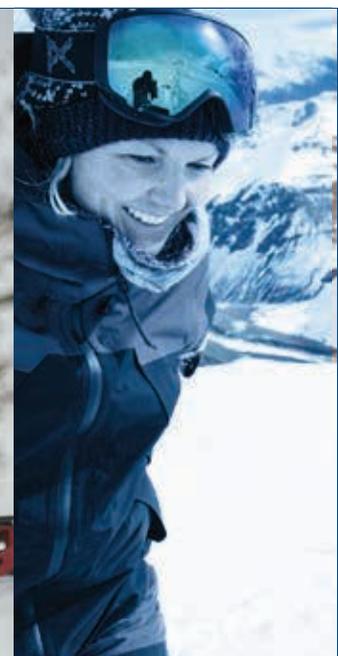
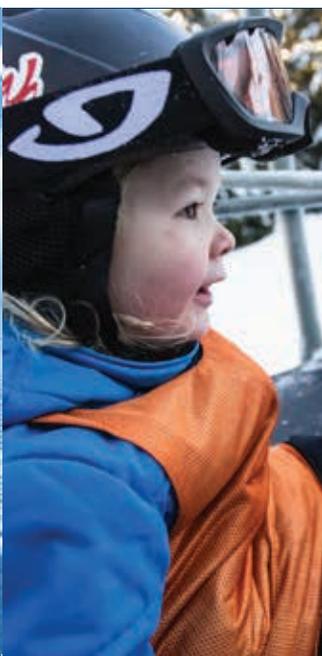




PARTICIPATION STUDY 2017-2018

SIA

Snowsports
Industries
America



INTRODUCTION

The SIA Participation Study 2018 is a comprehensive look at participants in winter sports across the 2017/2018 including: skiing, snowboarding, cross-country skiing, snowshoeing, sledding, and winter fat biking. 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 2018 is produced in collaboration with the Physical Activity Council (PAC), a partnership of eight major trade associations in US sports, fitness, and leisure activities.

Surveys were carried out with a nationwide sample of individuals and households during 2017 and the beginning of 2018. 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 siaresearch@snowsports.org

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THE TAKEAWAYS

WINTER SPORTS¹

Winter sport participation decreased **1.5%** in the 2017/2018 winter season to **24.3 Million** Americans ages 6 and older.

The **South Atlantic Region** had the **largest** number of winter sport participants at **4.38M**. The **Pacific Region** was a close **second** at **4.36M**.

The **top three (3) reasons** for **not participating in winter sports** in 2017/2018 were:

1. prefer activities closer to home
2. family commitments
3. poor weather

SKIING²

In **2017/2018**, the **Pacific Region (CA, OR, WA)** had the **largest** share of skiers that went **7 or more times** in that season (**21%**). This is a change from **2016/2017**, where the **Middle Atlantic Region** had the largest.

Vermont, Colorado, and Idaho had the **highest percentage of skiers per capita** by state in 2017/2018.

The **largest** segment of skiers (**21%**) that went **7 times or more** for the 2017/2018 season were between **25 and 34 years old**.

SNOWBOARDING

The **largest** segment of snowboarders (**20%**) that went **7 times or more** were between **25 and 34 years old**.



The Pacific Region (CA, OR, WA) had the largest share of snowboarders that went 7 or more times (25%)

CROSS-COUNTRY SKIING

More cross-country skiers went to a private cross-country center (**61%**) as compared to a public cross-country center with trails groomed by a government entity (**40%**).

ALPINE TOURING and SNOWBOARD TOURING

There were **703K** alpine touring participants and **682K** snowboard touring participants in the backcountry aged 18 and above for the 2017/2018 season.

SNOWSHOEING

47% of snowshoers also participate in day hiking. **39%** of snowshoers also participate in cross-country skiing

4 1 Winter sports defined as: skiing, snowboarding, cross-country skiing, snowshoeing, sledding, alpine touring, snowboard touring, winter fat biking

2 Skiing defined as alpine ski, telemark and freeski

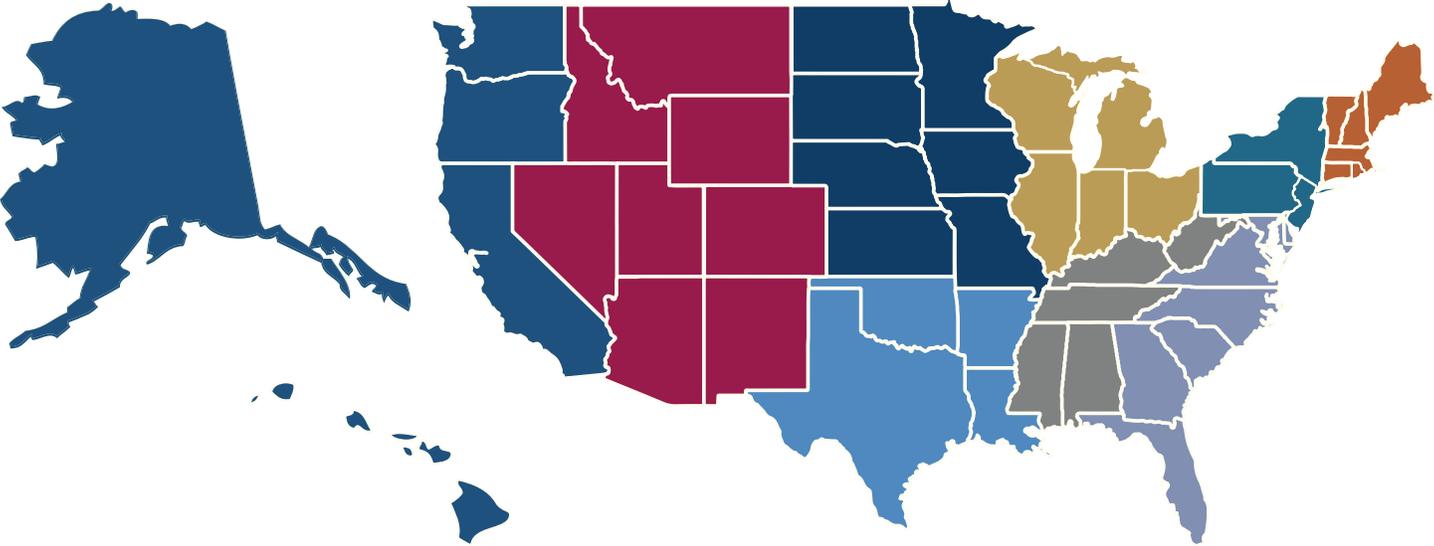


Winter Sports Participation and Demographics

TOTAL PARTICIPANTS: 24.3M

WINTER SPORTS¹ PARTICIPATION BY REGION

These numbers and percentages are based on 24.3M total winter sport participants



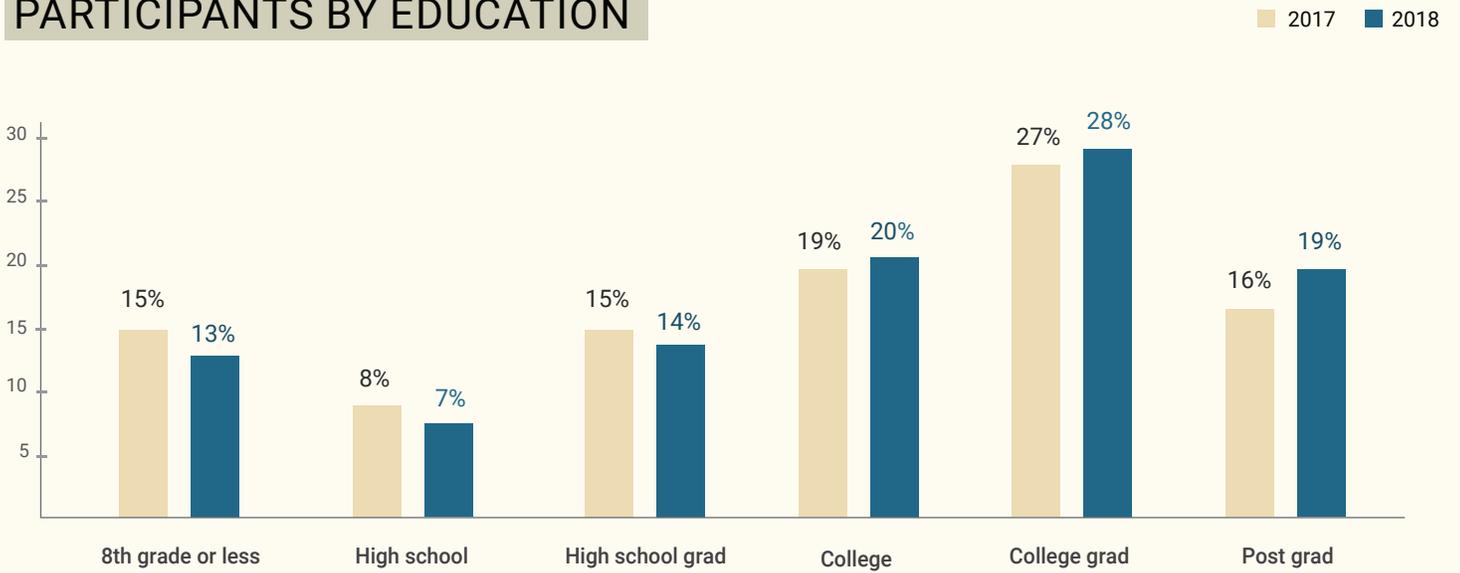
PACIFIC 4.4M	WEST NORTH CENTRAL 1.6M	NEW ENGLAND 1.5M
MOUNTAIN 2.1M	EAST NORTH CENTRAL 3.6M	MIDDLE ATLANTIC 3.4M
WEST SOUTH CENTRAL 2.3M	EAST SOUTH CENTRAL 1.2M	SOUTH ATLANTIC 4.4M



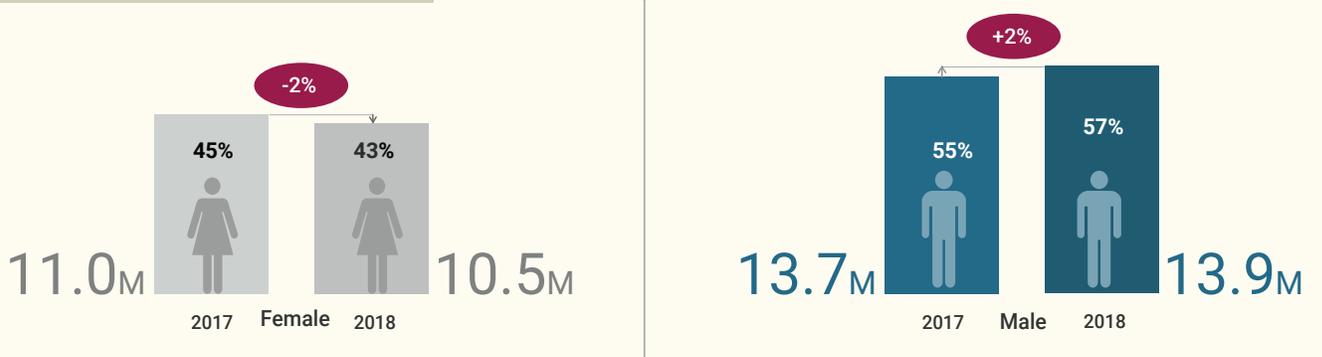
24.3 Million Americans ages 6 and older participated in winter sports in the **2017/2018** winter season. This is down 1.5% from **24.7 Million** recorded in the 2016/2017 winter season. Overall, winter sport participants are skewed slightly male, with higher household incomes, and have higher levels of education.

6 1 Winter sports defined as: skiing, snowboarding, cross-country skiing, snowshoeing, sledding, alpine touring, snowboard touring, winter fat biking

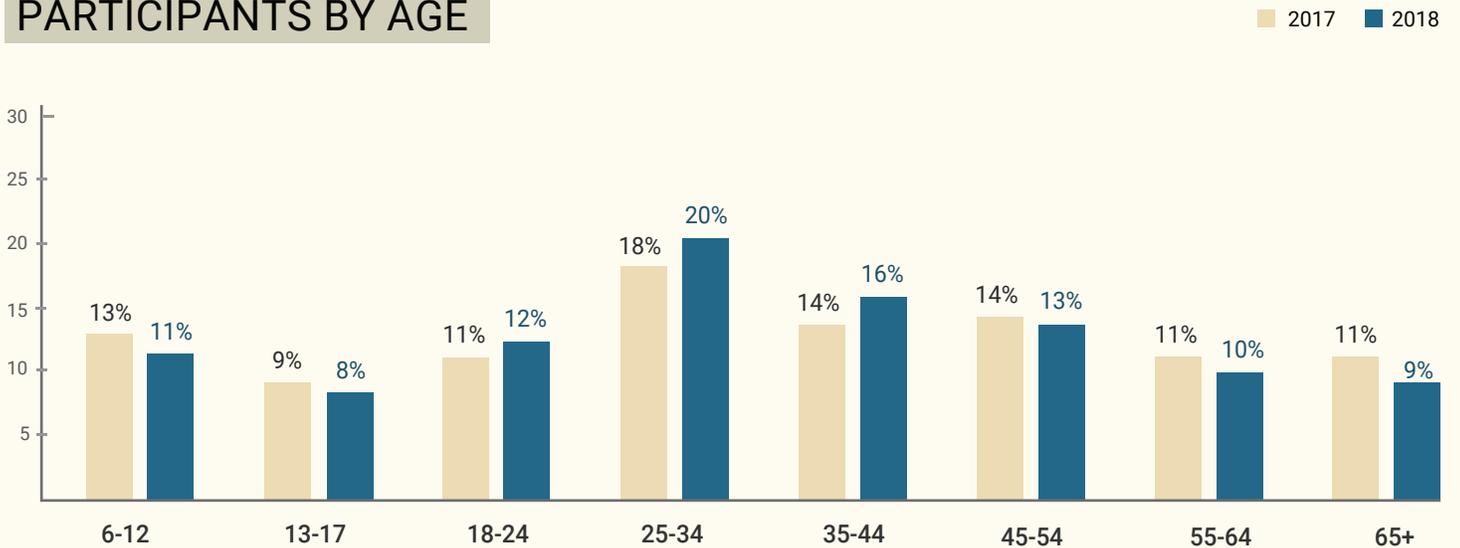
PARTICIPANTS BY EDUCATION



PARTICIPANTS BY GENDER

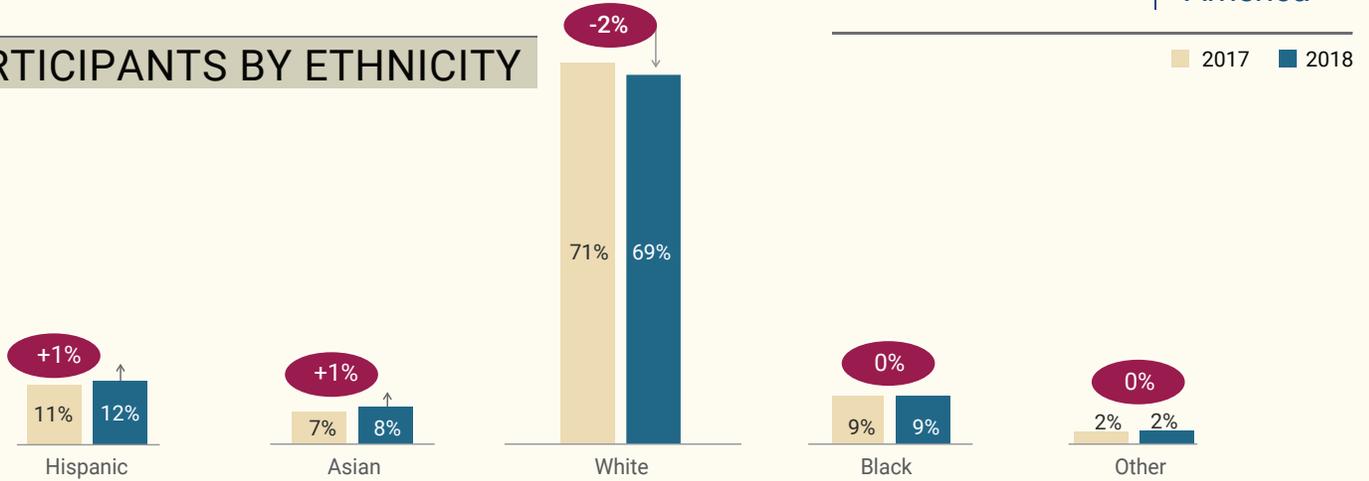


PARTICIPANTS BY AGE

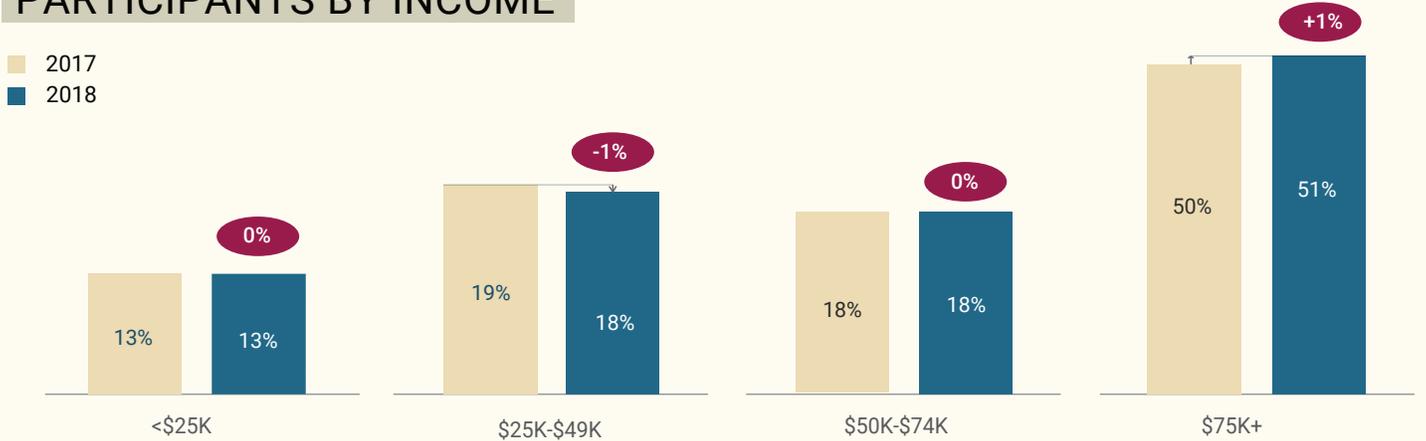


These numbers and percentages are based on 24.3M total winter sport participants
SIA Participation Study 2018

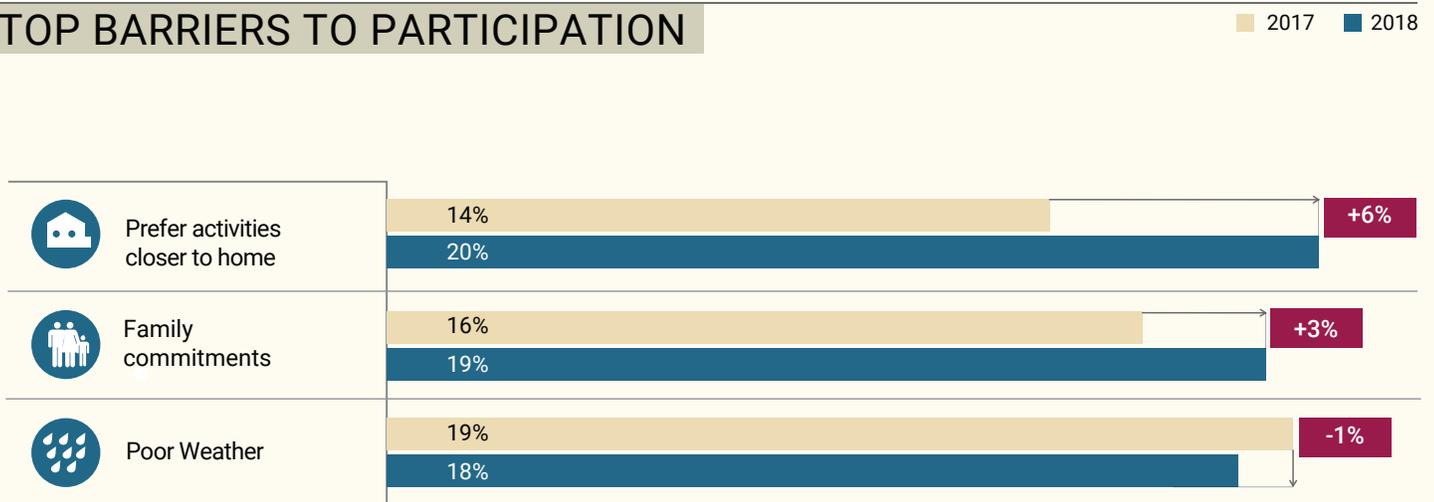
PARTICIPANTS BY ETHNICITY



PARTICIPANTS BY INCOME



TOP BARRIERS TO PARTICIPATION



These numbers and percentages are based on 24.3M total winter sport participants
SIA Participation Study 2018

PARTICIPATION OVER TIME

	SKI		SNOWBOARD		CROSS-COUNTRY SKIING		SNOWSHOE	
		Growth %		Growth %		Growth %		Growth %
2009/2010	12.6M	3%	7.4M	4%	4.2M	8%	3.4M	-30%
2010/2011	12.8M	1%	8.2M	10%	4.5M	9%	3.8M	11%
2011/2012	13.8M	8%	7.6M	-8%	4.3M	-5%	4.1M	8%
2012/2013	14.5M	5%	7.4M	-3%	4.5M ¹	5%	4.0M	-2%
2013/2014	14.9M	2%	7.4M	1%	4.3M	-5%	3.6M	-11%
2014/2015	15.3M	3%	7.7M	4%	4.1M	-3%	3.9M	8%
2015/2016	15.6M	2%	7.6M	-1%	4.6M	12%	3.5M	-9%
2016/2017	15.3M	-2%	7.6M	-1%	5.1M	9%	3.7M	5%
2017/2018	14.7M	-4%	7.1M	-7%	5.1M	0%	3.5M	-5%
% of US Pop. 6 and older		4.9%		2.4%		1.7%		1.2%

