



SIA MONTHLY RETAIL REPORT: NOVEMBER

SALES - DOLLARS

ALL	YTD	AUG 2018-NOV 2018	\$2,709,210
		AUG 2019-NOV 2019	\$2,545,799
	CURRENT PERIOD	NOV 2018	\$1,461,336
		NOV 2019	\$1,320,753

SALES - CHANNEL - DOLLARS

CHAIN	YTD	AUG 2018-NOV 2018	\$1,149,585
		AUG 2019-NOV 2019	\$1,048,592
	CURRENT PERIOD	NOV 2018	\$556,620
		NOV 2019	\$491,817
INTERNET	YTD	AUG 2018-NOV 2018	\$596,471
		AUG 2019-NOV 2019	\$512,864
	CURRENT PERIOD	NOV 2018	\$344,631
		NOV 2019	\$275,384
SPECIALTY	YTD	AUG 2018-NOV 2018	\$963,154
		AUG 2019-NOV 2019	\$984,344
	CURRENT PERIOD	NOV 2018	\$560,084
		NOV 2019	\$553,552

SALES - REGION (SPECIALTY ONLY) - DOLLARS

MIDWEST	YTD	AUG 2018-NOV 2018	\$224,086
		AUG 2019-NOV 2019	\$211,729
	CURRENT PERIOD	NOV 2018	\$130,275
		NOV 2019	\$117,111
NORTHEAST	YTD	AUG 2018-NOV 2018	\$294,835
		AUG 2019-OCT 2019	\$316,158
	CURRENT PERIOD	NOV 2018	\$164,108
		OCT 2019	\$172,164
SOUTH	YTD	AUG 2018-NOV 2018	\$89,328
		AUG 2019-NOV 2019	\$91,641
	CURRENT PERIOD	NOV 2018	\$54,376
		NOV 2019	\$56,452
WEST	YTD	AUG 2018-NOV 2018	\$354,904
		AUG 2019-NOV 2019	\$364,815
	CURRENT PERIOD	NOV 2018	\$211,325
		NOV 2019	\$207,825

SALES - GENDER - DOLLARS

MENS	YTD	AUG 2018-NOV 2018	\$1,473,659
		AUG 2019-NOV 2019	\$1,393,662
WOMENS	YTD	AUG 2018-NOV 2018	\$944,815
		AUG 2019-NOV 2019	\$862,667
YOUTH	YTD	AUG 2018-NOV 2018	\$237,233
		AUG 2019-NOV 2019	\$233,325
	CURRENT PERIOD	NOV 2018	\$116,033
		NOV 2019	\$111,168
NOT SPECIFIED	YTD	AUG 2018-NOV 2018	\$53,504
		AUG 2019-NOV 2019	\$56,145
	CURRENT PERIOD	NOV 2018	\$31,310
		NOV 2019	\$31,863



EACH MONTH, ALONG WITH THEIR REPORT, NPD PROVIDES A VIDEO RECORDING WHERE THEY TAKE THE AUDIENCE THROUGH THE REPORT EXPLAINING HOW TO USE IT WHILE THEY HIGHLIGHT KEY INSIGHTS. THE FOLLOWING ARE THE NOTES FROM THIS RECORDING.



• GENERAL DESCRIPTION OF DATA AND HOW TO USE THE REPORT (0:00 – 3:43)



• CURRENT PERIOD AND SEASON TO DATE - NOV. 2019 (3:43 – 4:48)

- IT IS IMPORTANT TO NOTE HOW BLACK FRIDAY AND CYBER MONDAY FELL IN 2018 AS COMPARED TO 2019. IN 2018, THESE BOTH FELL IN NOVEMBER. IN 2019, CYBER MONDAY FELL IN DECEMBER. THIS IS IMPORTANT TO CONSIDER WHEN INTERPRETING THE PERIOD-OVER-PERIOD DATA FOR NOVEMBER AND SEASON TO DATE.
- GENERALLY, ALL DOLLARS AND UNITS ARE DOWN, ONCE AGAIN CONSIDERING HOW THE 2018 HOLIDAY SHOPPING SEASON DIFFERS FROM THE 2019 SHOPPING SEASON



• CATEGORY BREAKDOWN – SEASON TO DATE (4:48 – 10:09)

- ◇ Accessories: DOLLARS ARE DOWN 3%. UNITS ARE DOWN 3%. THE AVERAGE PRICE IS UP 1%.
- ◇ Apparel: (LARGEST CATEGORY): DOLLARS DOWN 9%. UNITS ARE DOWN 6%. THE AVERAGE PRICE IS DOWN 3%.
- ◇ Equipment: DOLLARS ARE UP 1%. UNITS ARE DOWN 3%. THE AVERAGE PRICE IS UP 4%.

