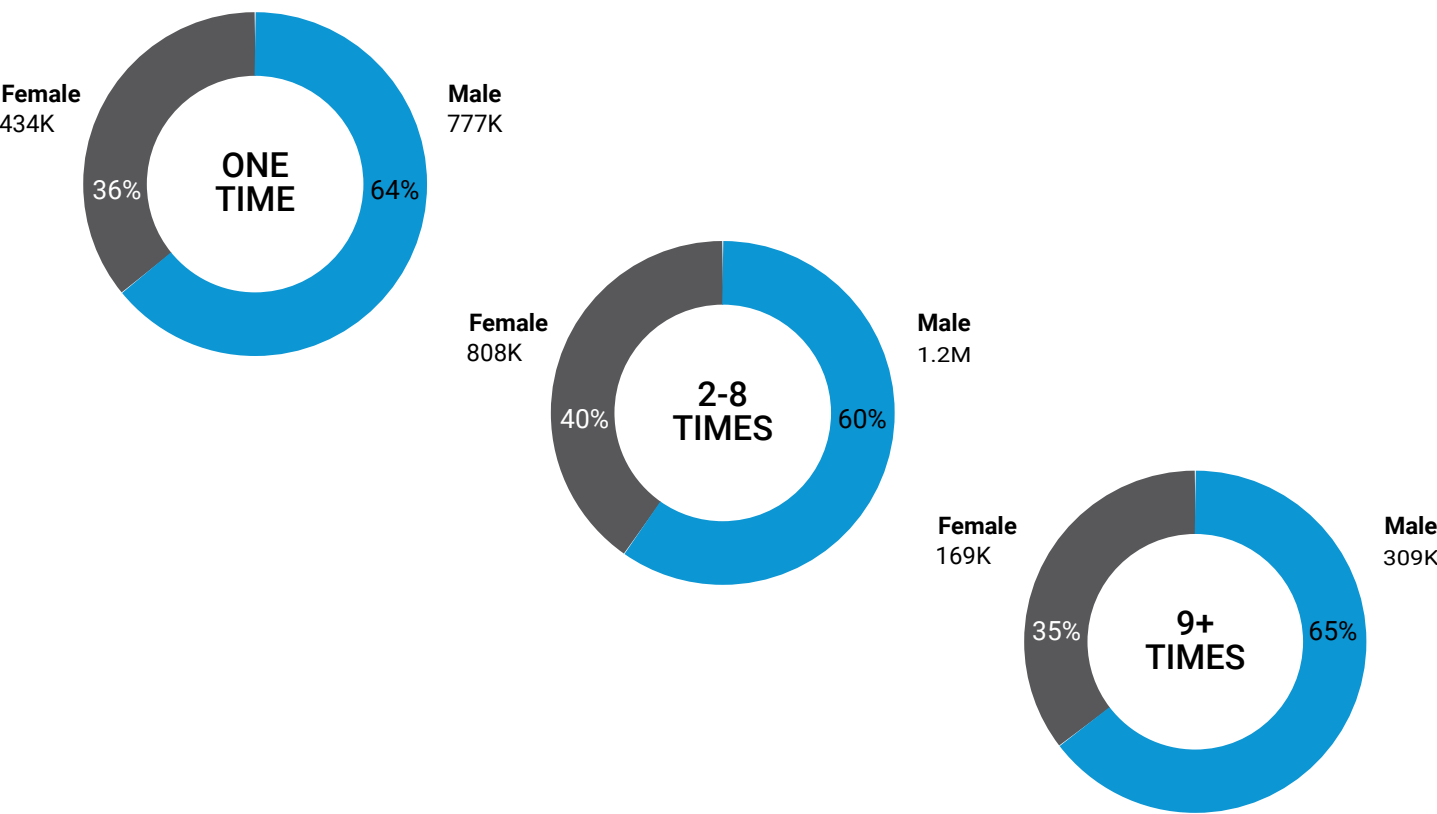
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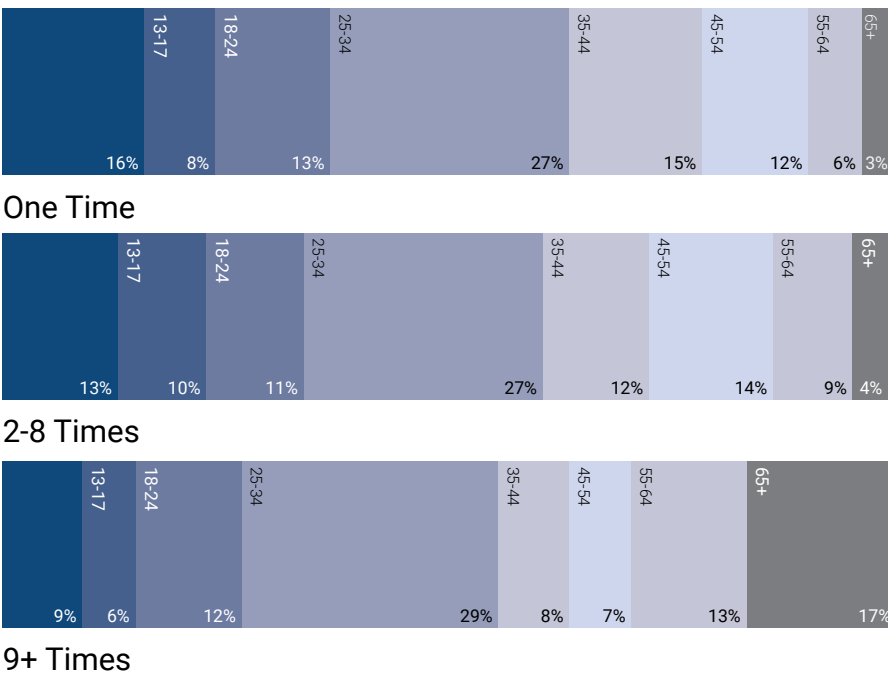
9+ Times