AVERAGE NUMBER OF DAYS BY AGE & ACTIVITY

		Total Avg	6-12	13-17	18-24	25-34	35-44	45-54	55+
2017-2018	 SKI	7.4	9.1	3.5	5.6	7.9	5.8	4.4	11.7
	 SNOWBOARD	7.7	7.3	9.0	7.6	5.6	6.6	9.8	8.8
	 CROSS-COUNTRY SKIING	7.7	7.4	12.2	9.7	6.4	4.9	9.6	7.7
	 SNOWSHOE	6.8	7.7	5.7	6.8	8.2	4.0	4.8	6.5
	 ALPINE TOURING	NA	NA	NA	2.7	8.1	7.1	2.0	2.6
	 SNOWBOARD TOURING	NA	NA	NA	5.1	3.6	3.6	4.3	2.7
2016-2017	 ALPINE SKI	7.9	5.8	5.7	7.4	8.0	7.7	6.8	9.0
	 TELEMARK	5.8	3.6	6.4	5.2	4.9	3.5	11.9	5.9
	 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
	 CROSS-COUNTRY SKIING	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

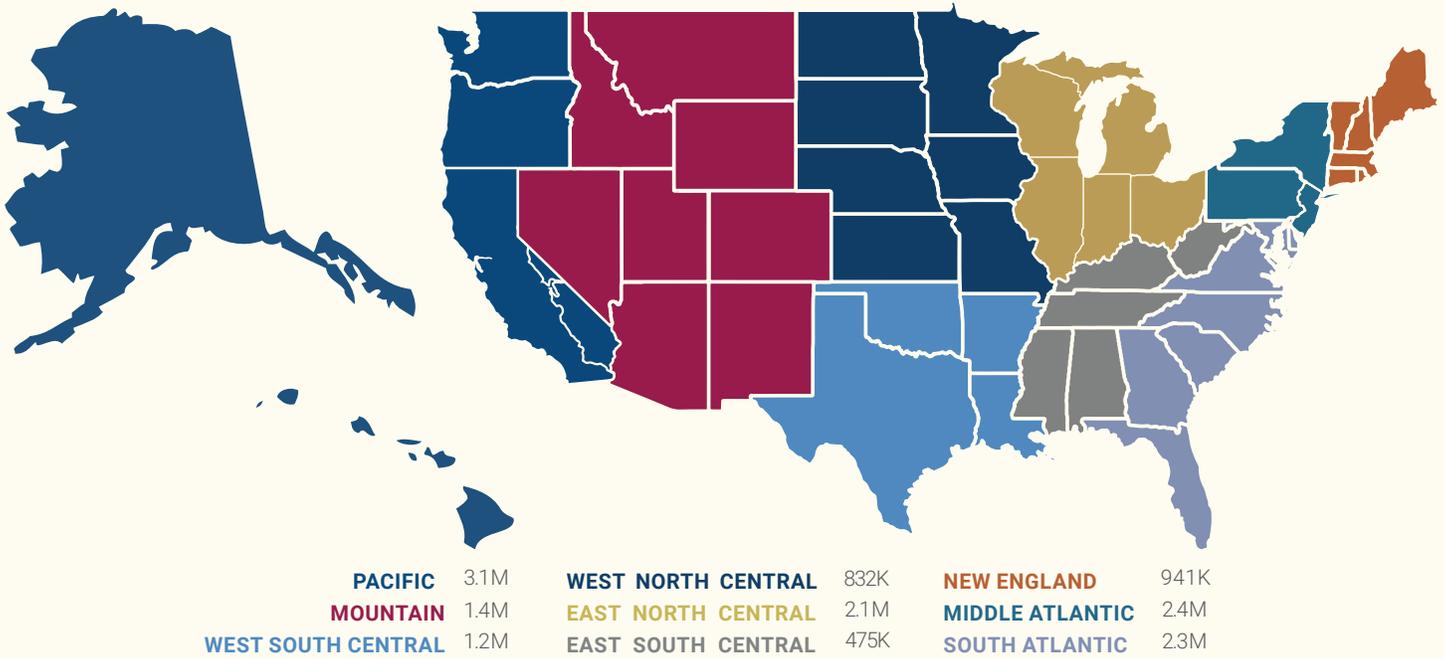
*These numbers and percentages are based on 24.3M total winter sport participants
SIA Participation Study 2018*



Ski Participation and Demographics

SKIING¹ BY REGION

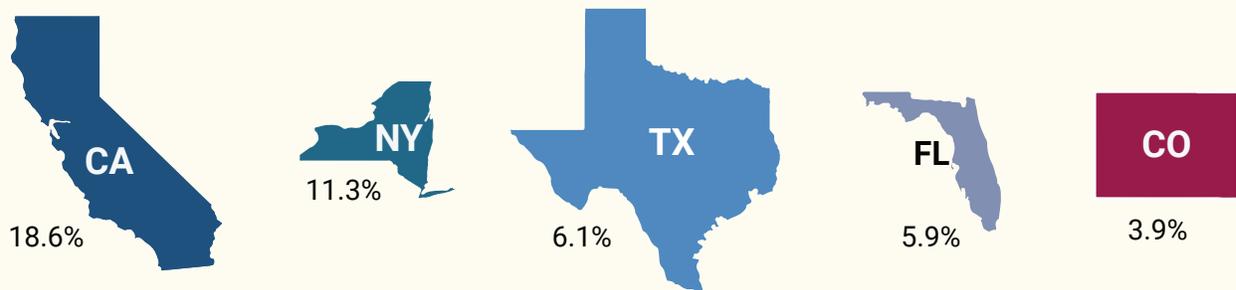
TOTAL PARTICIPANTS: 14.7M



The Pacific region had the largest share of skiers that went 7 or more times during the 2017/2018 season at 21.4%.

STATES WITH GREATEST SHARE OF TOTAL SKI POPULATION

These states contributed the greatest proportion of skiers to the total 14.7M ski participants in the US.



STATES WITH GREATEST PERCENTAGE OF SKIERS PER CAPITA

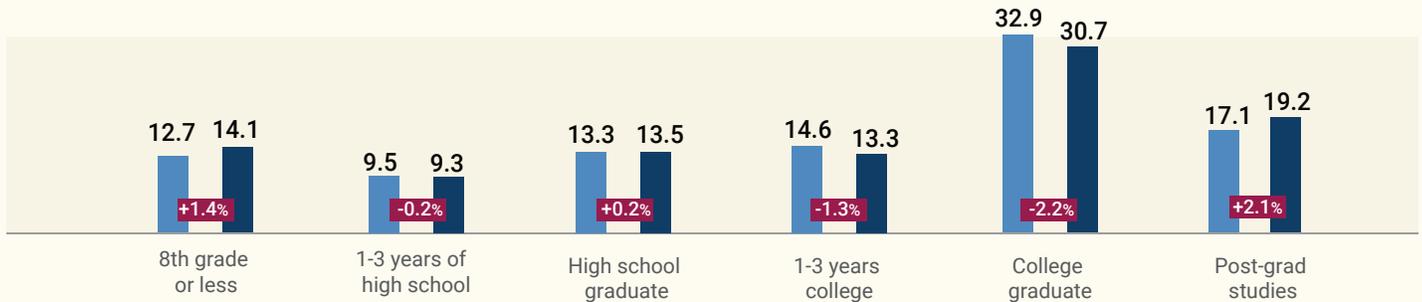
These states had the greatest proportion of skiers relative to their population.



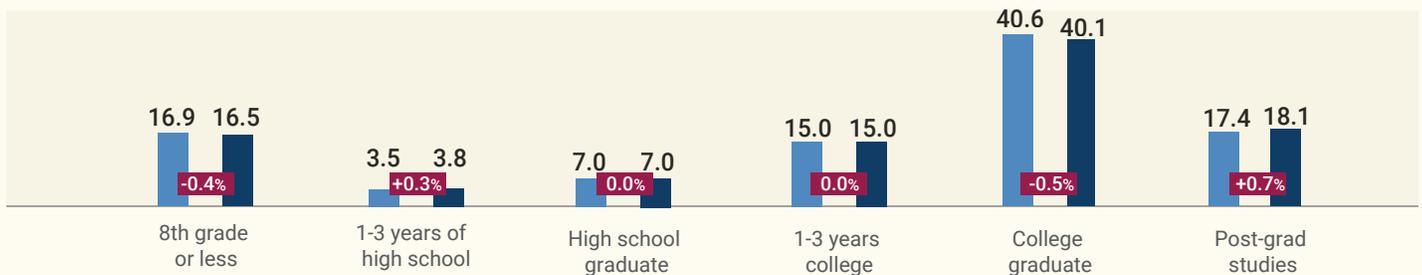
PARTICIPANTS BY EDUCATION & FREQUENCY

■ 2016-2017 ■ 2017-2018

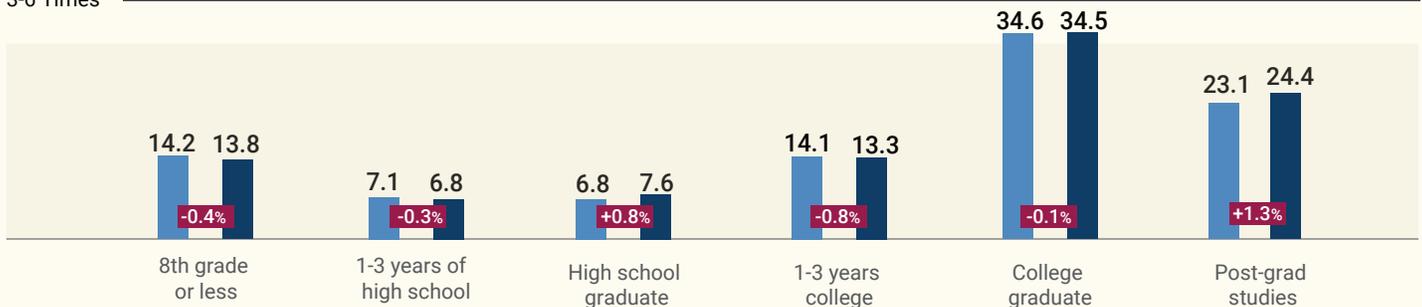
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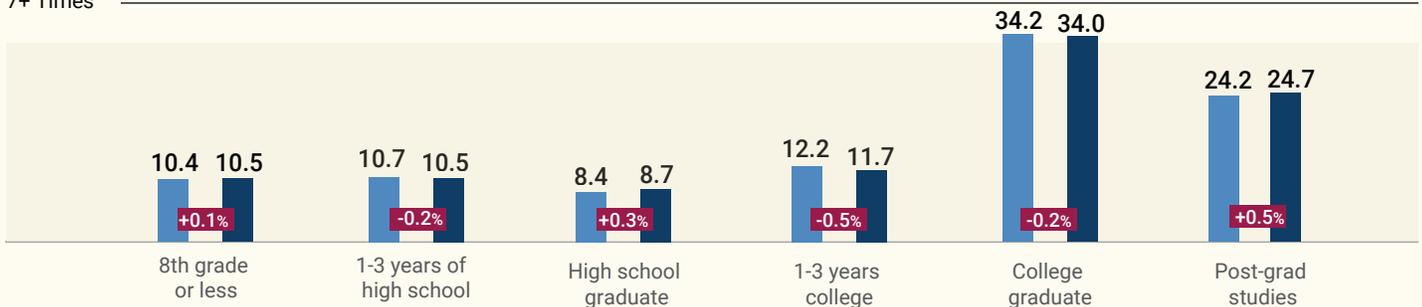
2 Times



3-6 Times



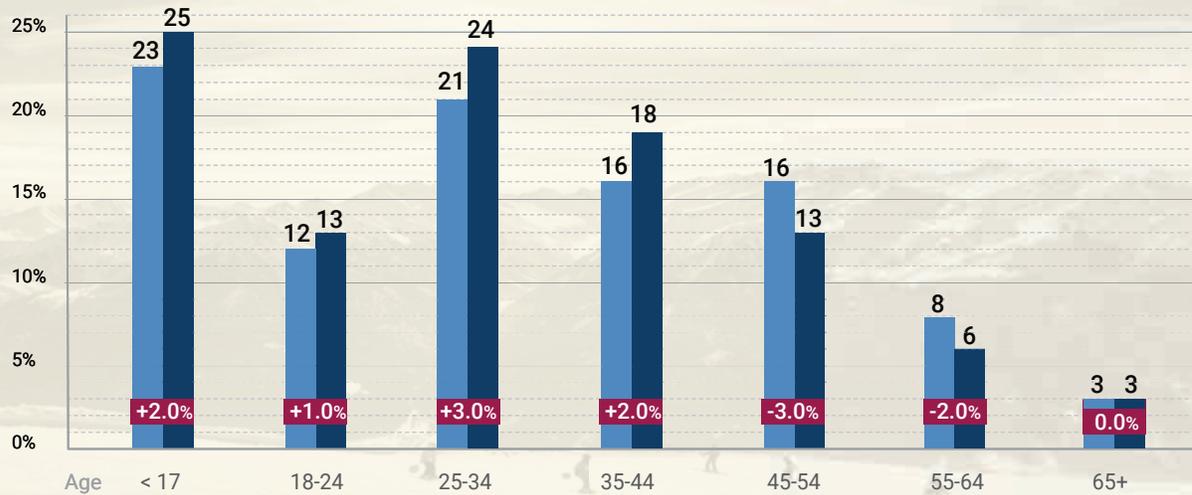
7+ Times



The numbers and percentages above are based on 14.7M total ski participants
SIA Participation Study 2018

PARTICIPANTS BY AGE

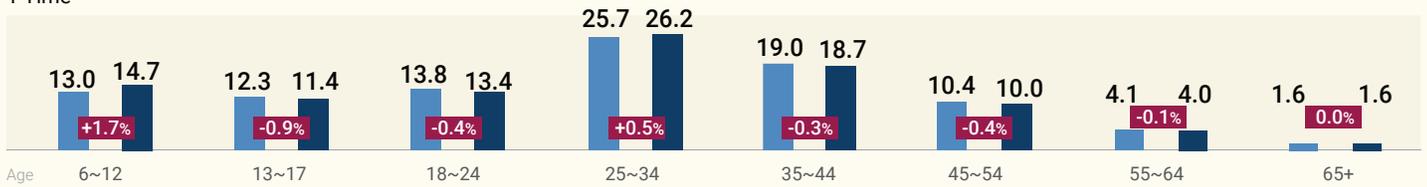
2016-2017 2017-2018



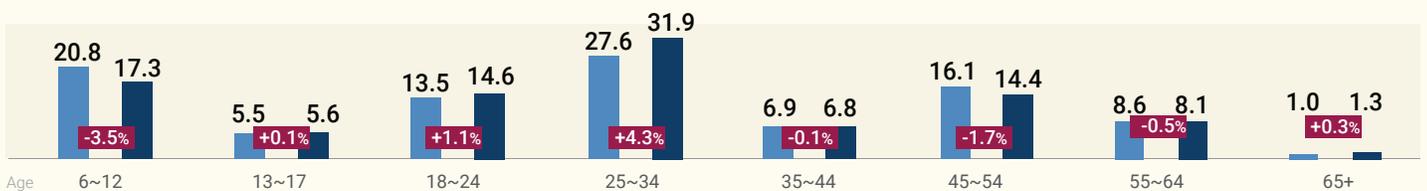
PARTICIPANTS BY AGE & FREQUENCY

2016-2017 2017-2018

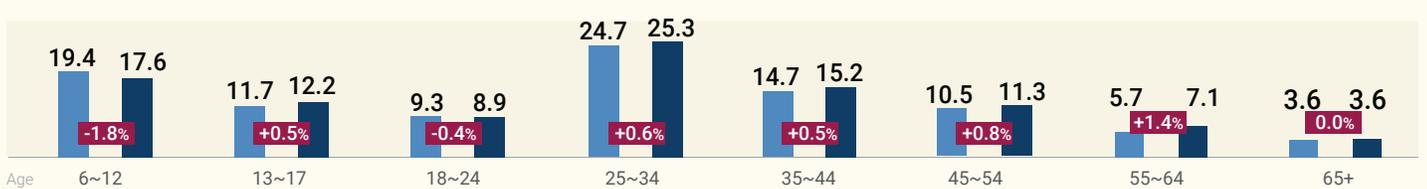
1 Time



2 Times



3-6 Times



7+ Times



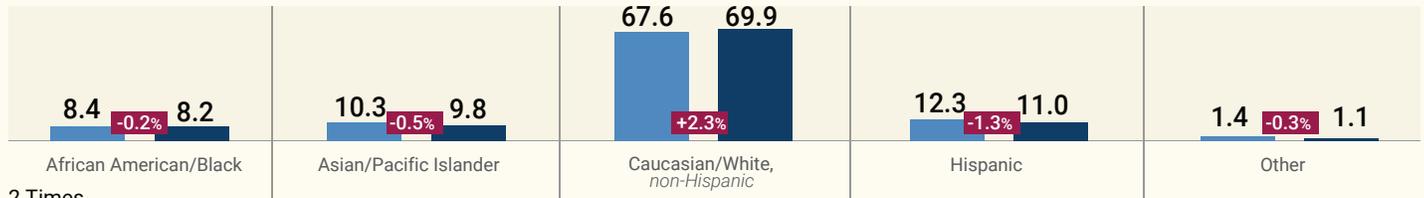
The numbers and percentages above are based on 14.7M total ski participants

SIA Participation Study 2018

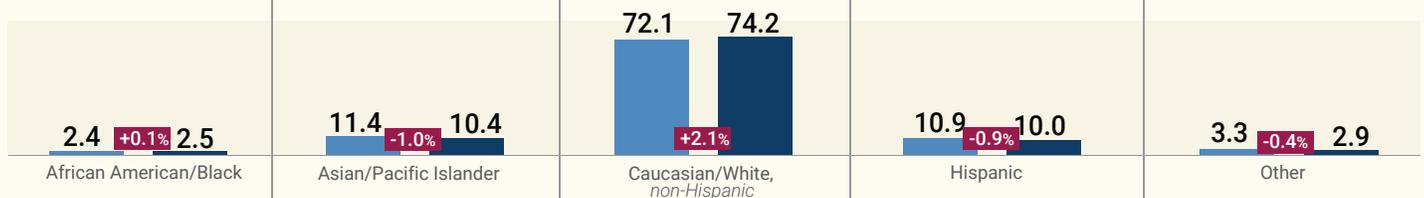
PARTICIPANTS BY ETHNICITY & FREQUENCY

■ 2016-2017 ■ 2017-2018

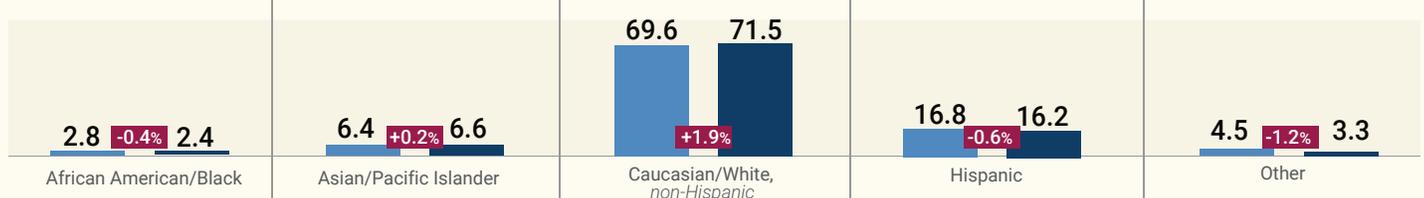
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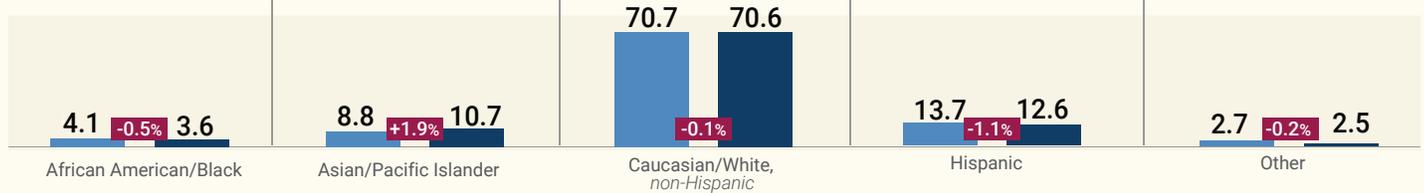
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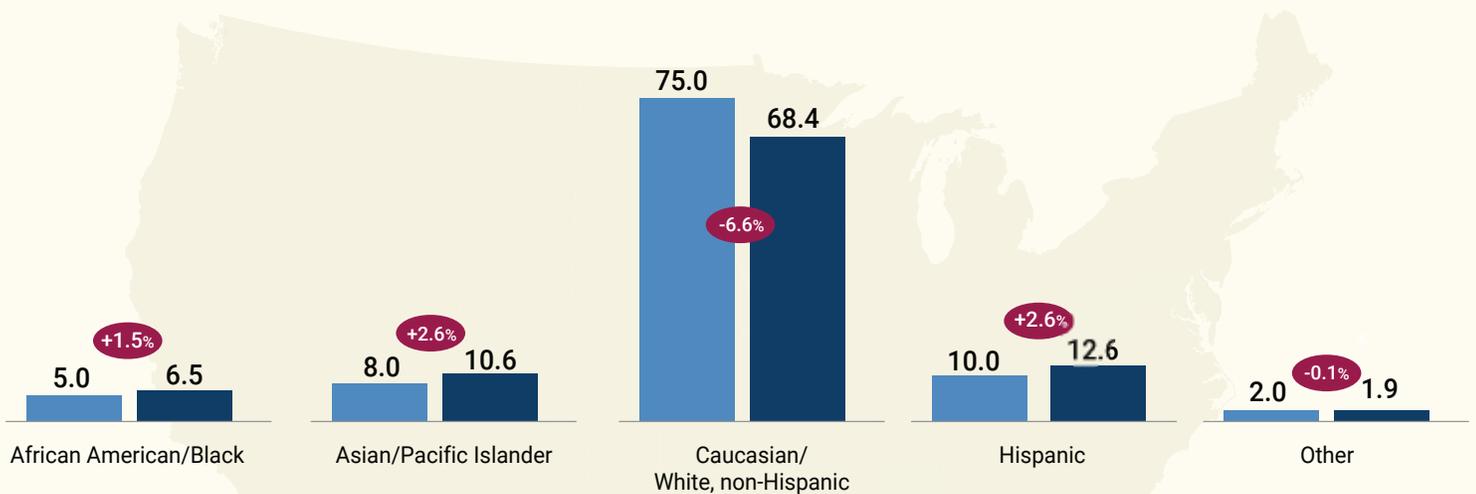
3-6 Times



7+ Times



PARTICIPANTS BY ETHNICITY



The numbers and percentages above are based on 14.7M total ski participants

SIA Participation Study 2018

PARTICIPANTS BY INCOME & FREQUENCY

■ 2016-2017 ■ 2017-2018



GAIN/LOSS OF ACTIVE PARTICIPANTS¹

■ 2016-2017 ■ 2017-2018

In 2016/2017 there were 15.3M participants. In 2017/2018, 9.4M participants were new/returned and 10.0M participants took the season off. The total for 2017/2018 was 14.7M participants.