The numbers and percentages above are based on 3.711M total snowshoe participants
SIA Participation Study 2017

BY GENDER & FREQUENCY PER YEAR



BY AGE & FREQUENCY PER YEAR



The numbers and percentages above are based on 3.711M total snowshoe participants
 SIA Participation Study 2017

BY ETHNICITY & FREQUENCY PER YEAR



One Time

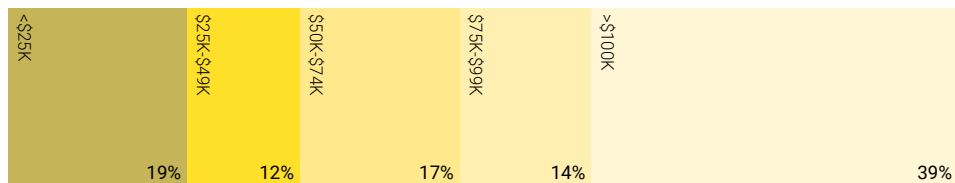


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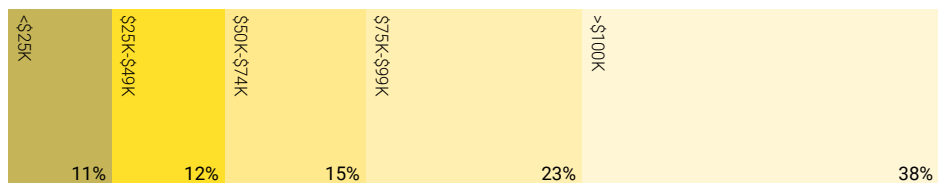