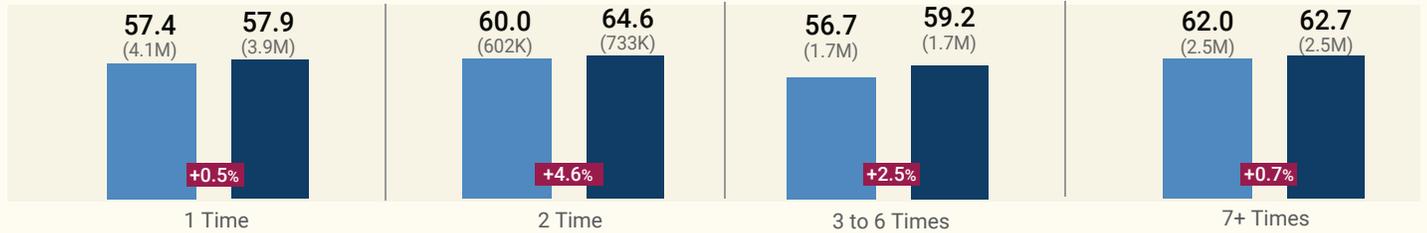


The numbers and percentages above are based on 14.7M total ski participants

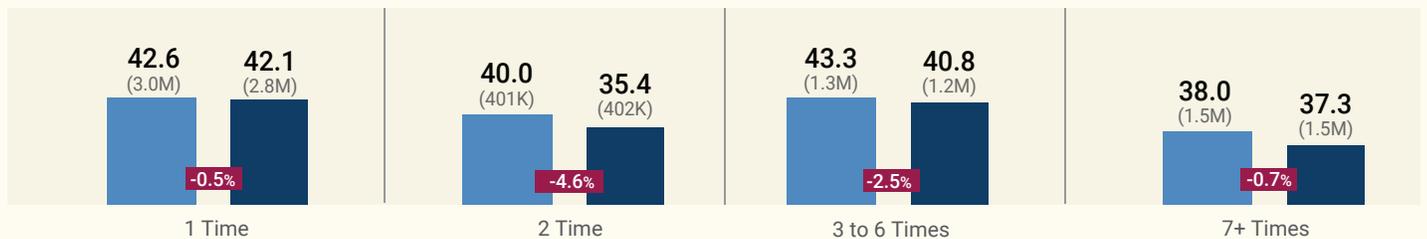
PARTICIPANTS BY GENDER & FREQUENCY

■ 2016-2017 ■ 2017-2018

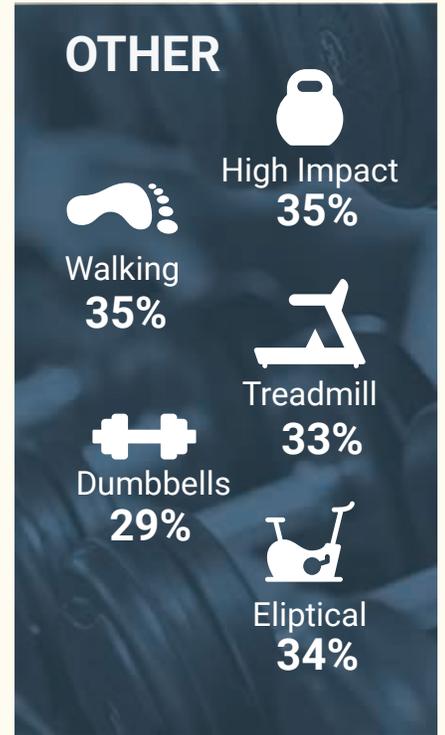
Male



Female



CROSSOVER ACTIVITIES



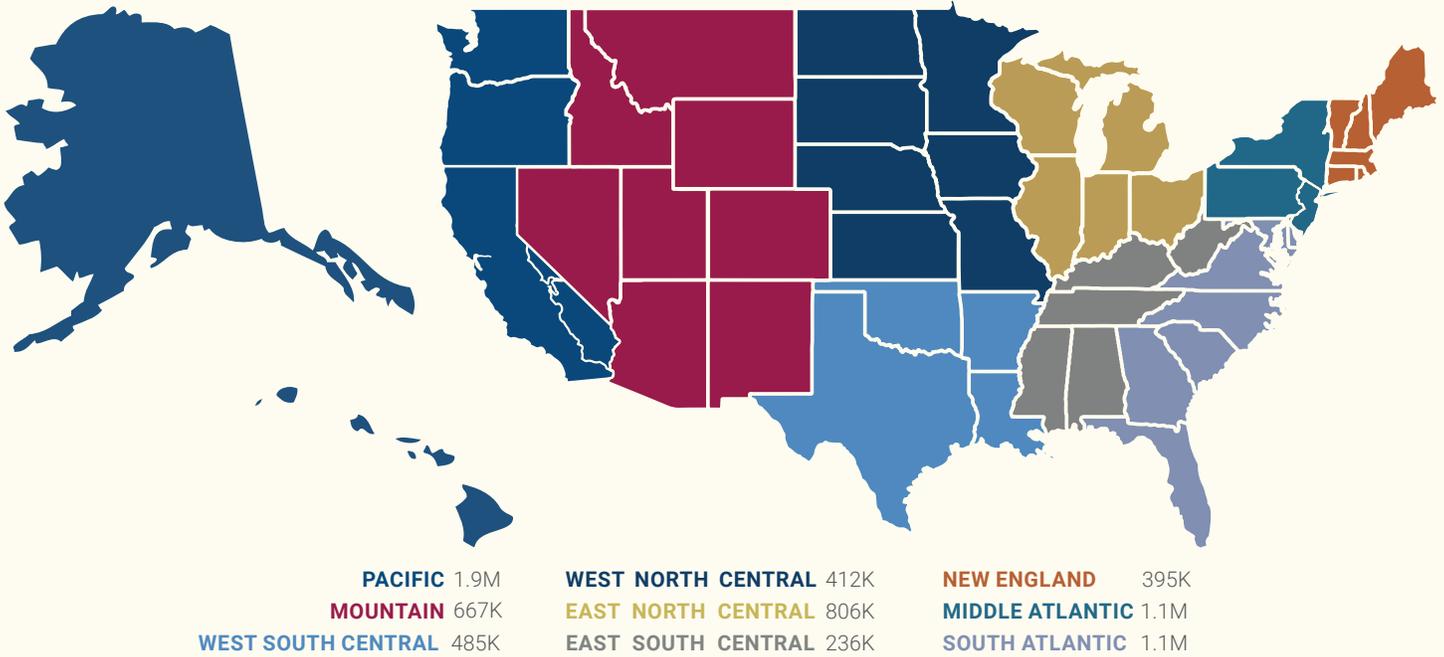
The numbers and percentages above are based on 14.7M total ski participants

SIA Participation Study 2018

Snowboard Participation and Demographics

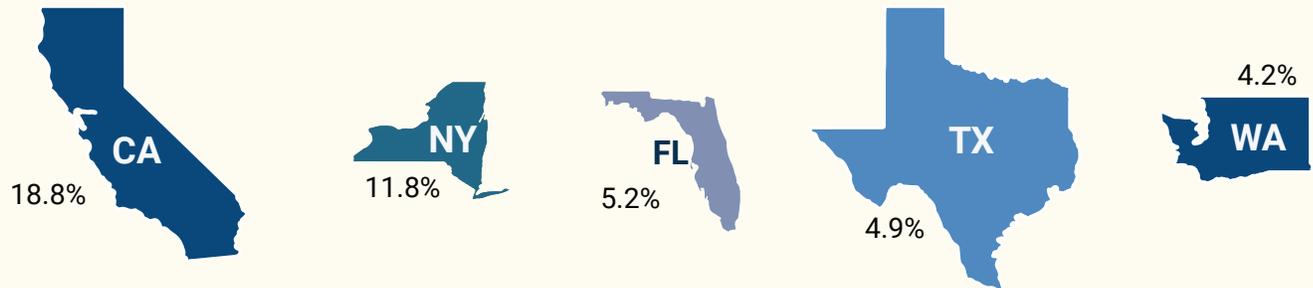
SNOWBOARDING BY REGION

TOTAL PARTICIPANTS: 7.1M



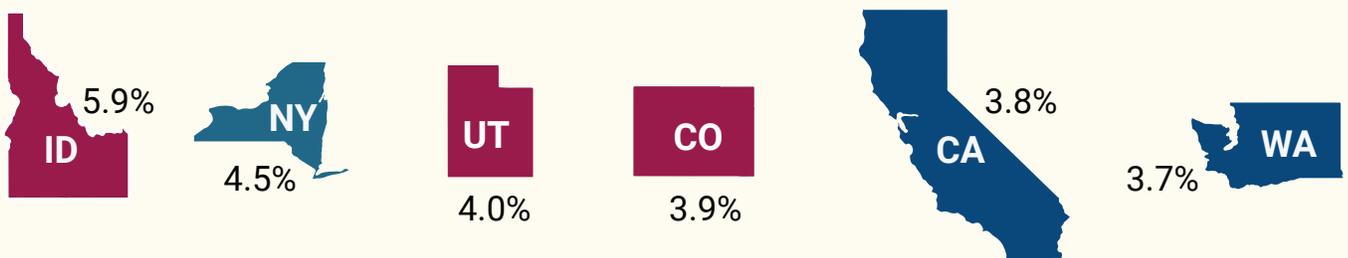
STATES WITH GREATEST SHARE OF TOTAL SNOWBOARD POPULATION

These states contributed the greatest proportion of snowboarders to the total 7.1M snowboard participants in the US.



STATES WITH GREATEST PERCENTAGE OF SNOWBOARDERS PER CAPITA

These states had the greatest proportion of snowboarders relative to their population.



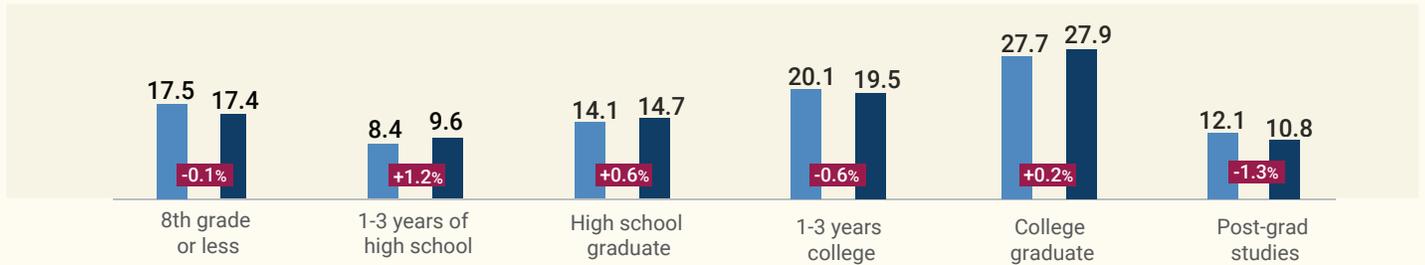
The numbers and percentages above are based on 7.1M total snowboard participants

SIA Participation Study 2018

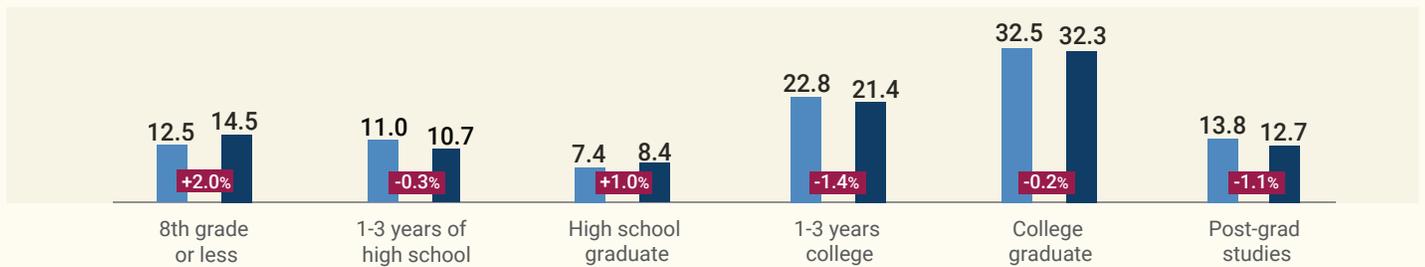
PARTICIPANTS BY EDUCATION & FREQUENCY

■ 2016-2017 ■ 2017-2018

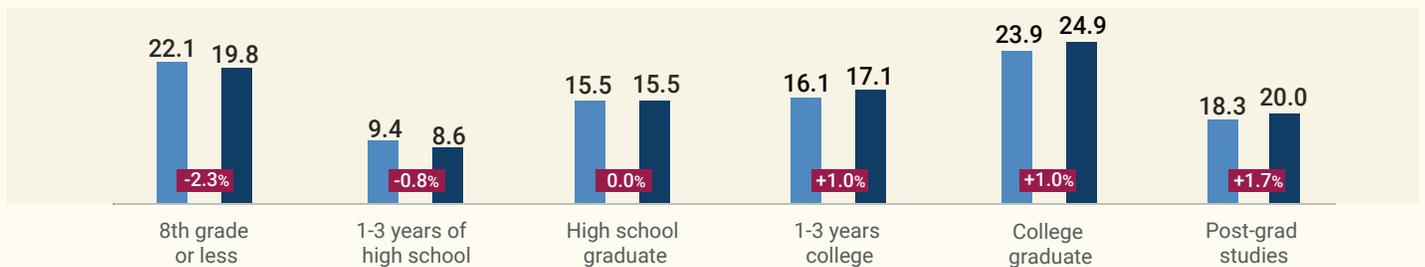
1 Time



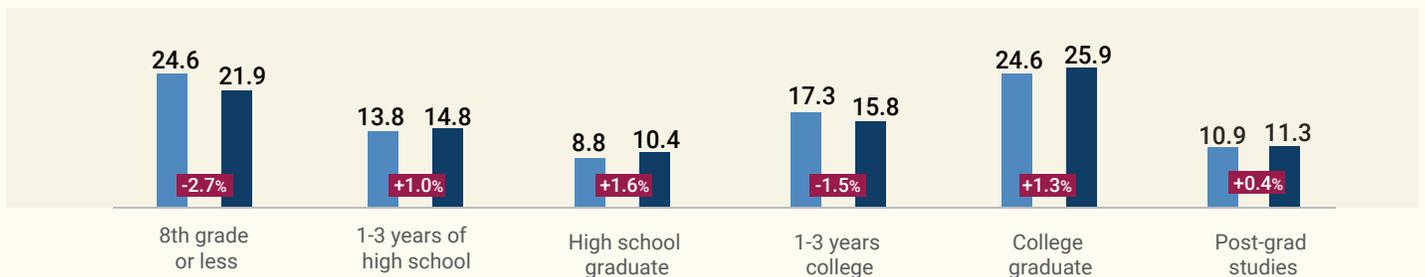
2 Times



3-6 Times



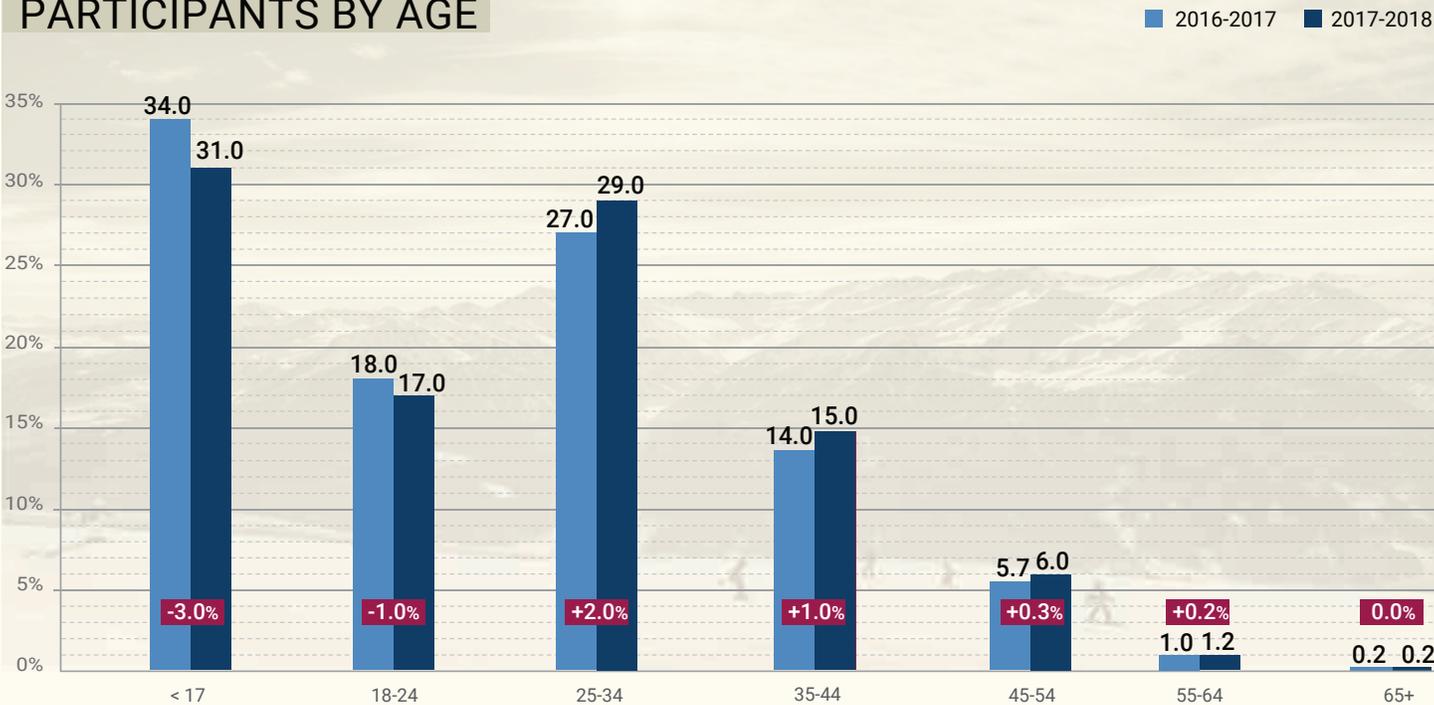
7+ Times



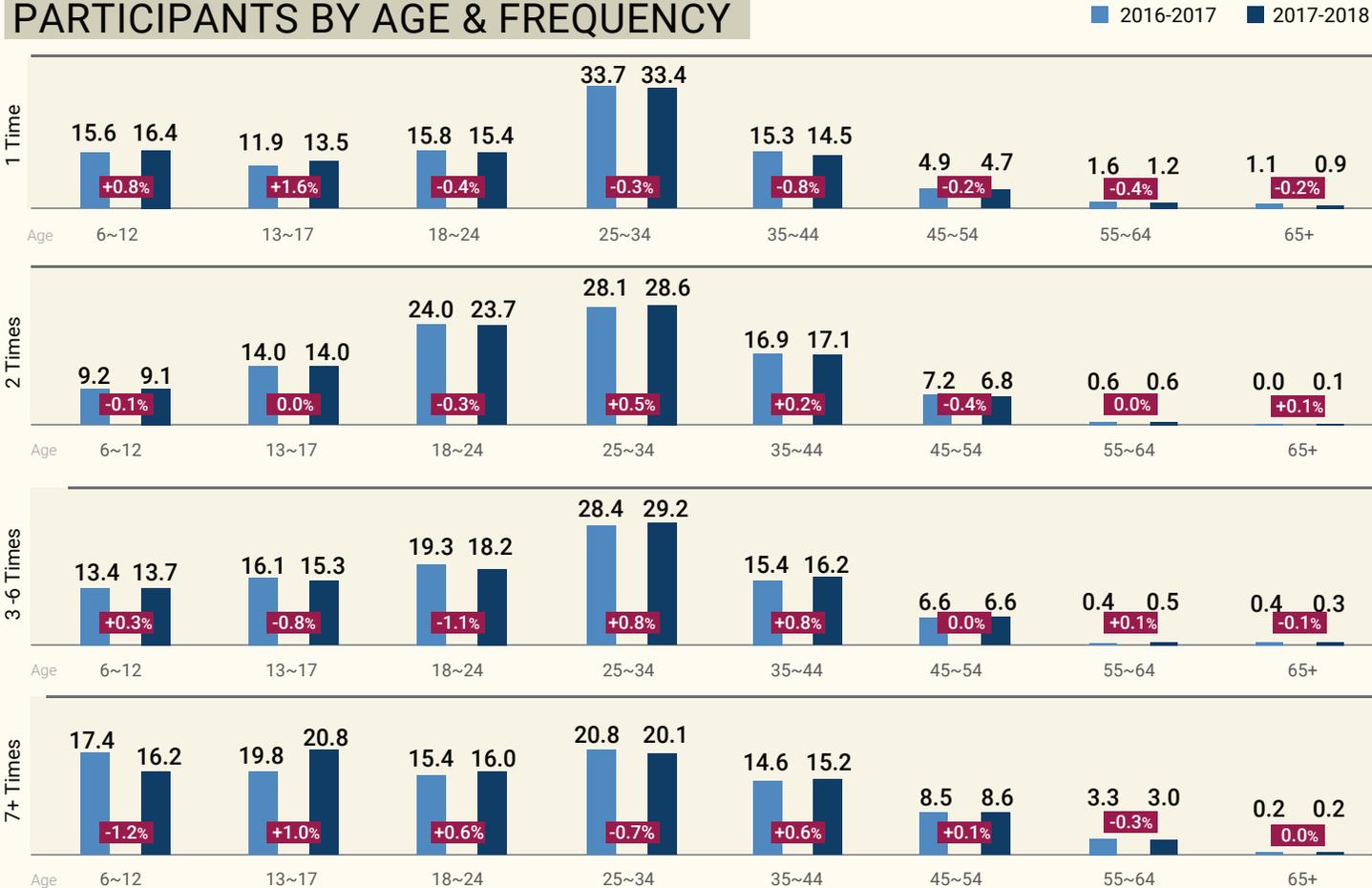
The numbers and percentages above are based on 7.1M total snowboard participants

SIA Participation Study 2018

PARTICIPANTS BY AGE



PARTICIPANTS BY AGE & FREQUENCY



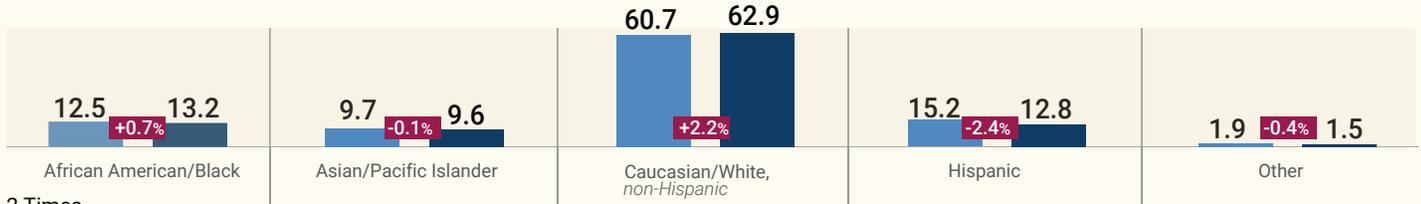
The numbers and percentages above are based on 7.1M total snowboard participants

SIA Participation Study 2018

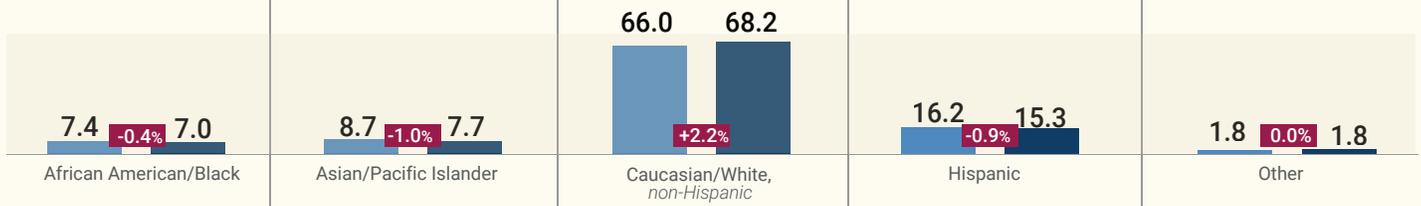
PARTICIPANTS BY ETHNICITY & FREQUENCY

■ 2016-2017 ■ 2017-2018

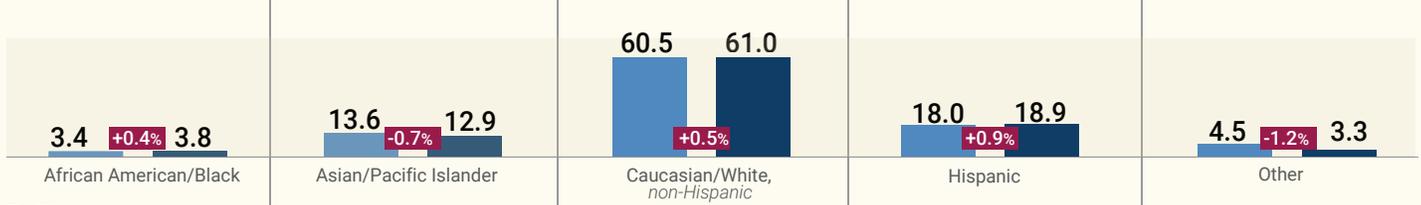
1 Time



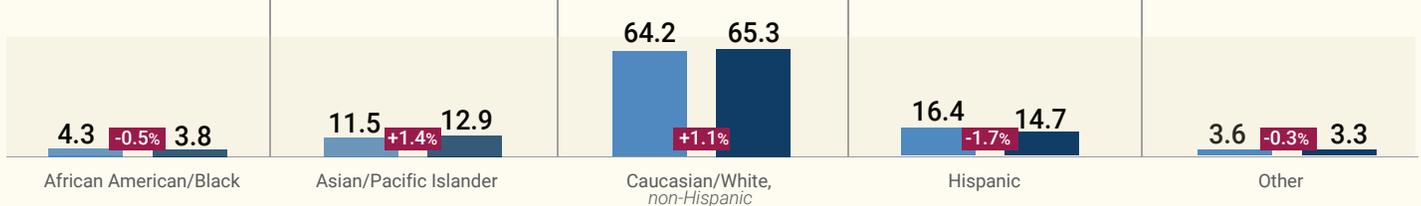
2 Times



3-6 Times

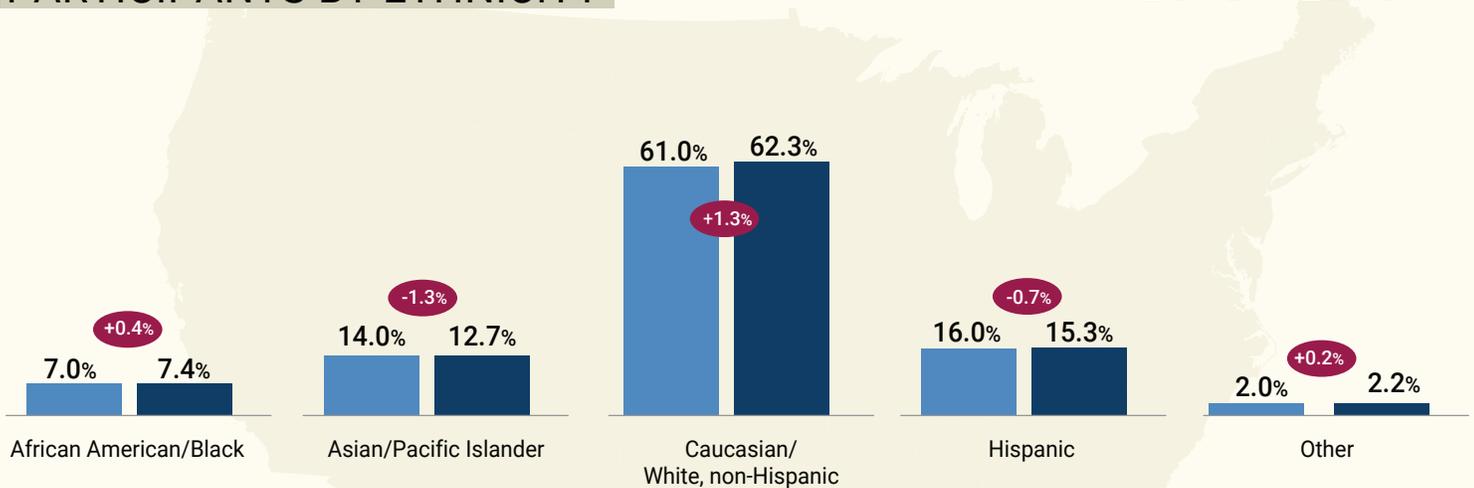


7+ Times



PARTICIPANTS BY ETHNICITY

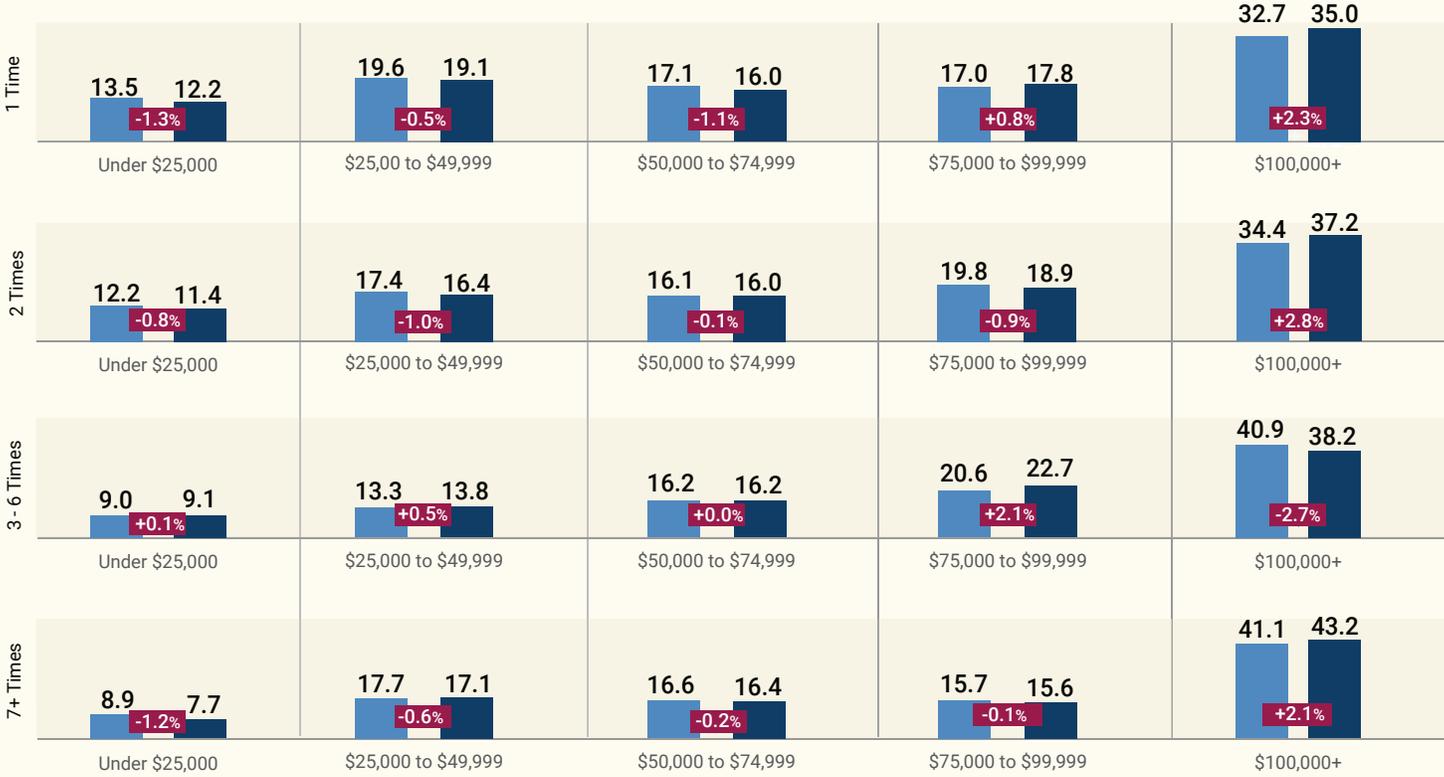
■ 2016-2017 ■ 2017-2018



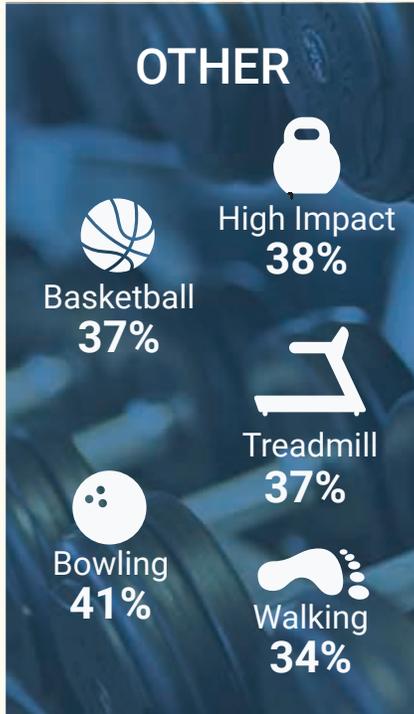
The numbers and percentages above are based on 7.1M total snowboard participants
SIA Participation Study 2018

PARTICIPANTS BY INCOME & FREQUENCY

■ 2016-2017 ■ 2017-2018



CROSSOVER ACTIVITIES



The numbers and percentages above are based on 7.1M total snowboard participants
SIA Participation Study 2018

GAIN/LOSS OF ACTIVE PARTICIPANTS¹

■ 2016-2017 ■ 2017-2018

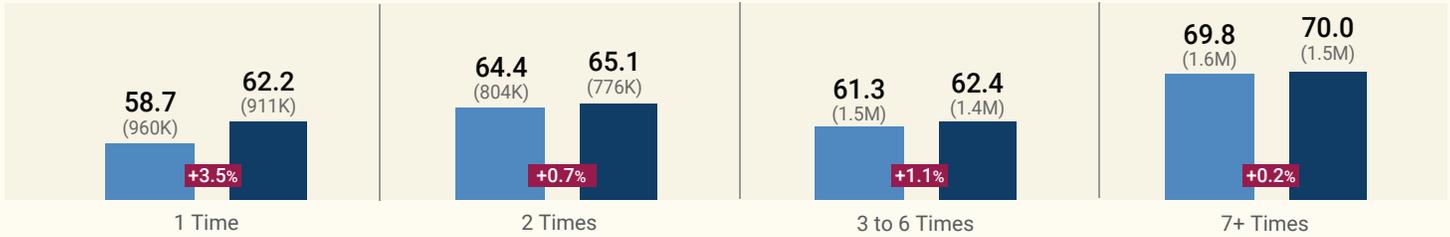
In 2016/2017 there were 7.6M participants. In 2017/2018, 4.4M participants were new/returned and 4.9M participants took the season off. The total for 2017/2018 was 7.1M participants.



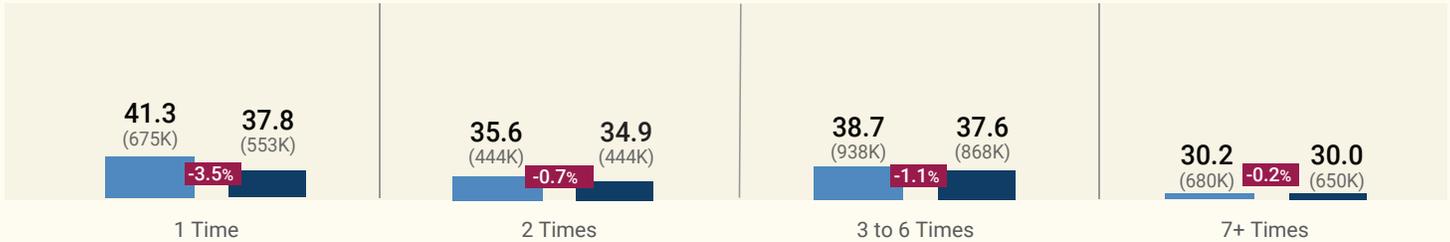
PARTICIPANTS BY GENDER & FREQUENCY

■ 2016-2017 ■ 2017-2018

Male



Female



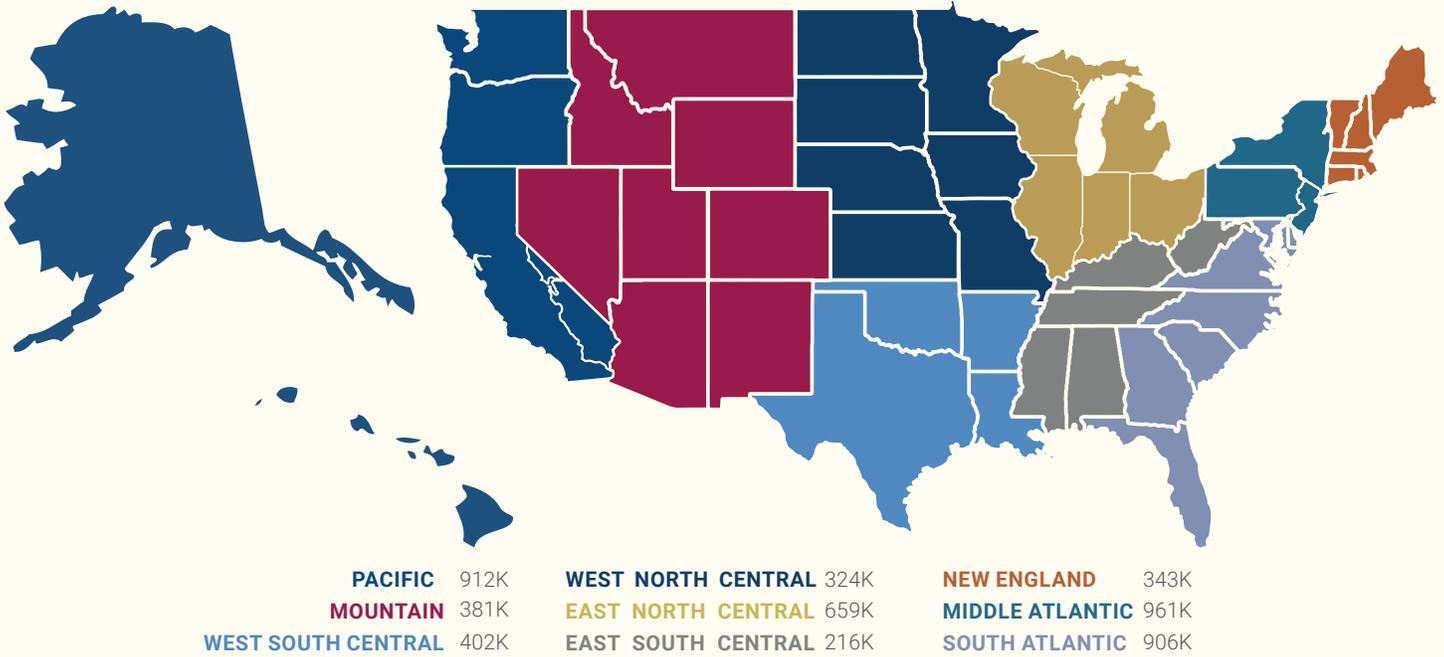
The numbers and percentages above are based on 7.1M total snowboard participants