9+ Times

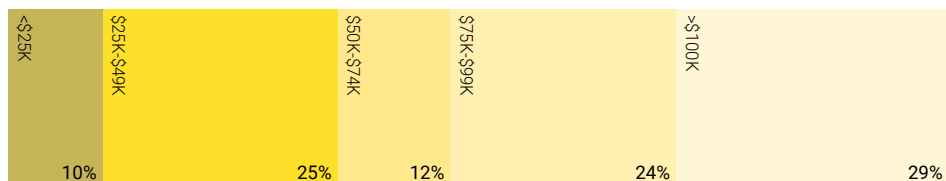
BY INCOME & FREQUENCY PER YEAR



One Time



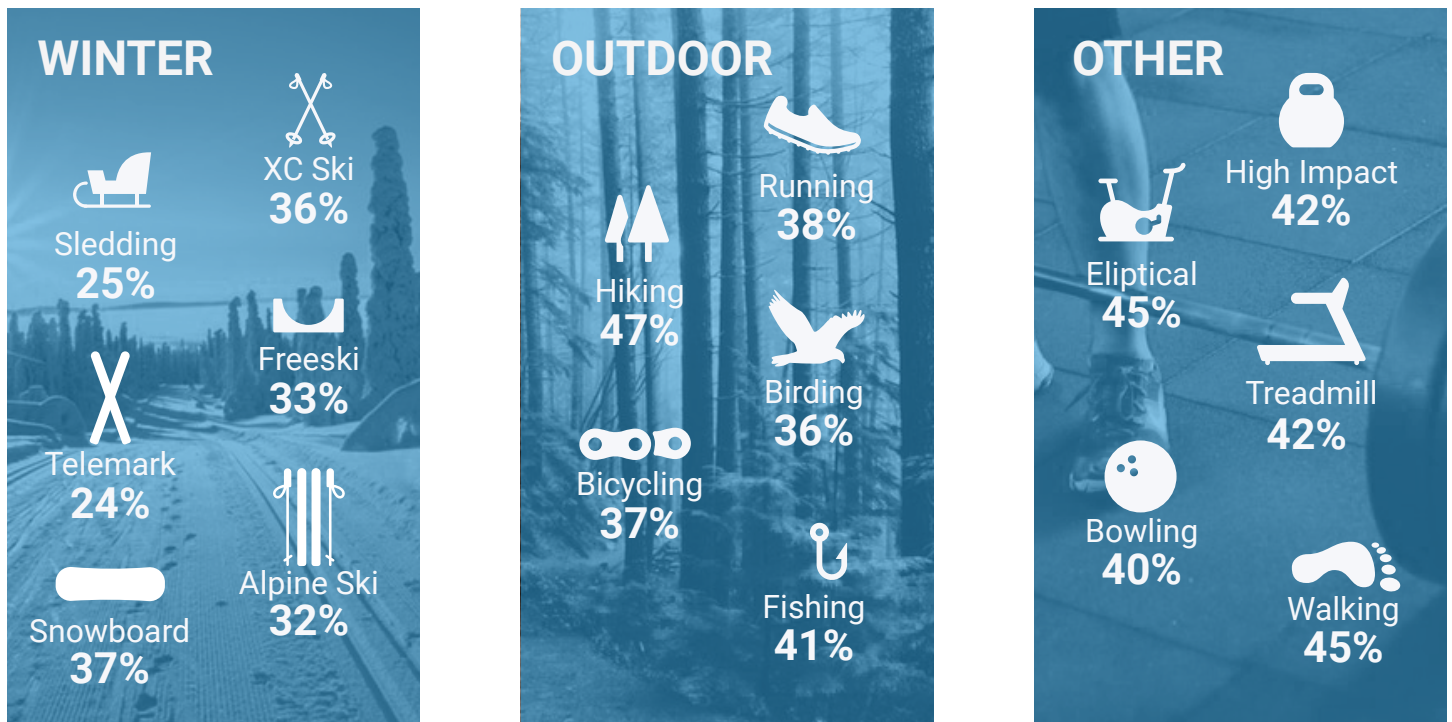
2-8 Times



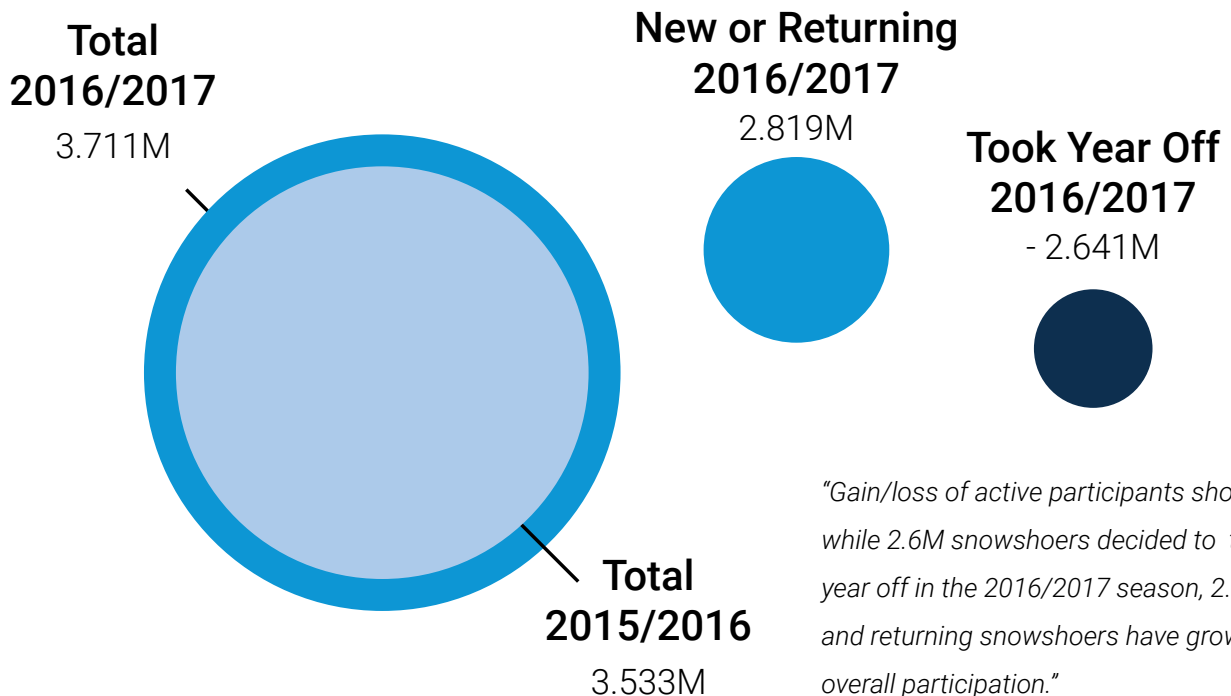
9+ Times

The numbers and percentages above are based on 3.711M total snowshoe participants
SIA Participation Study 2017

CROSSOVER ACTIVITIES



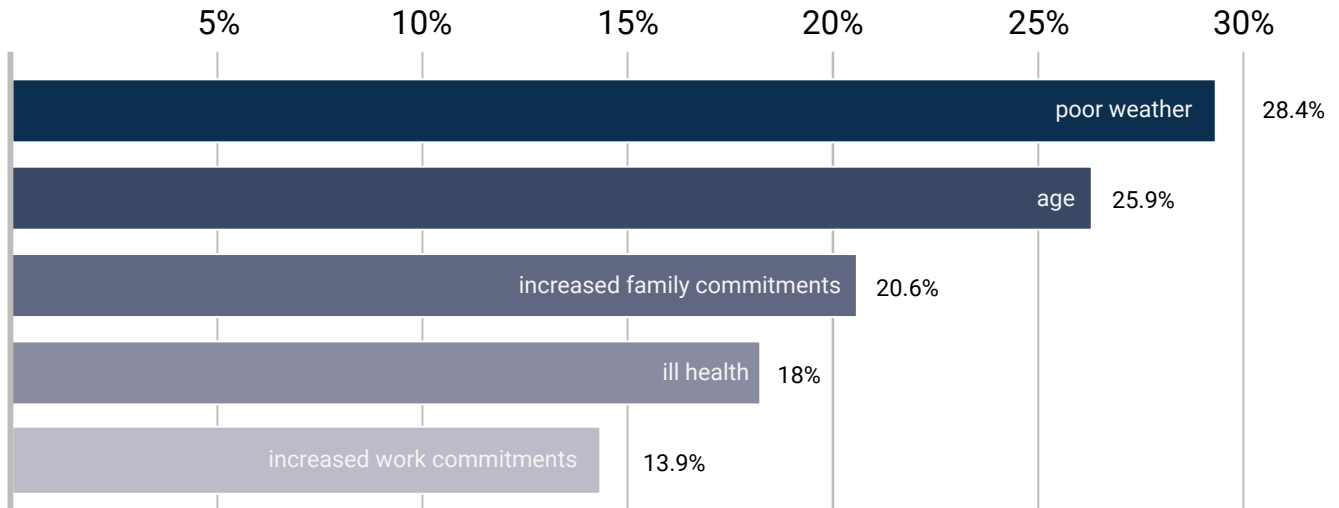
GAIN/LOSS OF ACTIVE PARTICIPANTS



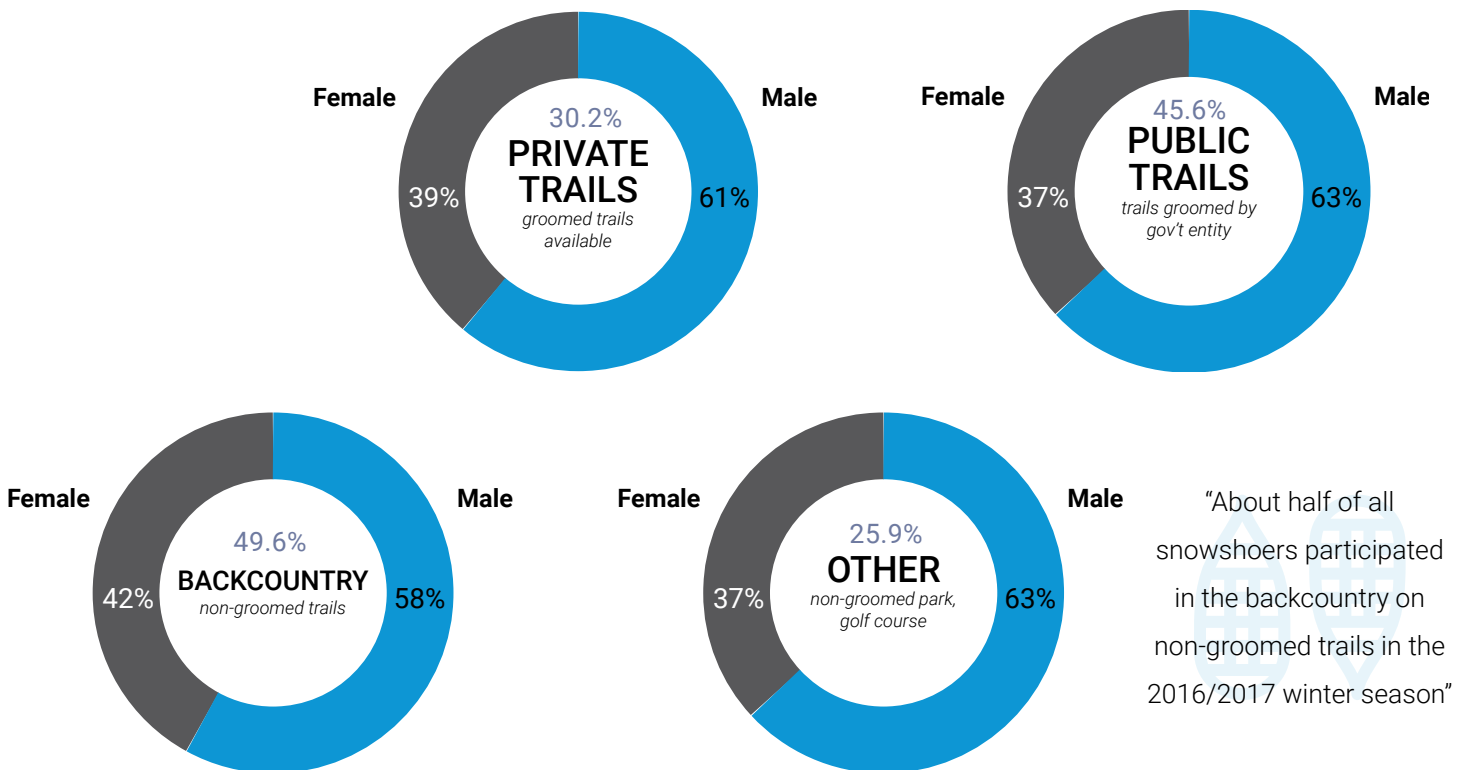
"Gain/loss of active participants shows that while 2.6M snowshoers decided to take the year off in the 2016/2017 season, 2.8M new and returning snowshoers have grown the overall participation."