Cross-country Skiing Participation and Demographics

CROSS-COUNTRY SKIING BY REGION

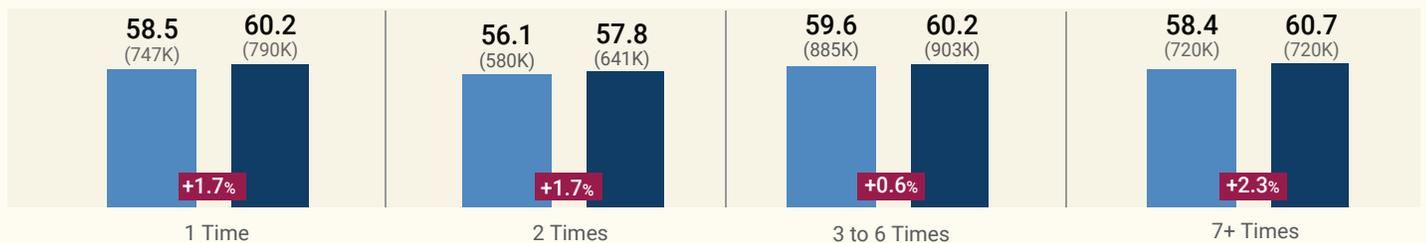
TOTAL PARTICIPANTS: 5.1M



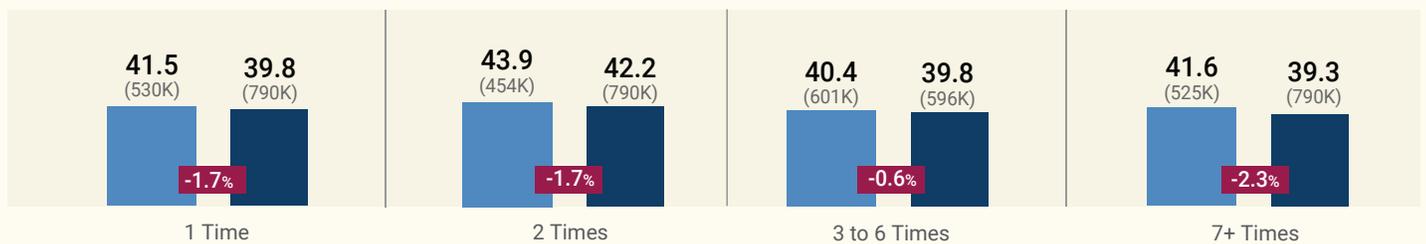
PARTICIPATION BY GENDER & FREQUENCY

■ 2016-2017 ■ 2017-2018

Male



Female



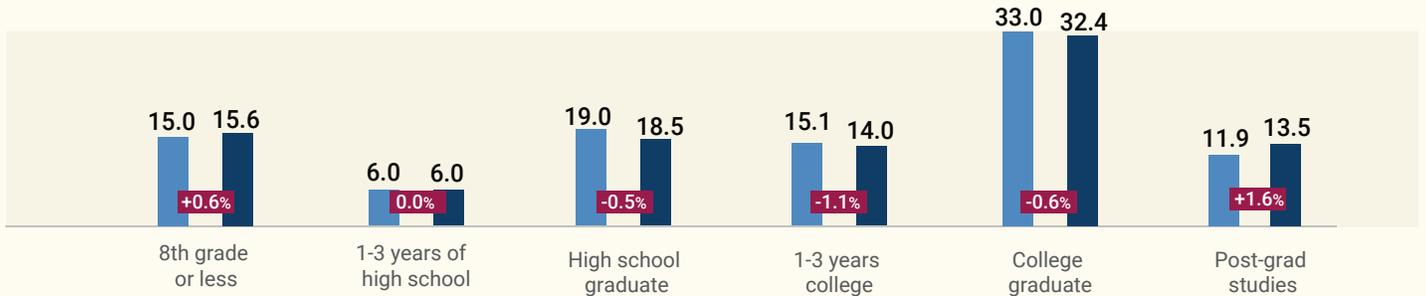
The numbers and percentages above are based on 5.1M total cross-country skiing participants

SIA Participation Study 2018

PARTICIPANTS BY EDUCATION & FREQUENCY

2016-2017 2017-2018

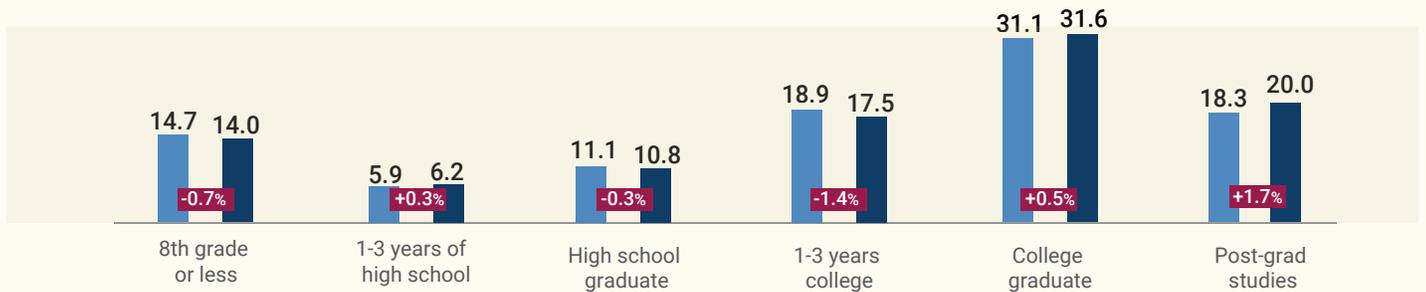
1 Time



2 Times



3-6 Times



7+ Times



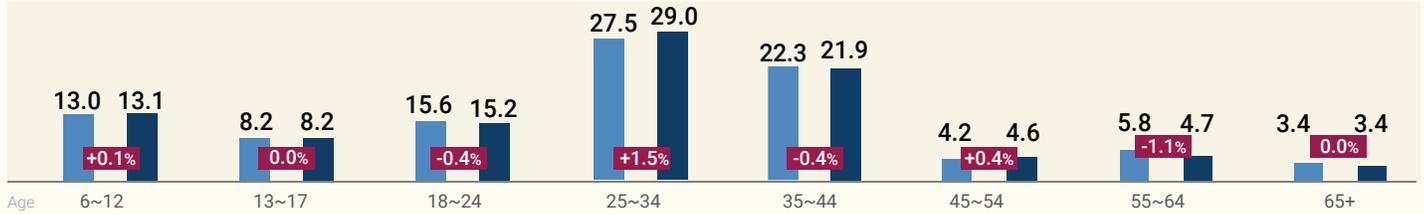
The numbers and percentages above are based on 5.1M total cross-country skiing participants

SIA Participation Study 2018

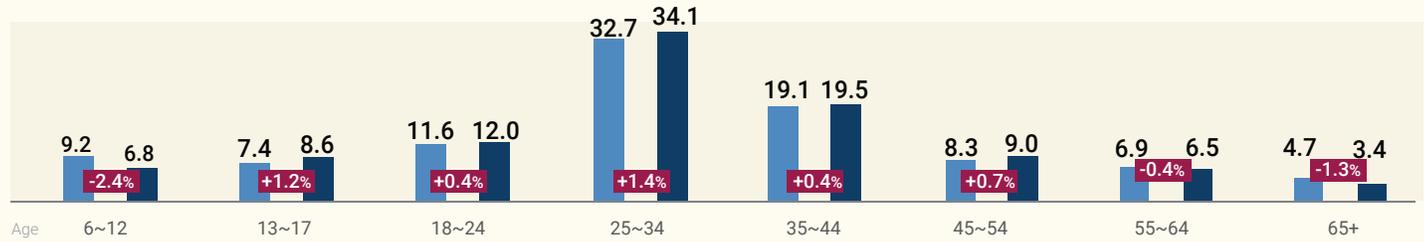
PARTICIPATION BY AGE & FREQUENCY

■ 2016-2017 ■ 2017-2018

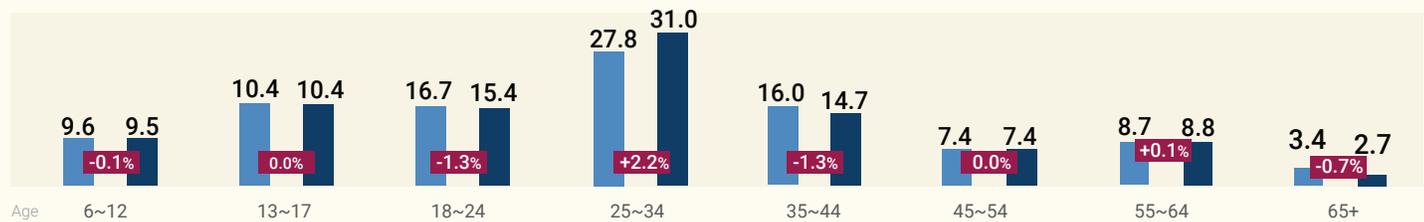
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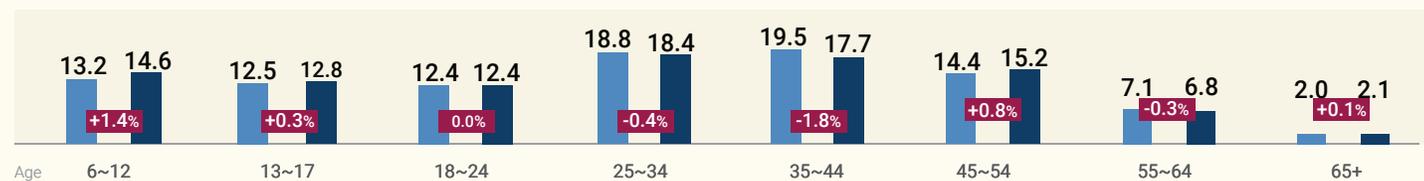
2 Times



3-6 Times



7+ Times

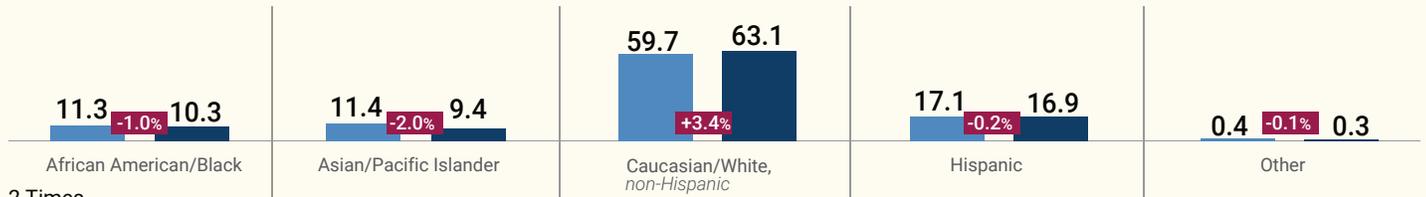


The numbers and percentages above are based on 5.1M total cross-country skiing participants
SIA Participation Study 2018

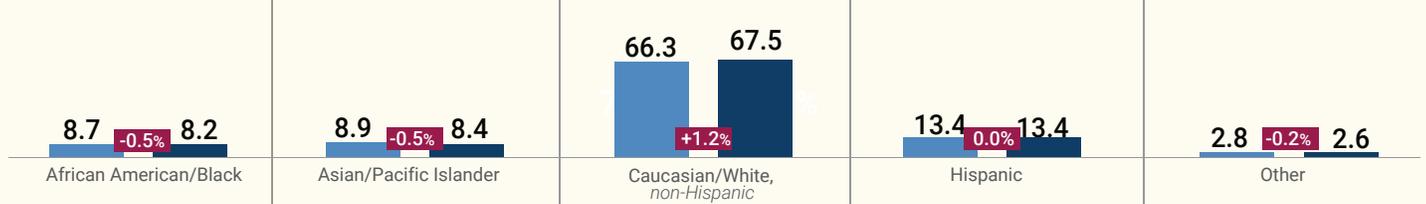
PARTICIPATION BY ETHNICITY & FREQUENCY

■ 2016-2017 ■ 2017-2018

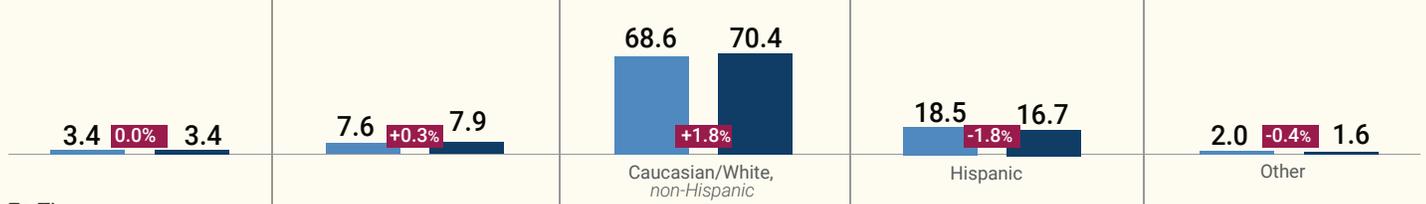
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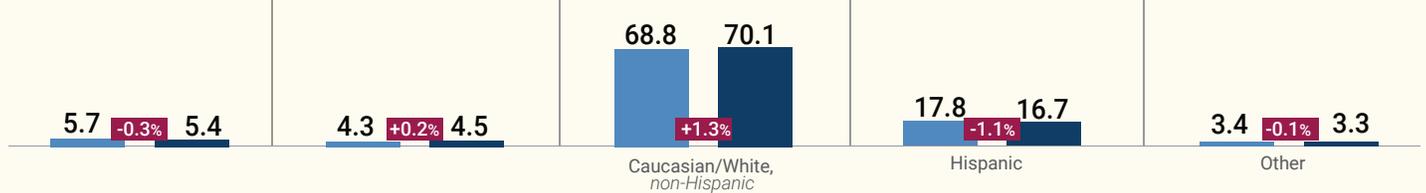
2 Times



3 - 6 Times

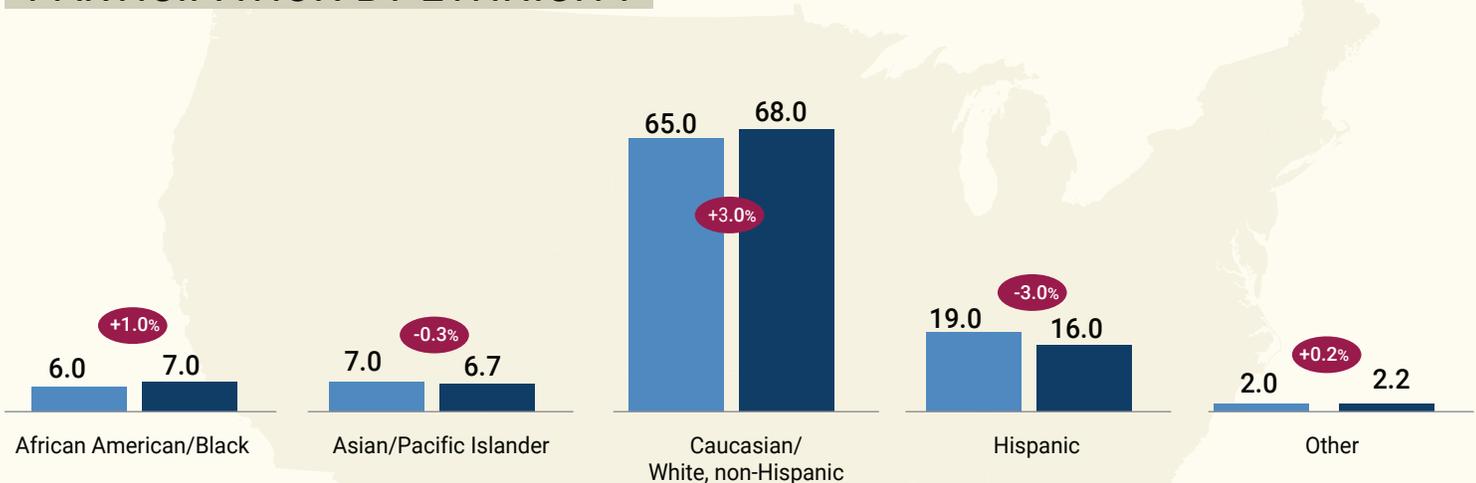


7+ Times



PARTICIPATION BY ETHNICITY

■ 2016-2017 ■ 2017-2018



The numbers and percentages above are based on 5.1M total cross-country skiing participants

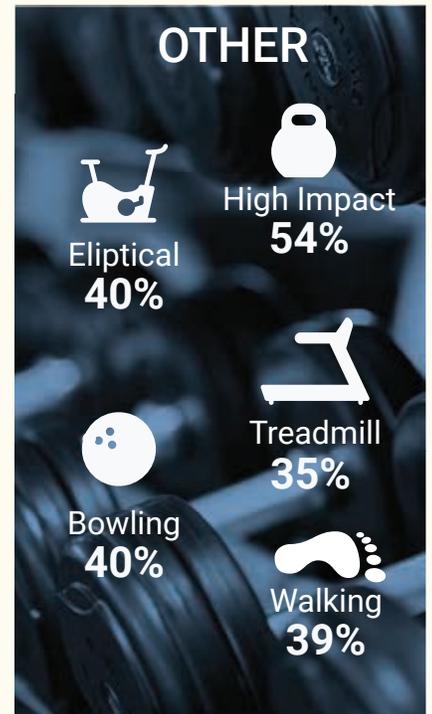
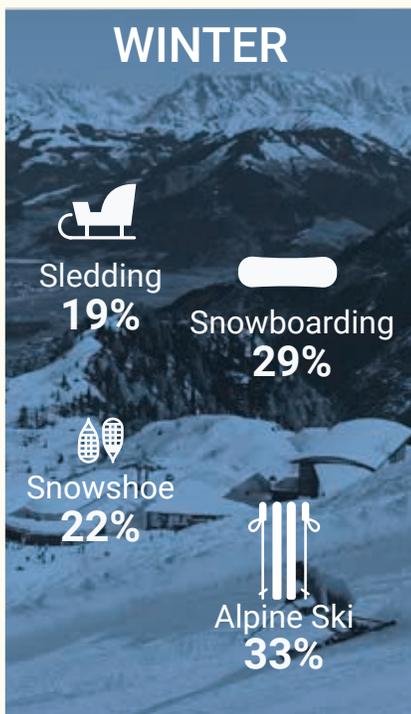
SIA Participation Study 2018

PARTICIPATION BY INCOME & FREQUENCY

■ 2016-2017 ■ 2017-2018



CROSSOVER ACTIVITIES



The numbers and percentages above are based on 5.1M total cross-country skiing participants

SIA Participation Study 2018

GAIN/LOSS OF ACTIVE PARTICIPANTS

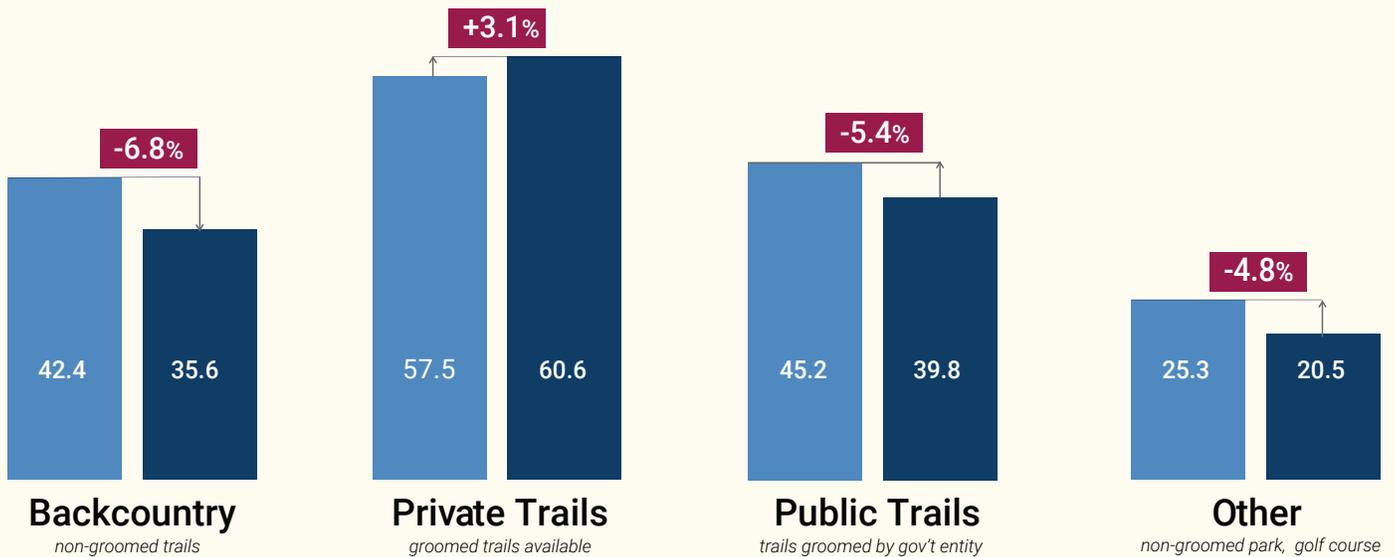
■ 2016-2017 ■ 2017-2018

In 2016/2017 there were 5.06M participants. In 2017/2018, 3.53M participants were new/returned and 3.49M participants took the season off. The total for 2017/2018 was 5.1M participants.