The numbers and percentages above are based on 3.711M total snowshoe participants
SIA Participation Study 2017

TOP BARRIERS TO PARTICIPATION



SNOWSHOE TRAILS



The numbers and percentages above are based on 3.711M total snowshoe participants
SIA Participation Study 2017



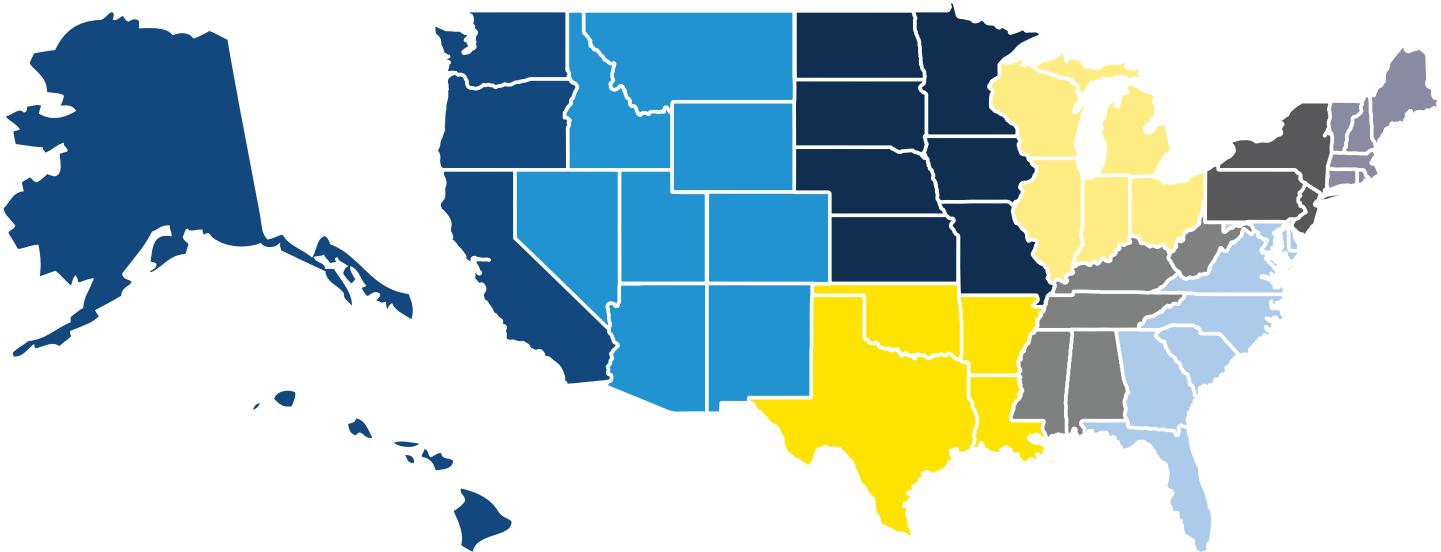
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BACKCOUNTRY PARTICIPATION AND DEMOGRAPHICS

SKIER PARTICIPANTS TOTAL:
LIFT-ACCESS: 3.2M; TRAIL ACCESS: 928K

BACKCOUNTRY SKIERS BY REGION



LIFT-ACCESS BACKCOUNTRY

PACIFIC 763K	WEST NORTH CENTRAL 135K	NEW ENGLAND 219K
MOUNTAIN 140K	EAST NORTH CENTRAL 427K	MIDDLE ATLANTIC 716K
WEST SOUTH CENTRAL 258K	EAST SOUTH CENTRAL 47K	SOUTH ATLANTIC 506K