CROSS-COUNTRY SKIING TRAILS

■ 2016-2017 ■ 2017-2018



The numbers and percentages above are based on 5.1M total cross-country skiing participants

SIA Participation Study 2018



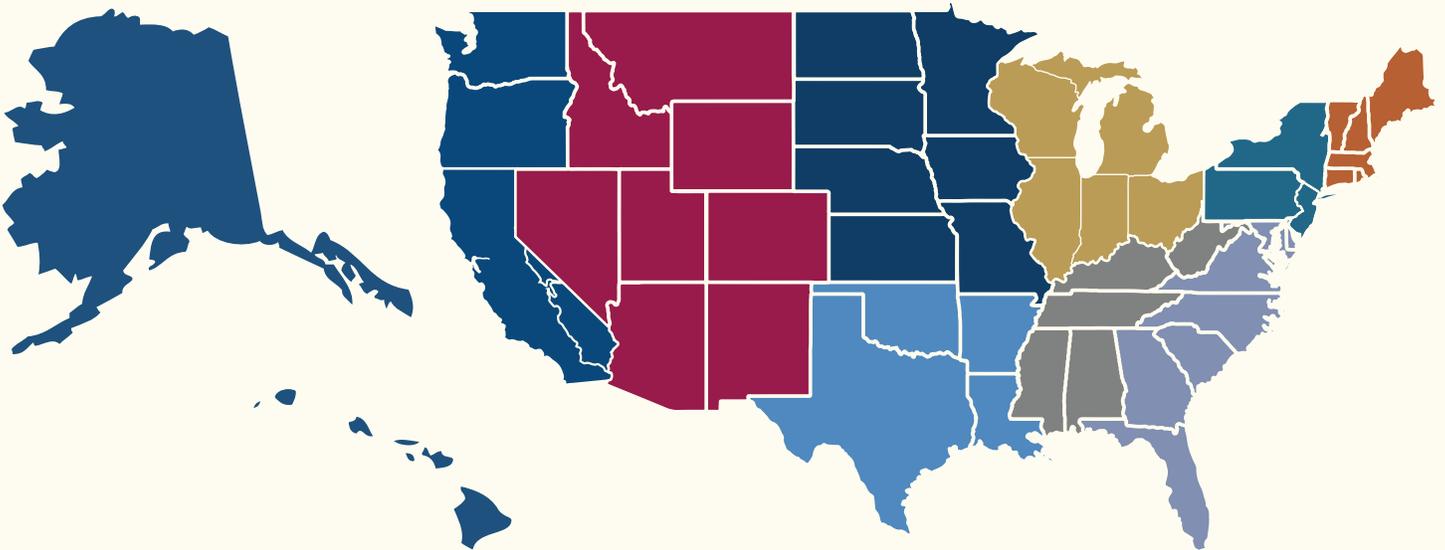
Snowsports
Industries
America



Snowshoe Participation and Demographics

SNOWSHOE BY REGION

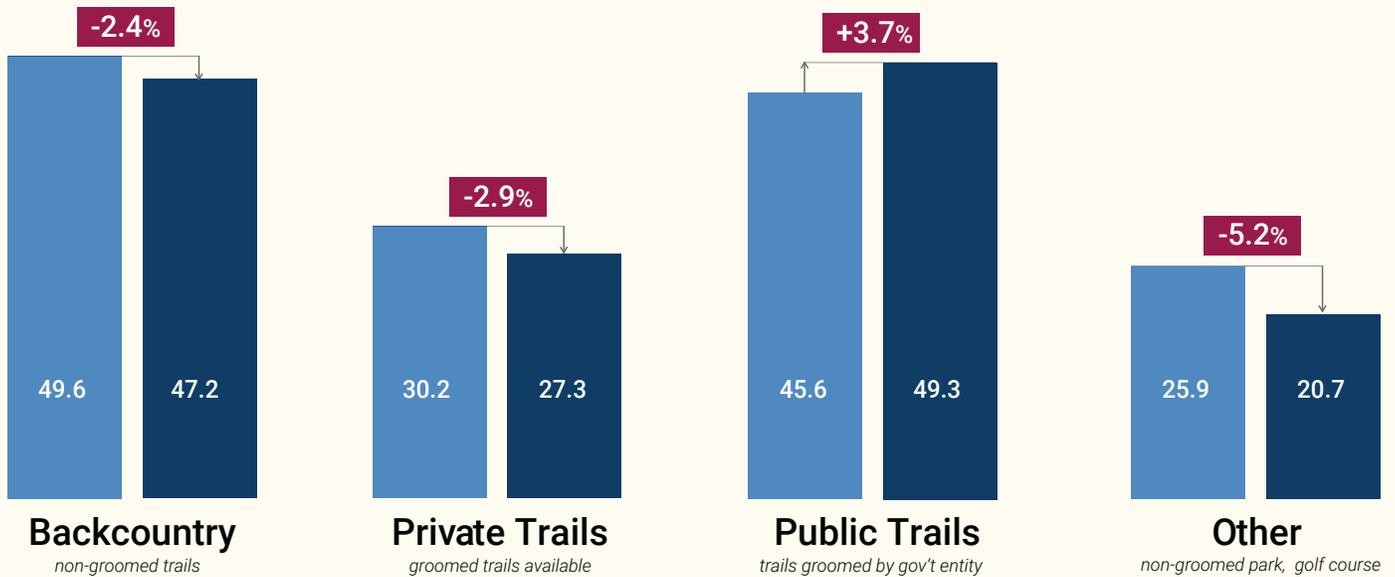
TOTAL PARTICIPANTS: 3.5M



PACIFIC	651K	WEST NORTH CENTRAL	248K	NEW ENGLAND	302K
MOUNTAIN	398K	EAST NORTH CENTRAL	442K	MIDDLE ATLANTIC	606K
WEST SOUTH CENTRAL	258K	EAST SOUTH CENTRAL	110K	SOUTH ATLANTIC	516K

SNOWSHOE TRAILS

■ 2016-2017 ■ 2017-2018

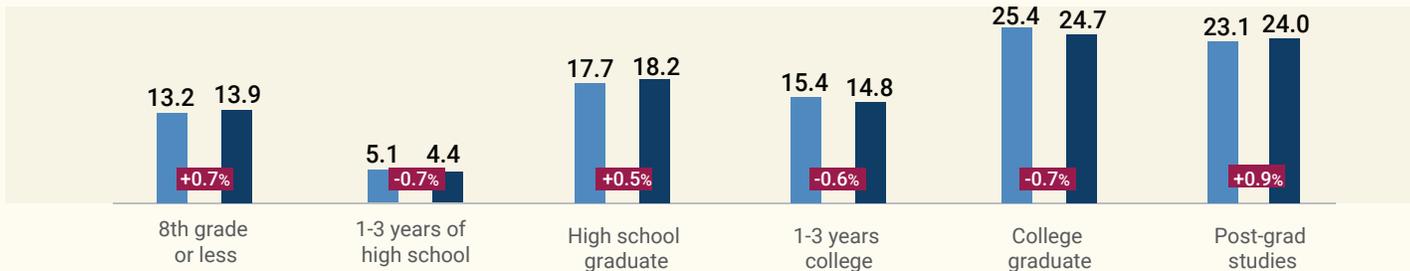


The numbers and percentages above are based on 3.5M total snowshoe participants
SIA Participation Study 2018

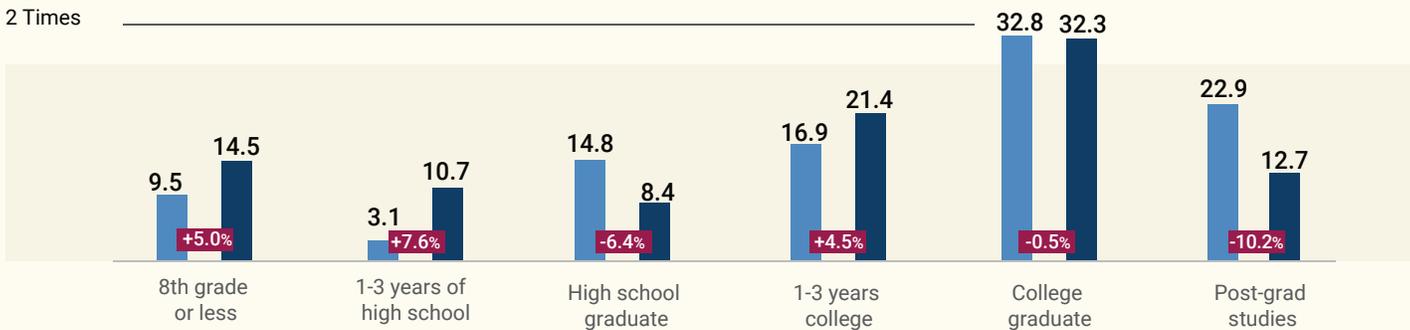
PARTICIPANTS BY EDUCATION & FREQUENCY

■ 2016-2017 ■ 2017-2018

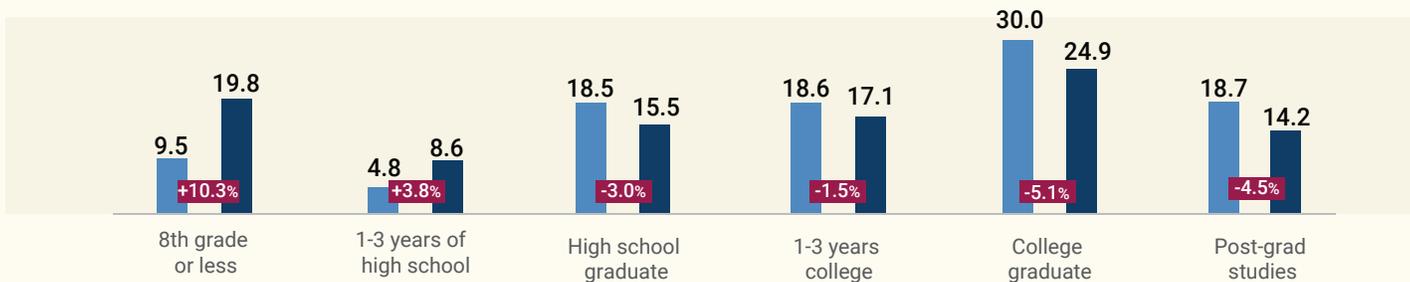
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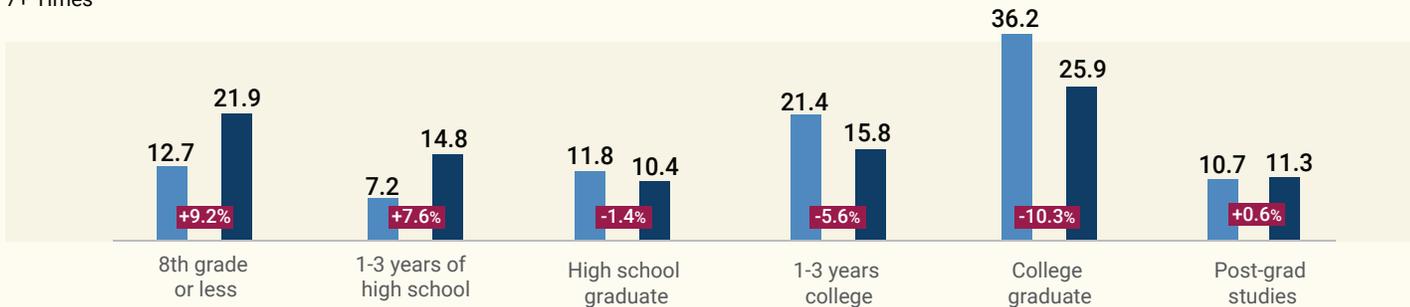
2 Times



3-6 Times



7+ Times



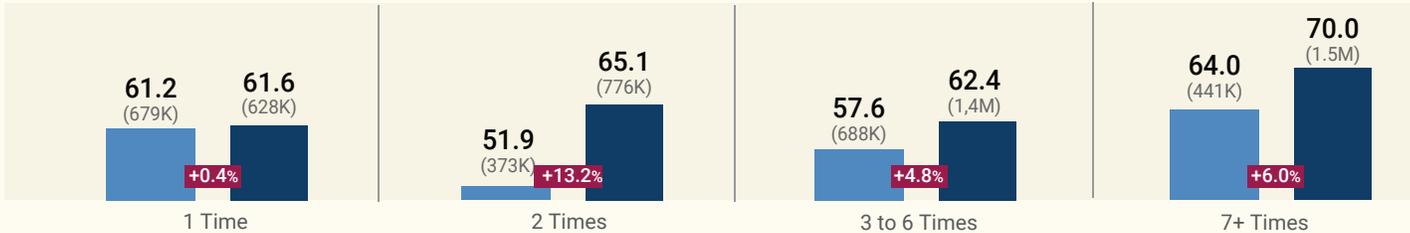
The numbers and percentages above are based on 3.5M total snowshoe participants

SIA Participation Study 2018

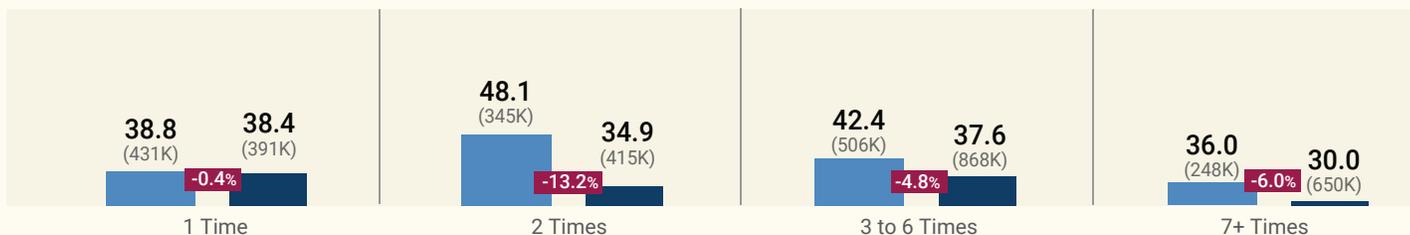
PARTICIPANTS BY GENDER & FREQUENCY

■ 2016-2017 ■ 2017-2018

Male



Female



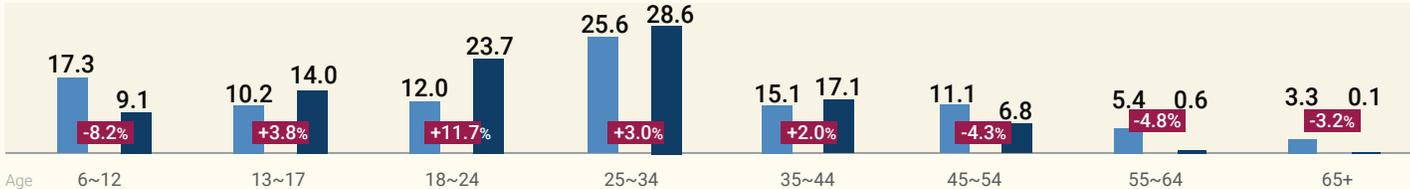
PARTICIPANTS BY AGE & FREQUENCY

■ 2016-2017 ■ 2017-2018

1 Time



2 Times



3-6 Times



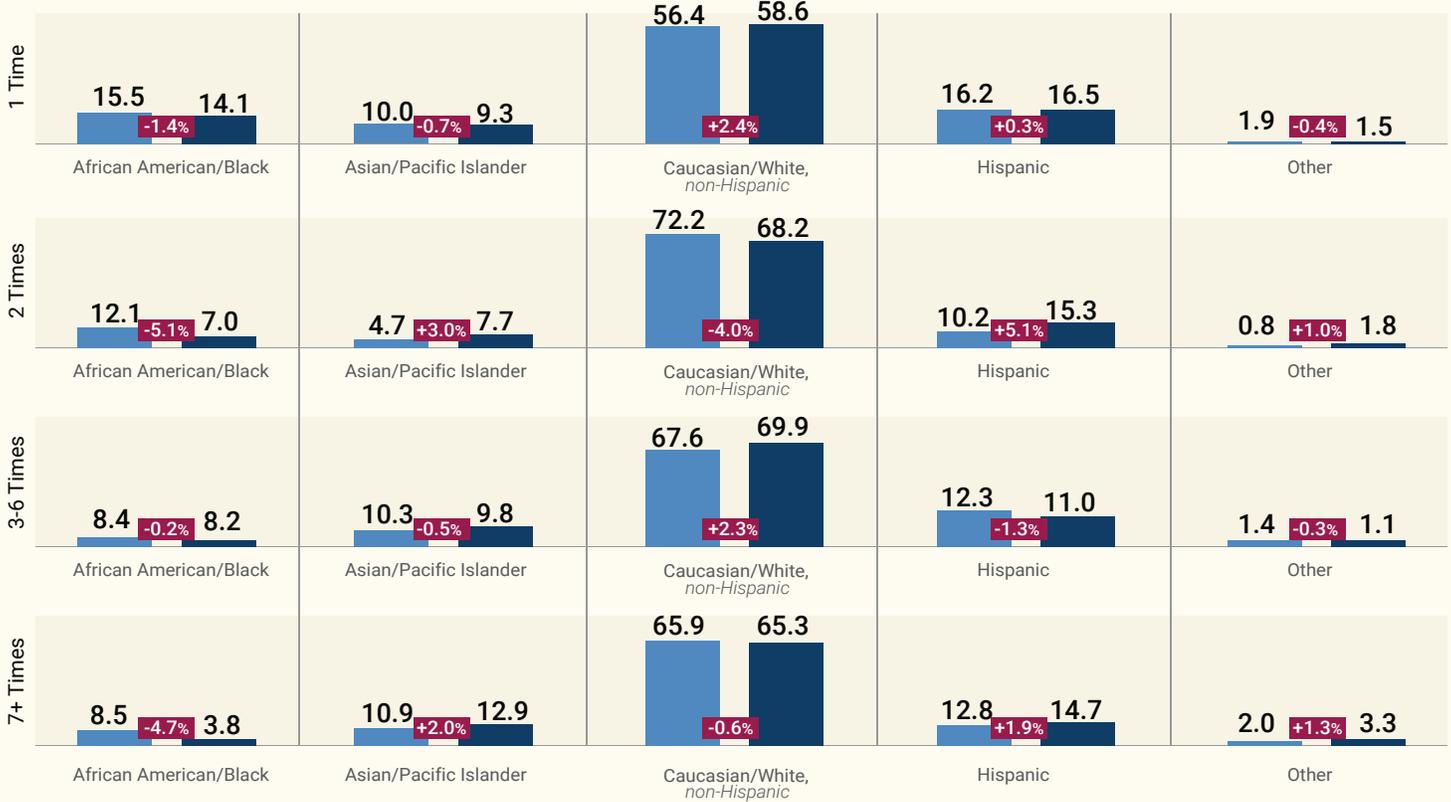
7+ Times



The numbers and percentages above are based on 3.5M total snowshoe participants
SIA Participation Study 2018

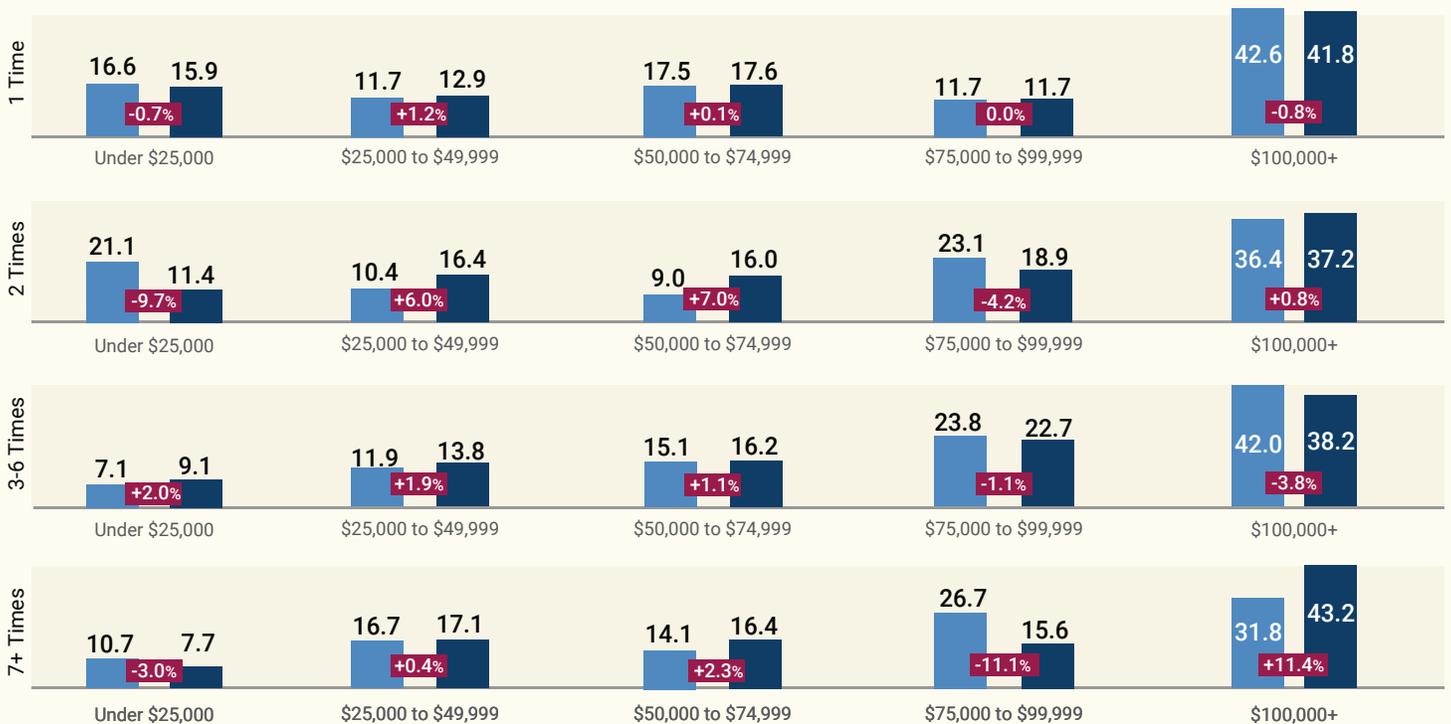
PARTICIPANTS BY ETHNICITY & FREQUENCY

■ 2016-2017 ■ 2017-2018



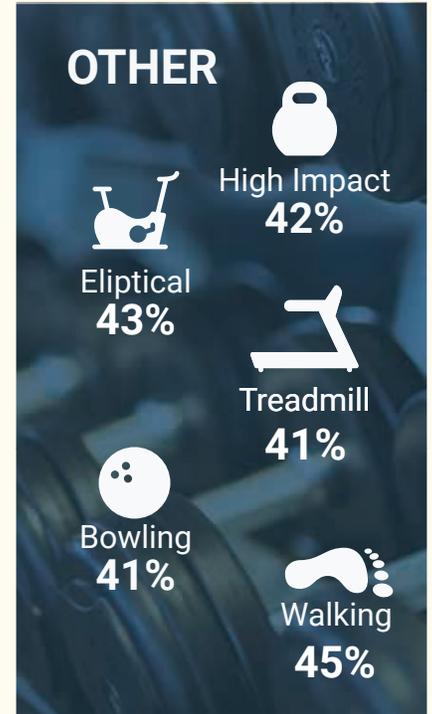
PARTICIPANTS BY INCOME & FREQUENCY

■ 2016-2017 ■ 2017-2018



The numbers and percentages above are based on 3.5M total snowshoe participants

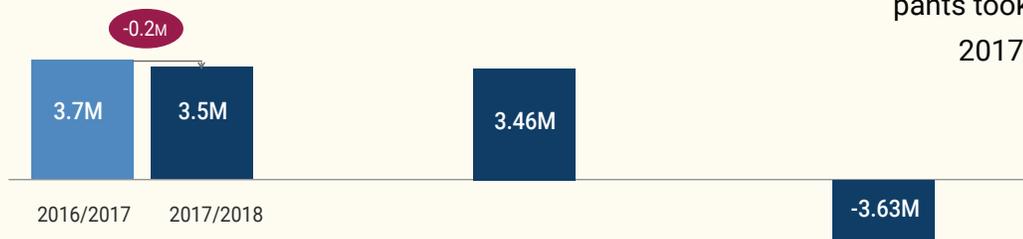
CROSSOVER ACTIVITIES



GAIN/LOSS OF ACTIVE PARTICIPANTS

■ 2016-2017 ■ 2017-2018

In 2016/2017 there were 3.7M participants. In 2017/2018, 3.46M participants were new/returned and 3.63M participants took the season off. The total for 2017/2018 was 3.5M participants.