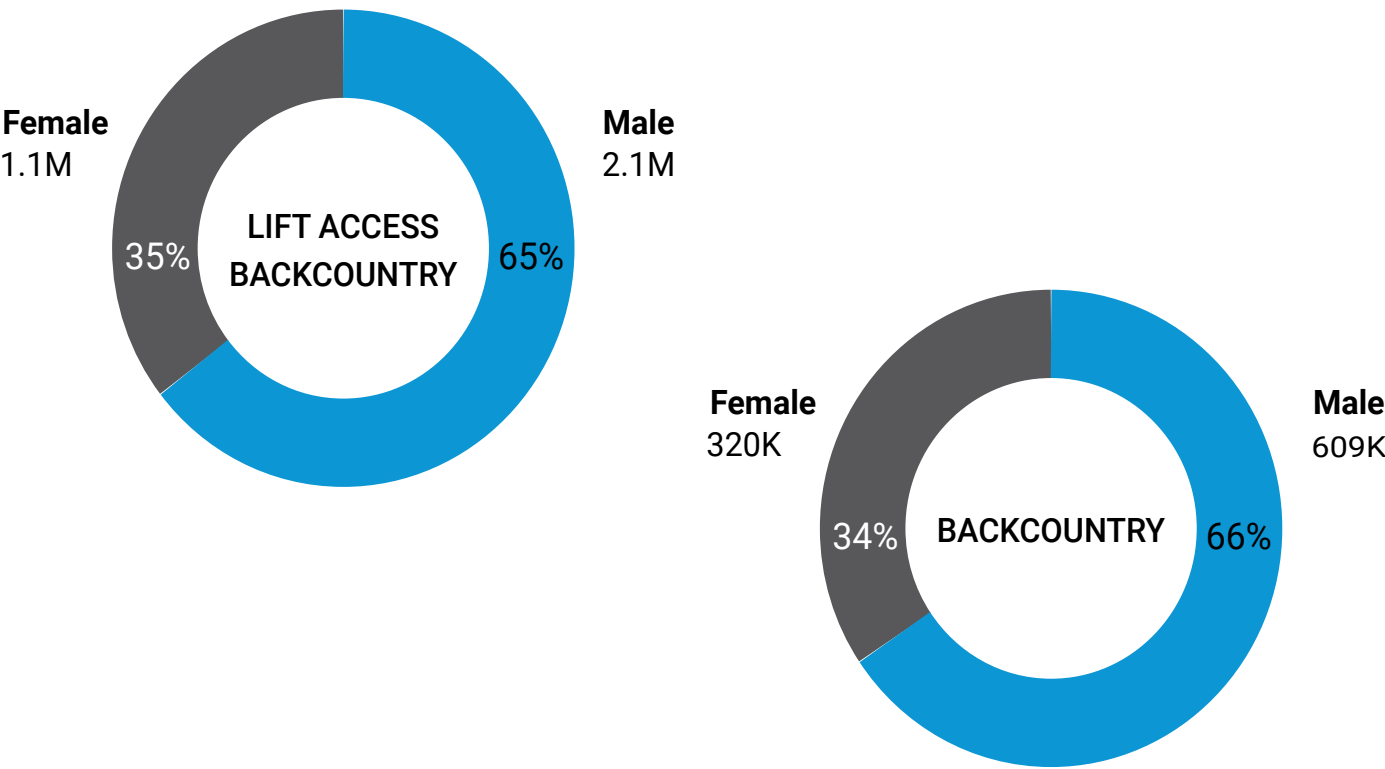
TRAIL-ACCESS BACKCOUNTRY

PACIFIC 118K	WEST NORTH CENTRAL 30K	NEW ENGLAND 127K
MOUNTAIN 204K	EAST NORTH CENTRAL 177K	MIDDLE ATLANTIC 110K
WEST SOUTH CENTRAL 59K	EAST SOUTH CENTRAL 4K	SOUTH ATLANTIC 108K

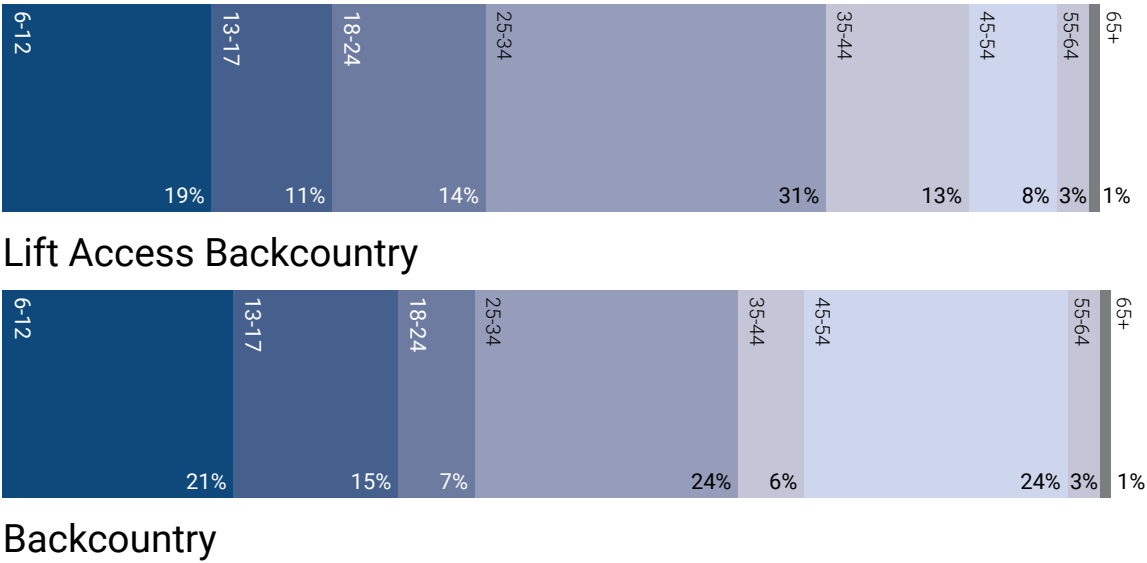
The numbers and percentages above are based on 3.2M Lift-Access and 928K trail access backcountry skiers