Total Participants New/Returning Participants Took Season Off

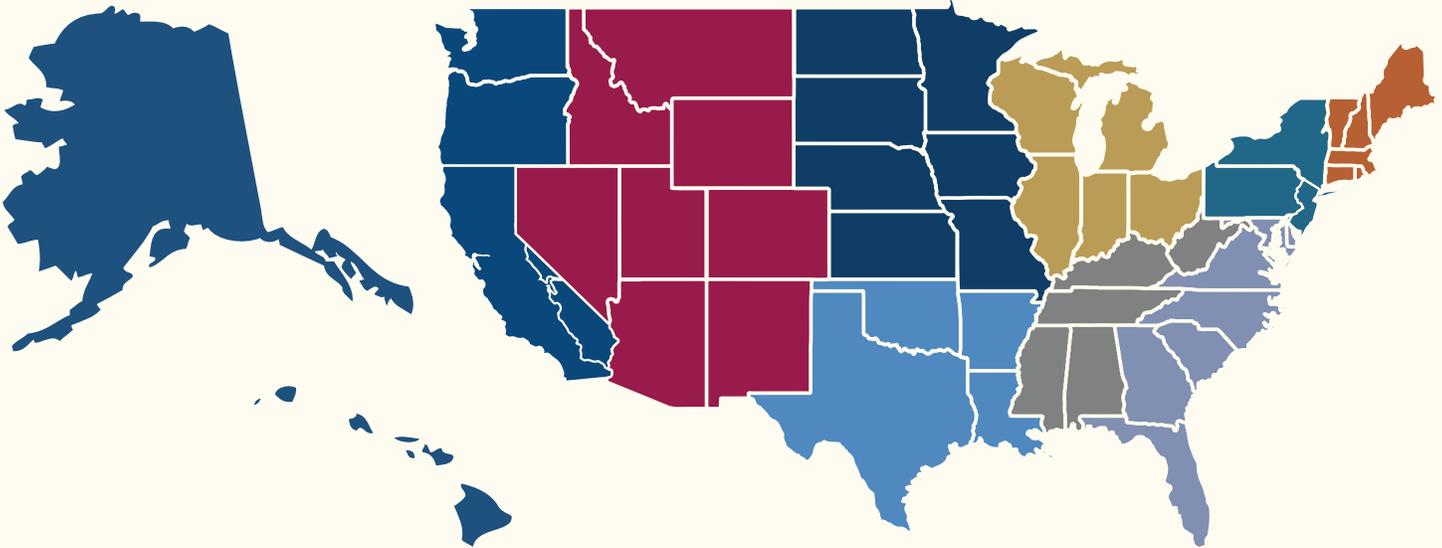


The numbers and percentages above are based on 3.5M total snowshoe participants
SIA Participation Study 2018

Snowboard Touring Participation and Demographics

SNOWBOARD TOURING¹ BY REGION

TOTAL PARTICIPANTS: 682K



PACIFIC 13.4%	WEST NORTH CENTRAL 2.2%	NEW ENGLAND 5.3%
MOUNTAIN 9.1%	EAST NORTH CENTRAL 20.9%	MIDDLE ATLANTIC 20.2%
WEST SOUTH CENTRAL 4.4%	EAST SOUTH CENTRAL 2.2%	SOUTH ATLANTIC 22.0%

PARTICIPATION BY GENDER



24%
Female



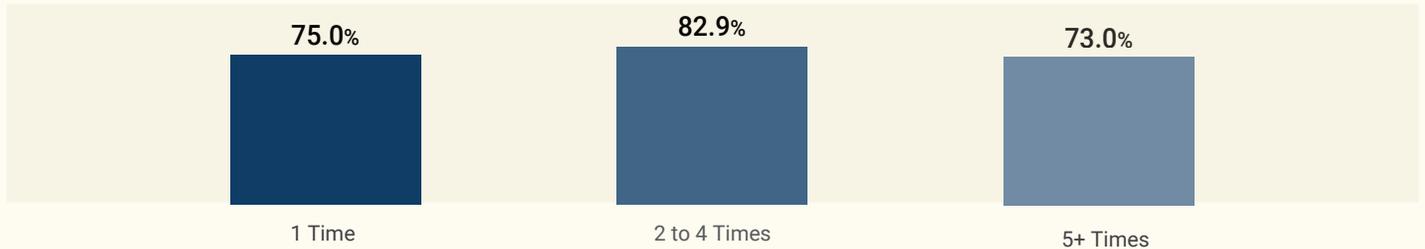
76%
Male

The numbers and percentages above are based on 682K total snowboard touring participants

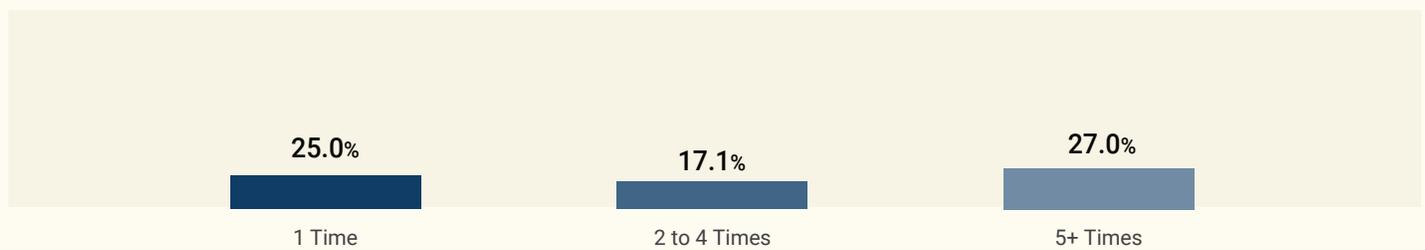
PARTICIPATION BY GENDER & FREQUENCY

■ 2017-2018

Male



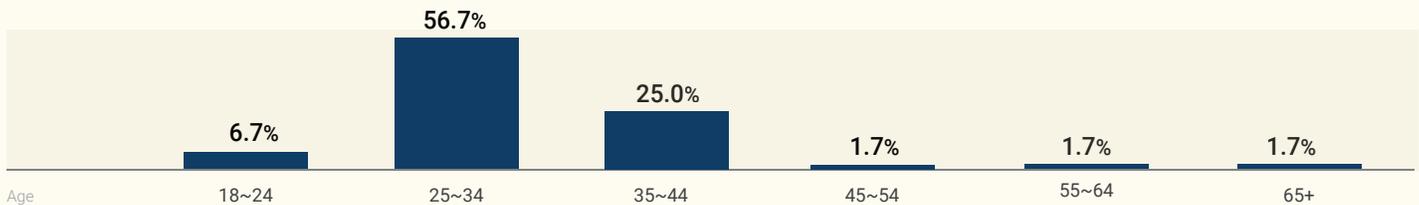
Female



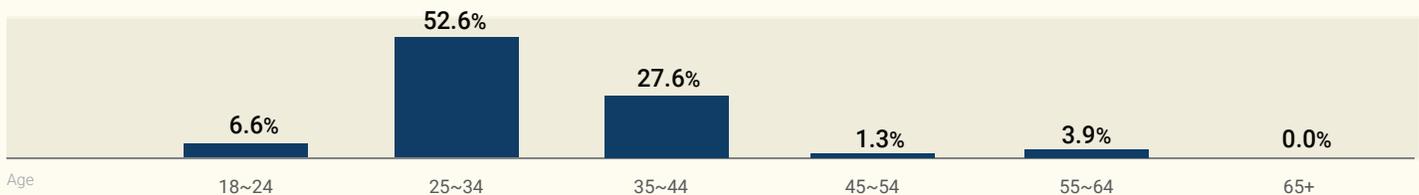
PARTICIPATION BY AGE & FREQUENCY

■ 2017-2018

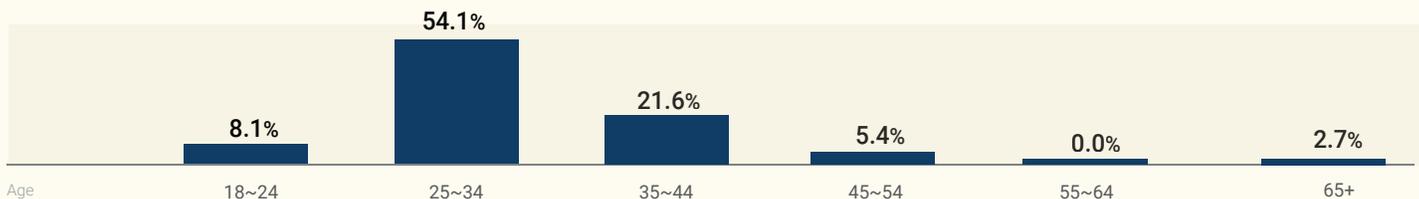
1 Time



2 to 4 times



5+ Times



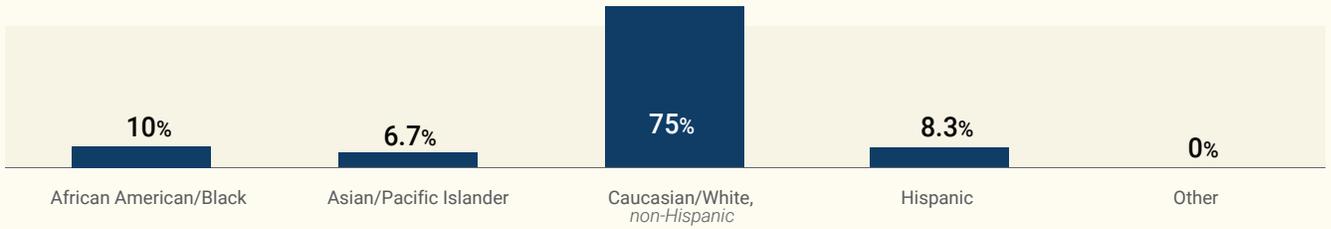
The numbers and percentages above are based on 682K total snowboard touring participants

SIA Participation Study 2018

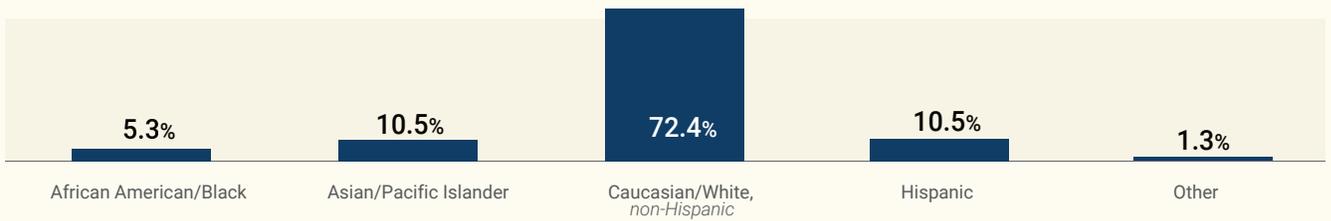
PARTICIPATION BY ETHNICITY & FREQUENCY

2017-2018

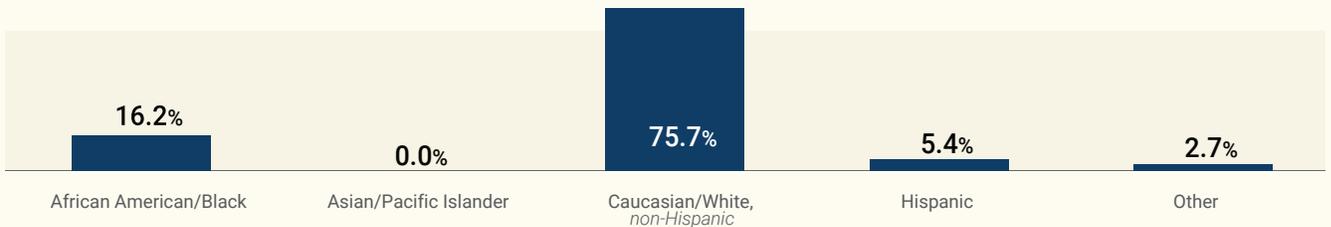
1 Time



2 to 4 times

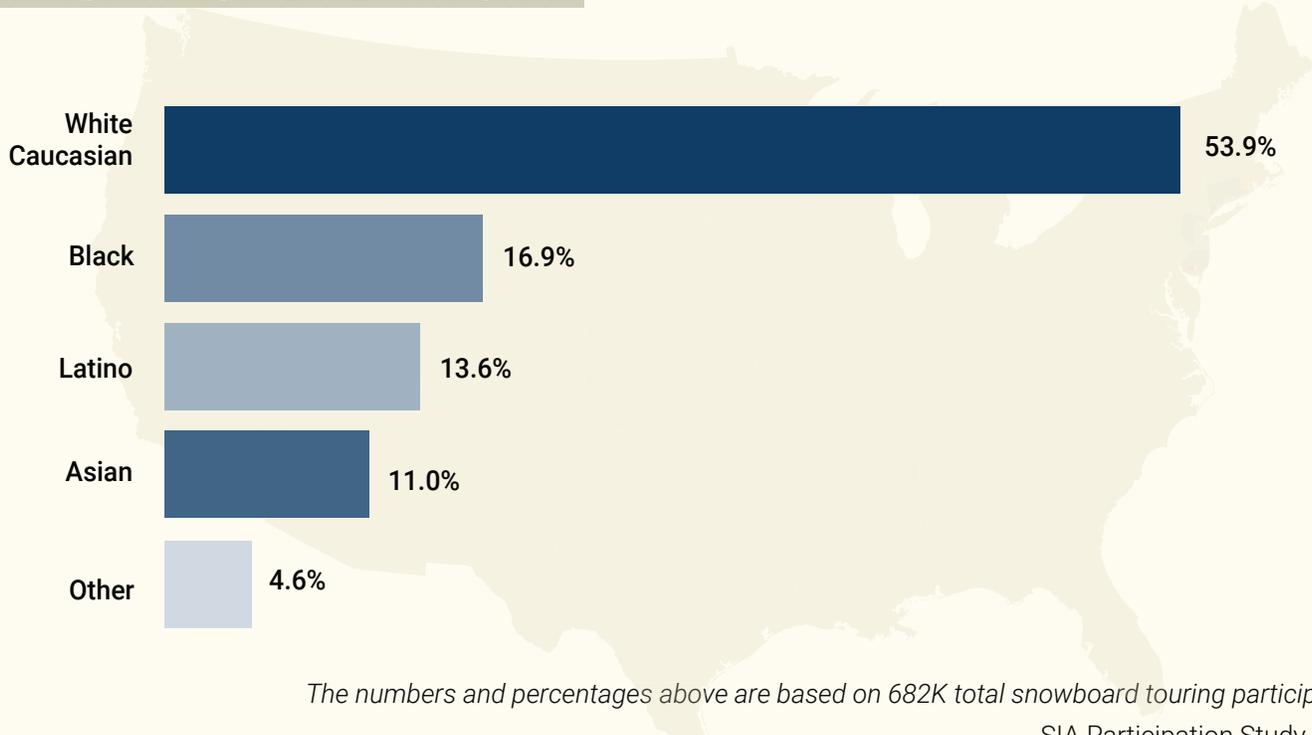


5+ Times



PARTICIPATION BY ETHNICITY

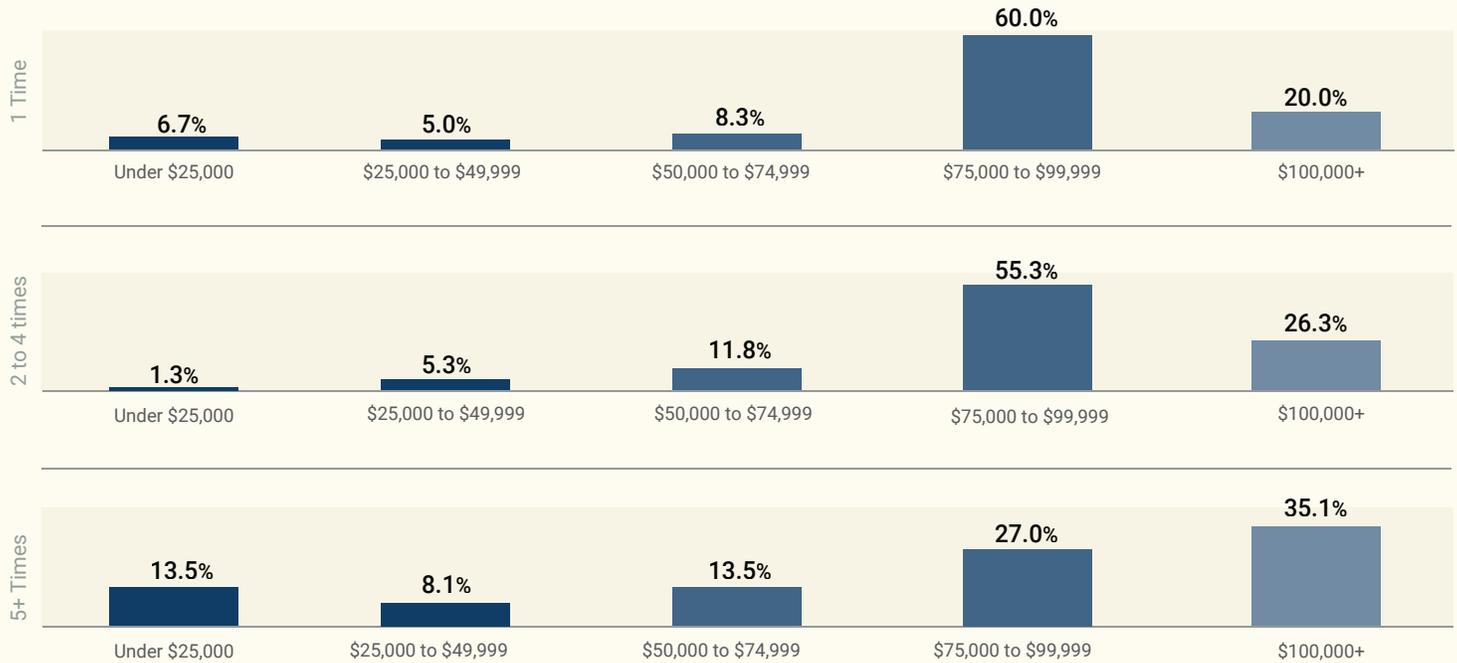
2017-2018



The numbers and percentages above are based on 682K total snowboard touring participants
SIA Participation Study 2018

PARTICIPATION BY INCOME & FREQUENCY

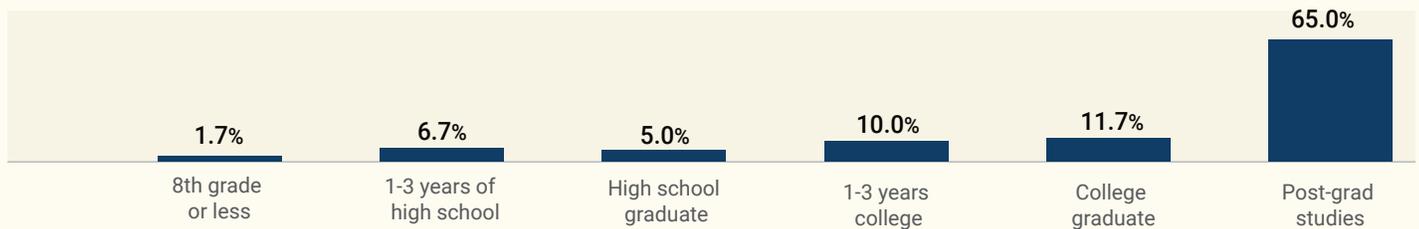
■ 2017-2018



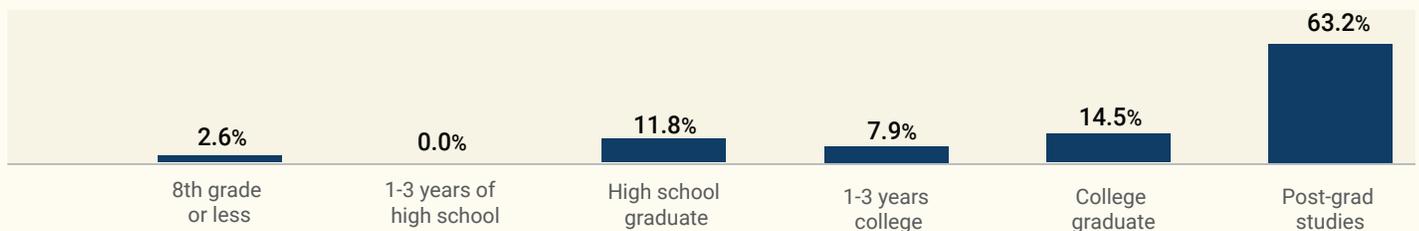
PARTICIPATION BY EDUCATION & FREQUENCY

■ 2017-2018

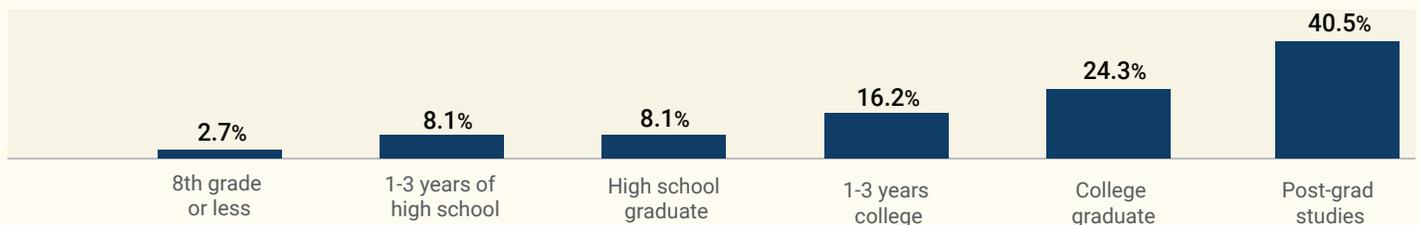
1 Times



2 to 4 times



5+ Times



The numbers and percentages above are based on 682K total snowboard touring participants