SIA Participation Study 2017

GENDER



AGE

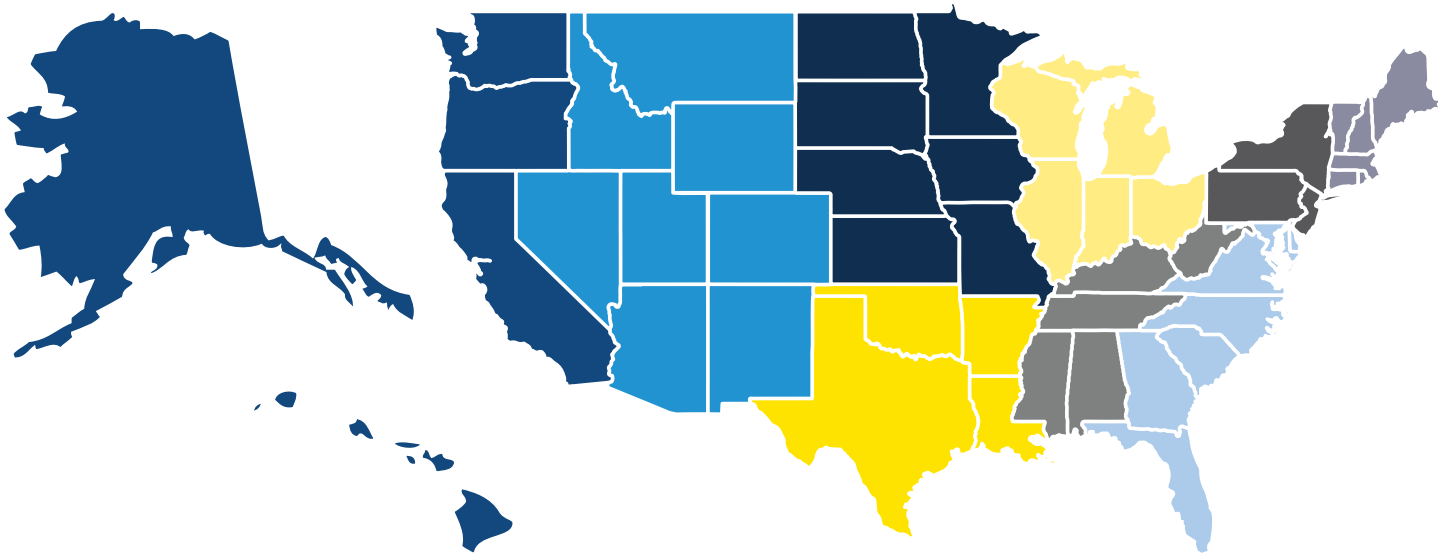


The numbers and percentages above are based on 3.2M Lift-Access and 928K trail access backcountry skiers

SIA Participation Study 2017

**SNOWBOARDER PARTICIPANTS TOTAL:
LIFT-ACCESS: 1.488M; TRAIL ACCESS: 1.1M**

BACKCOUNTRY SNOWBOARDERS BY REGION



LIFT-ACCESS BACKCOUNTRY

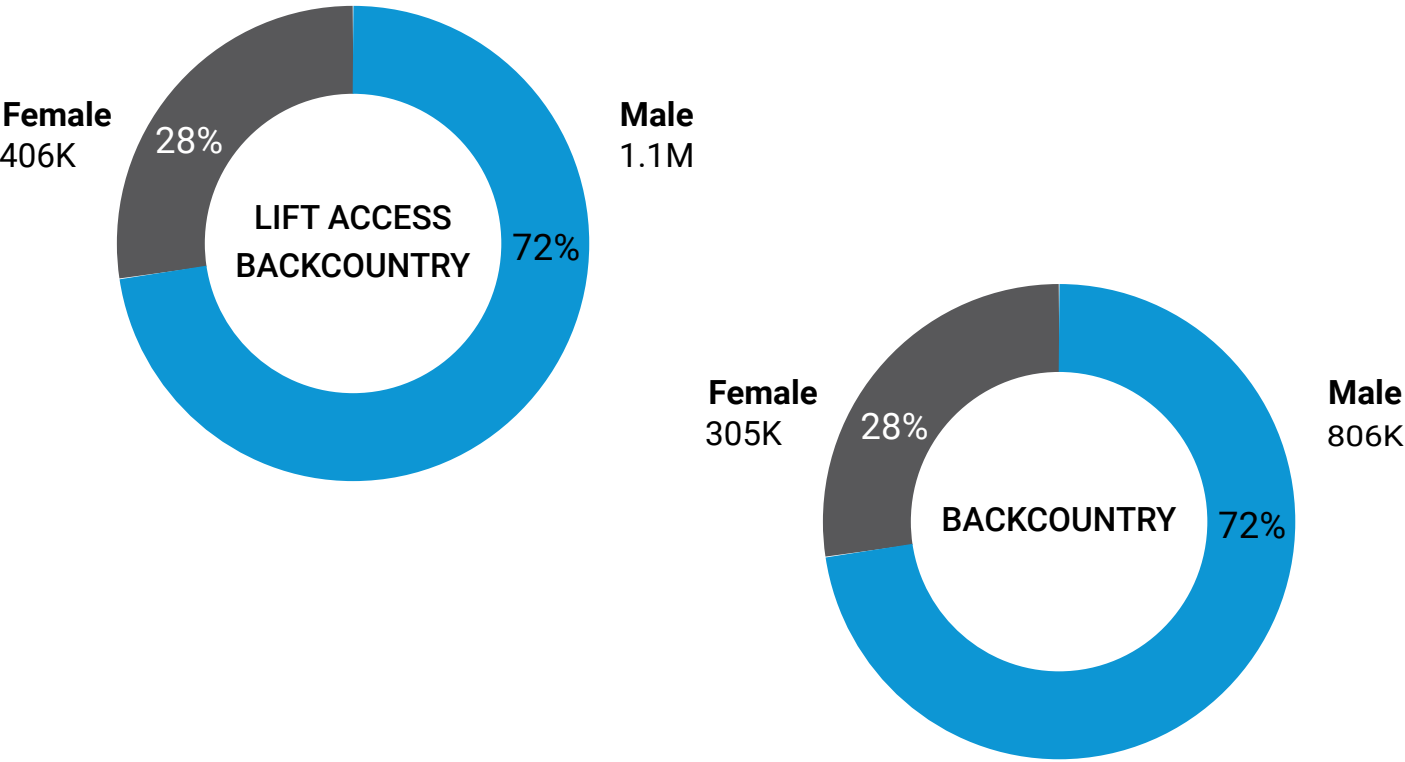
PACIFIC 307K	WEST NORTH CENTRAL 31K	NEW ENGLAND 49K
MOUNTAIN 179K	EAST NORTH CENTRAL 254K	MIDDLE ATLANTIC 282K
WEST SOUTH CENTRAL 112K	EAST SOUTH CENTRAL 44K	SOUTH ATLANTIC 232K

TRAIL-ACCESS BACKCOUNTRY

PACIFIC 177K	WEST NORTH CENTRAL 17K	NEW ENGLAND 90K
MOUNTAIN 121K	EAST NORTH CENTRAL 313K	MIDDLE ATLANTIC 253K
WEST SOUTH CENTRAL 52K	EAST SOUTH CENTRAL 6K	SOUTH ATLANTIC 83K

The numbers and percentages above are based on 1.5M Lift-Access and 1.1M trail access backcountry snowboarders

GENDER



Female

305K

28%

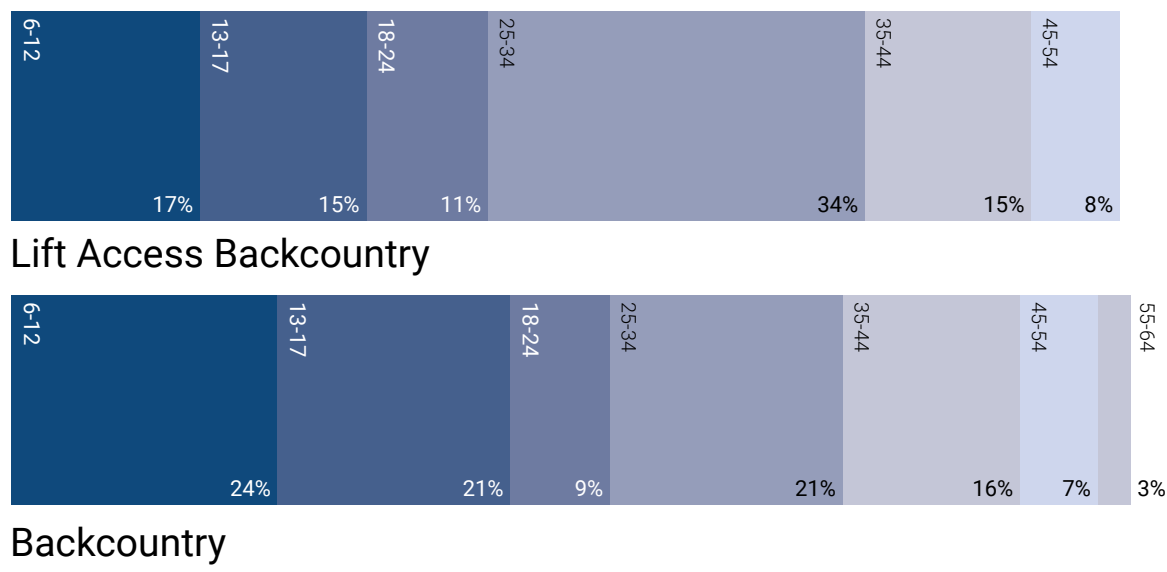
BACKCOUNTRY

72%

Male

806K

AGE



The numbers and percentages above are based on 1.5M Lift-Access and 1.1M trail access backcountry snowboarders
SIA Participation Study 2017

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METHODOLOGY

METHODOLOGY:

This Snow Sports Participant Report is derived from data produced by the Physical Activity Council (PAC), a partnership of eight of the major trade associations in US sports, fitness, and leisure industries. 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. Partners include: Snow Sports Industries of America (SIA); Outdoor Foundation (OF); National Golf Foundation (NGF); Tennis Industry Association (TIA); United States Tennis Association (USTA); International Health, Racquet and Sportsclub Association (IHRSA); Sporting Goods Manufacturers Association (SGMA); and USA Football.

During the 2016 calendar year, a total of 24,134 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 IPSOS/Synovate. A total of 11,453 individual and 12,681 household surveys were completed. The total panel is maintained to be representative of the US population for people ages six and older. Oversampling of ethnic groups took place to boost responses from typically under responding groups.

The 2016 seasonal participation survey sample size of 24,134 completed interviews 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.

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 296,251,344 people ages six and older.

RESEARCH, EDUCATION, PARTICIPATION.



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Industries
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FOR MORE INFORMATION:

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 membership:

Call 435-657-5140 or visit snowsports.org for more information.

SIA publishes a wide variety of research products for members including consumer data, wholesale Sales and Orders, Snow Sports Participation, Rental Equipment Purchasing, Compensation Reports and custom reports.

FOR SIA RESEARCH INQUIRIES:

RYAN COOMBS, RESEARCH MANAGER

435.657.5140

RCOOMBS@SNOWSPORTS.ORG