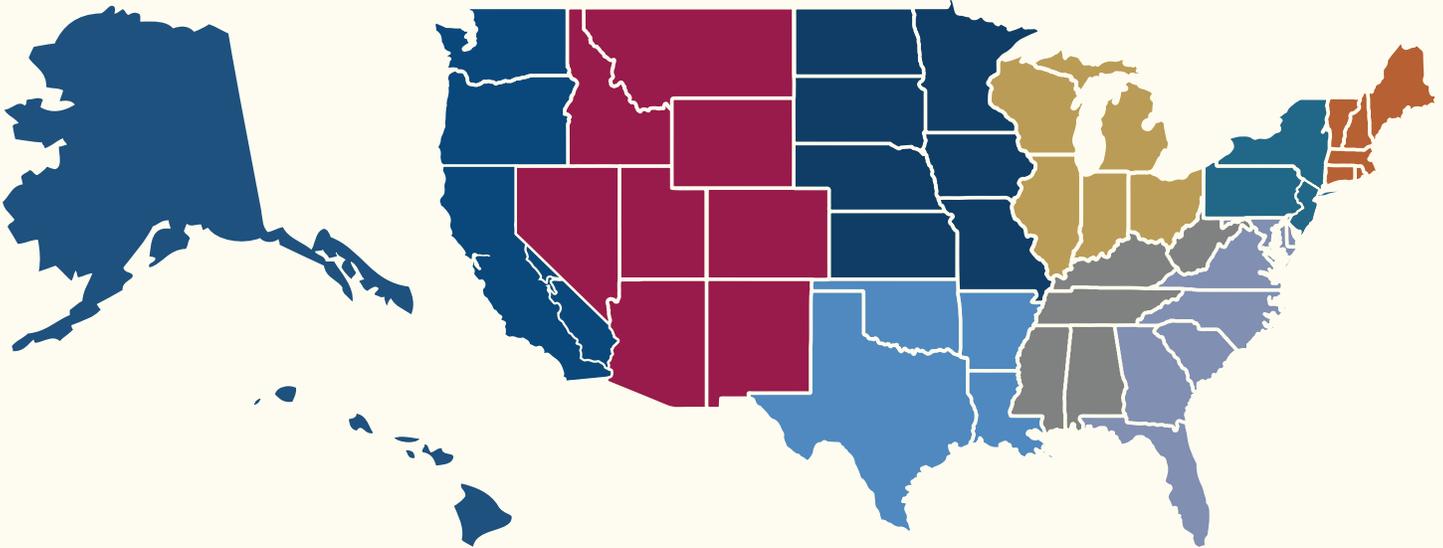
SIA Participation Study 2018



Alpine Touring Participation and Demographics

ALPINE TOURING¹ BY REGION

TOTAL PARTICIPANTS: 703K



PACIFIC	11.8%	WEST NORTH CENTRAL	3.9%	NEW ENGLAND	9.7%
MOUNTAIN	10.8%	EAST NORTH CENTRAL	19.7%	MIDDLE ATLANTIC	17.7%
WEST SOUTH CENTRAL	7.6%	EAST SOUTH CENTRAL	0.8%	SOUTH ATLANTIC	17.8%

PARTICIPATION BY GENDER



36.2%
Female



63.8%
Male

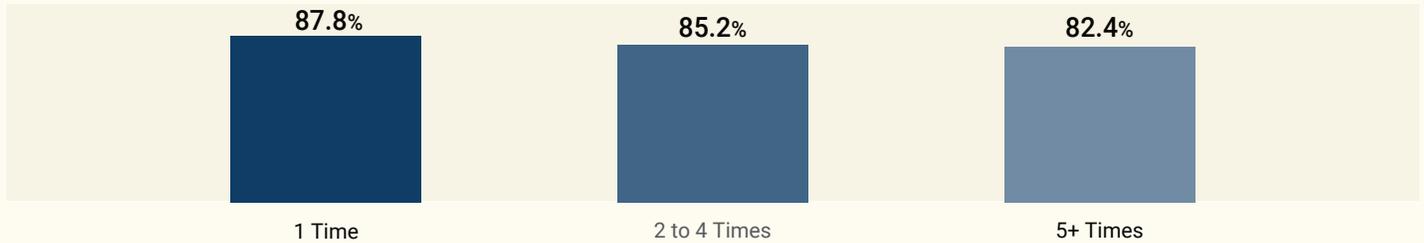
The numbers and percentages above are based on 703K total alpine touring participants

43 ¹ The numbers herein reflect backcountry (non-resort) only aged 18 and above, as compared to last year's numbers that encompassed a greater variety of terrain and participants aged 6 and above.

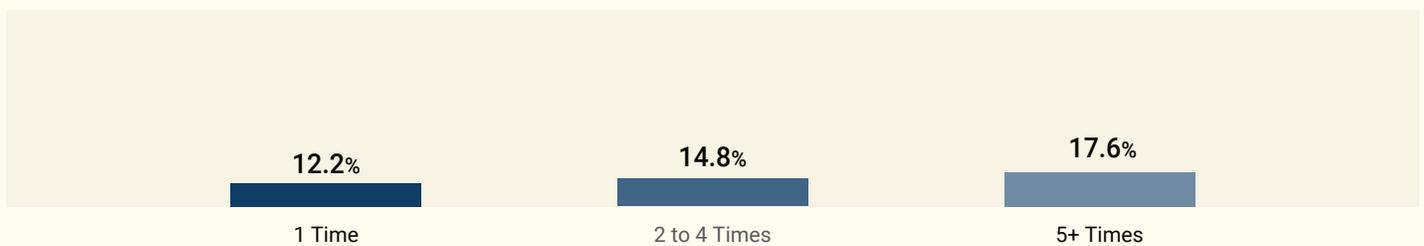
PARTICIPATION BY GENDER & FREQUENCY

2017-2018

Male



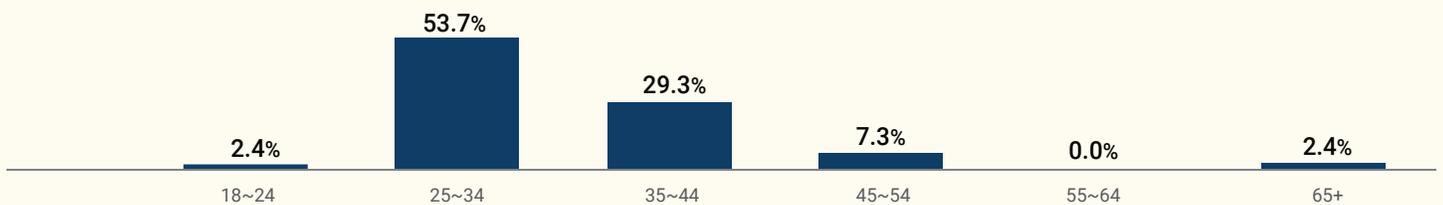
Female



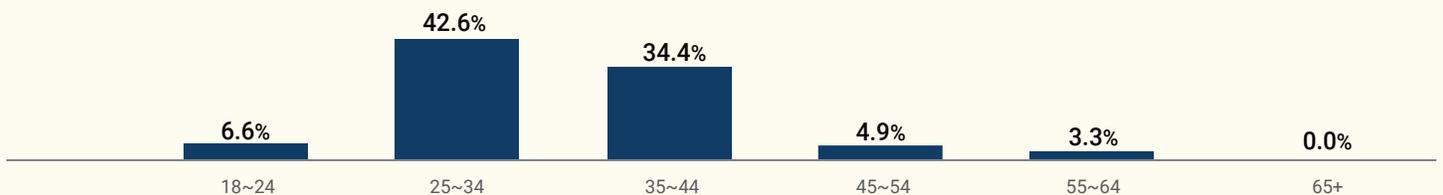
PARTICIPATION BY AGE & FREQUENCY

2017-2018

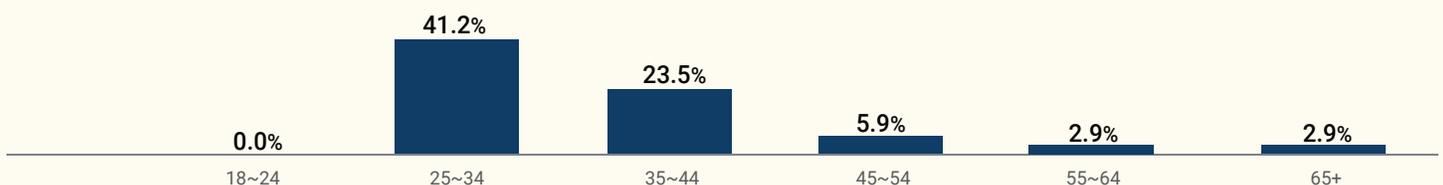
1 Time



2 to 4 Times



5+ Times



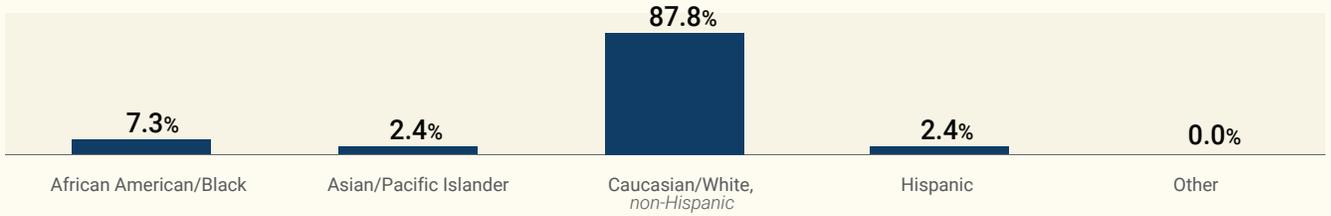
The numbers and percentages above are based on 703K total alpine touring participants

SIA Participation Study 2018

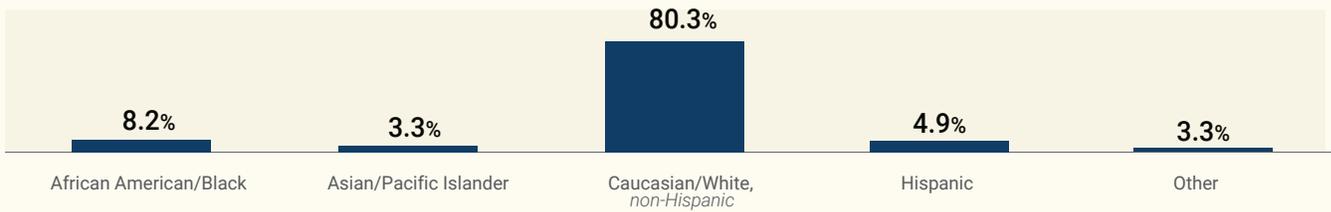
PARTICIPATION BY ETHNICITY & FREQUENCY

■ 2017-2018

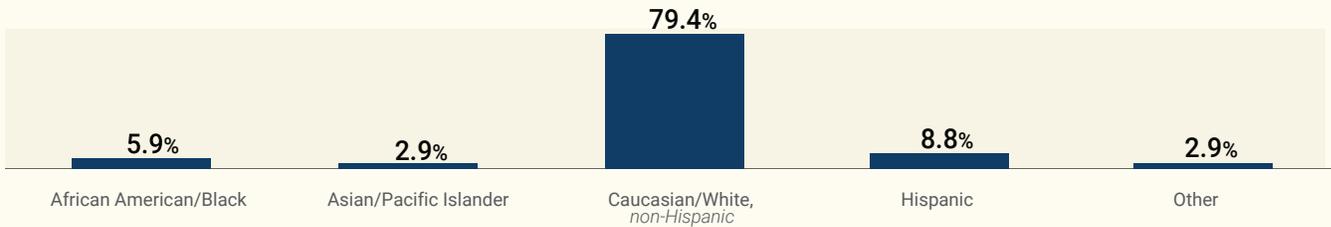
1 Time



2 to 4 Times

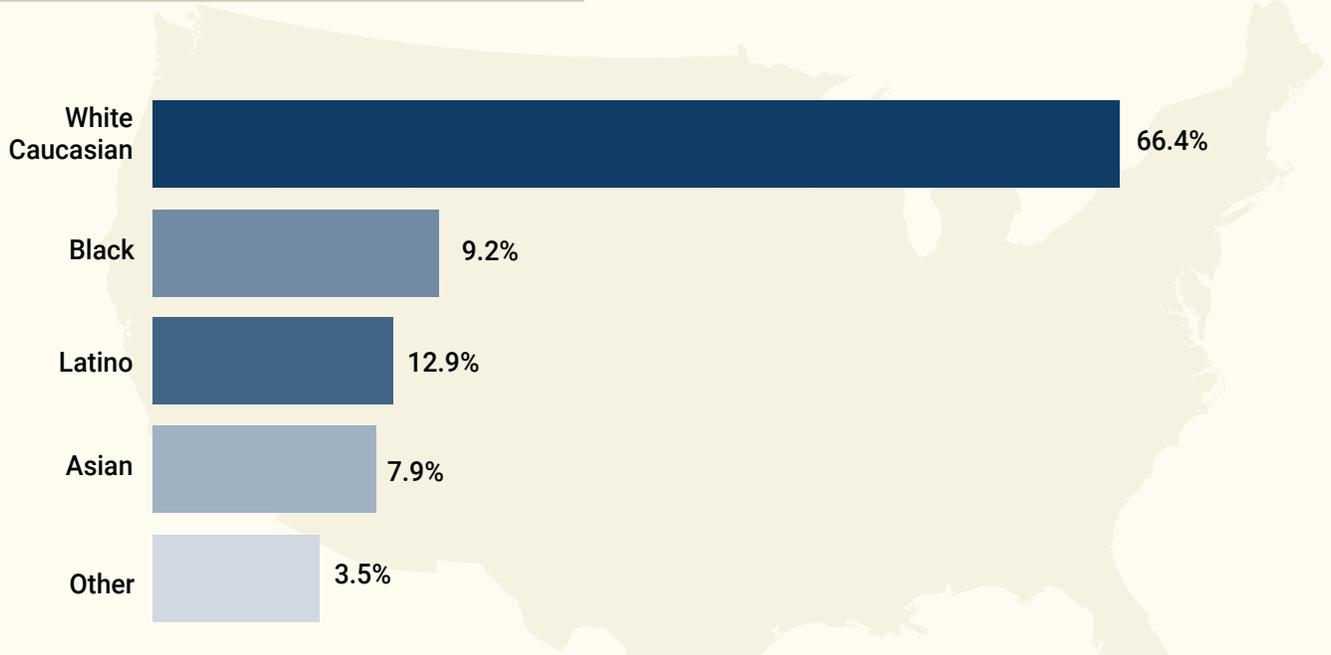


5+ Times



PARTICIPATION BY ETHNICITY

■ 2017-2018

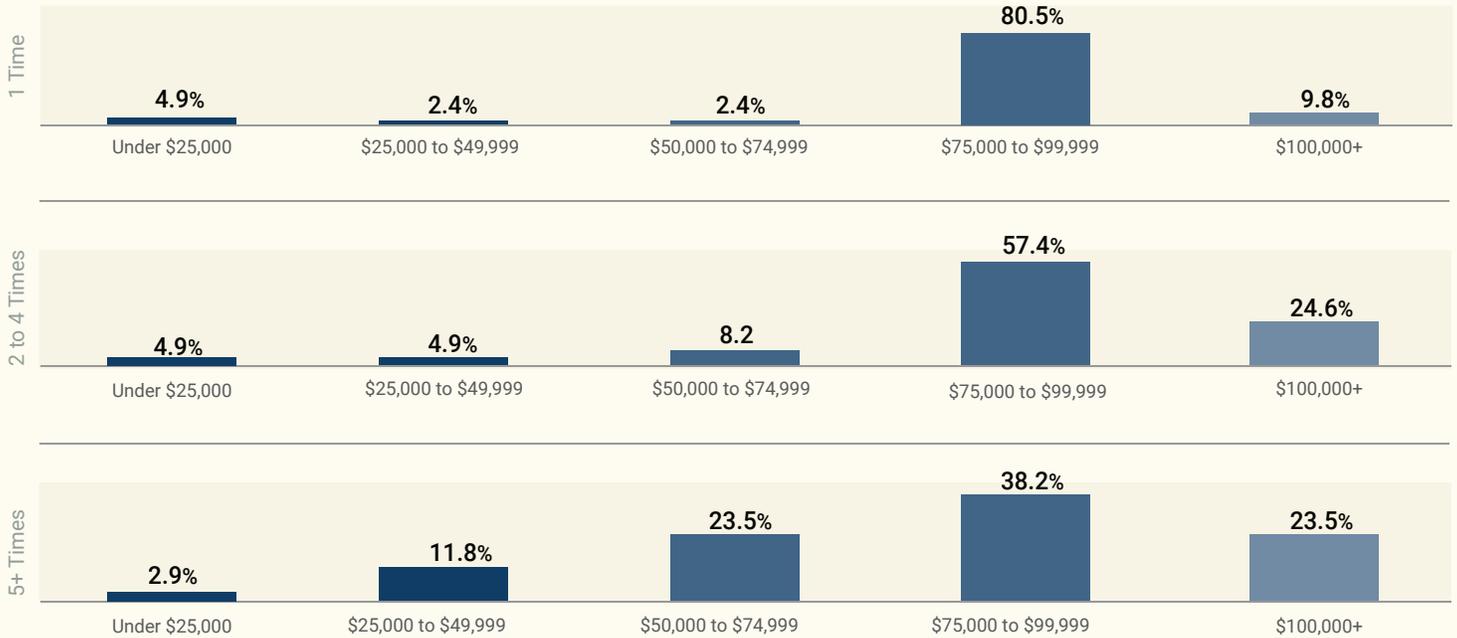


The numbers and percentages above are based on 703K total alpine touring participants

SIA Participation Study 2018

PARTICIPATION BY INCOME & FREQUENCY

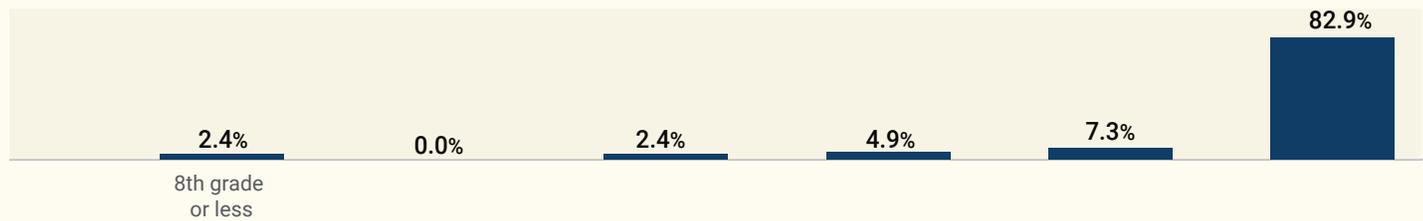
■ 2017-2018



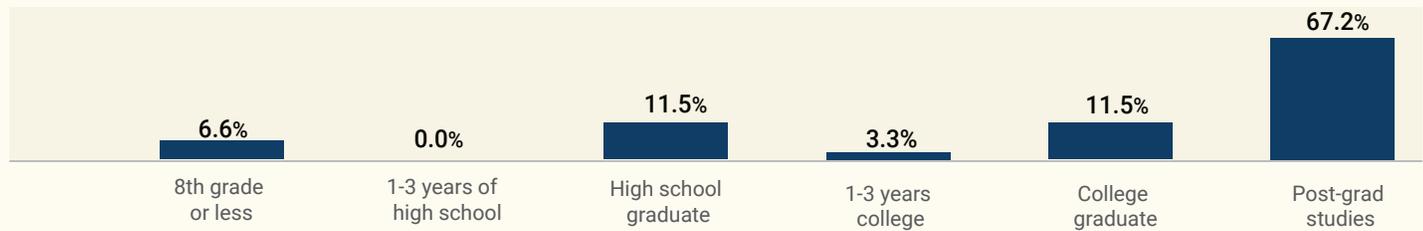
PARTICIPATION BY EDUCATION & FREQUENCY

■ 2017-2018

1 Times



2 to 4 Times



5+ Times



The numbers and percentages above are based on 703K total alpine touring participants

SIA Participation Study 2018



| Methodology

METHODOLOGY:

The Snow Sports Participant Report 2018 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 2017 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. 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 2017 seasonal participation survey sample size of 30,999 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 0.27 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 298,325,103 people ages six and older.

RESEARCH, EDUCATION, PARTICIPATION.

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, retail data, snow sports participation and custom reports.

For research inquiries contact
cedwards@snowsports.org