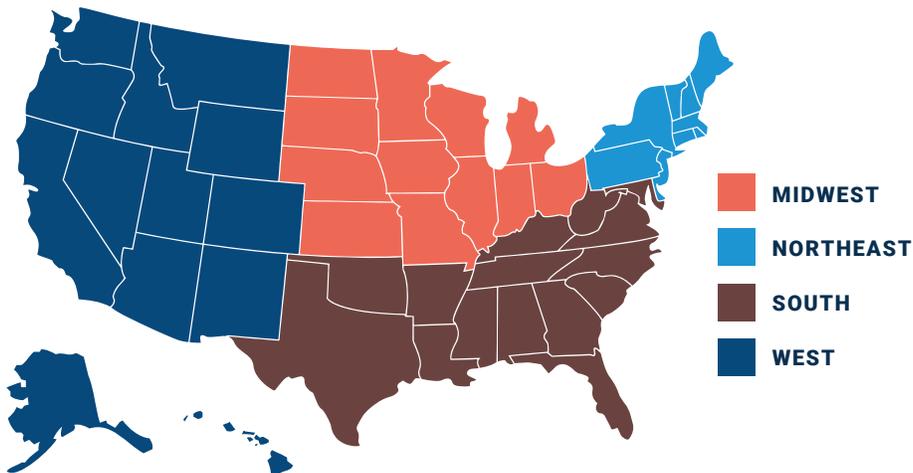


WEST

- + "The customers started coming in the minute it started snowing. Consumers seem to be ready to spend money."
- "People are using online a lot these days, but we are finding they still like to come to a shop to touch and feel the products."

MIDWEST

- + "Sales of Alpine and Cross-country hardgoods are strong"
- "The retail sales window is getting smaller. Retailers and suppliers need to work better together in planning for the shorter season and keeping the supply chain moving. Some suppliers are shipping so slowly we will discontinue doing business with them in the future unless they change."



SOUTH

- + "We have had a pretty good year in ski boots and snowboard hardgoods."
- "We have not seen ski specific clothing start off very well but it is a bit early for us."

NORTHEAST

- + "Hard good sales have been reasonably good with a 6% growth over last year, strong areas are boot sales 16% increase and season rentals 6% up."
- "It's crazy hard to find good staff."



- "PRICES ARE TOO HIGH ESPECIALLY FOR APPAREL."
- "WE WATCH PRICES."
- "MORE INFORMATION IS AVAILABLE ONLINE."
- "WE CARE THAT A BRAND REPRESENTS OUR VALUES."

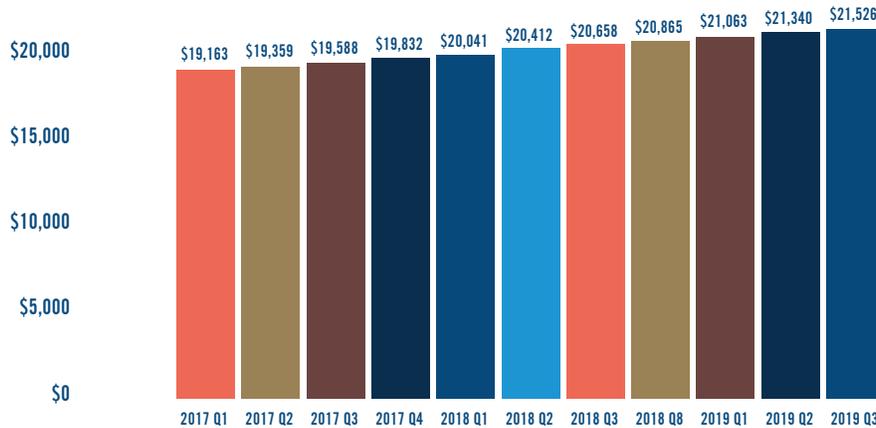


GROSS DOMESTIC PRODUCT³

MARKET DATA



THE GDP GROWTH RATE MEASURES HOW FAST THE ECONOMY IS GROWING AND IS THE MOST IMPORTANT INDICATOR OF ECONOMIC HEALTH. THE GDP GROWTH RATE IS DRIVEN BY FOUR COMPONENTS: PERSONAL CONSUMPTION, BUSINESS INVESTMENT, GOVERNMENT SPENDING, AND NET EXPORTS. THE MAIN DRIVER OF GDP GROWTH IS PERSONAL CONSUMPTION. THIS INCLUDES THE CRITICAL SECTOR OF RETAIL SALES.⁴

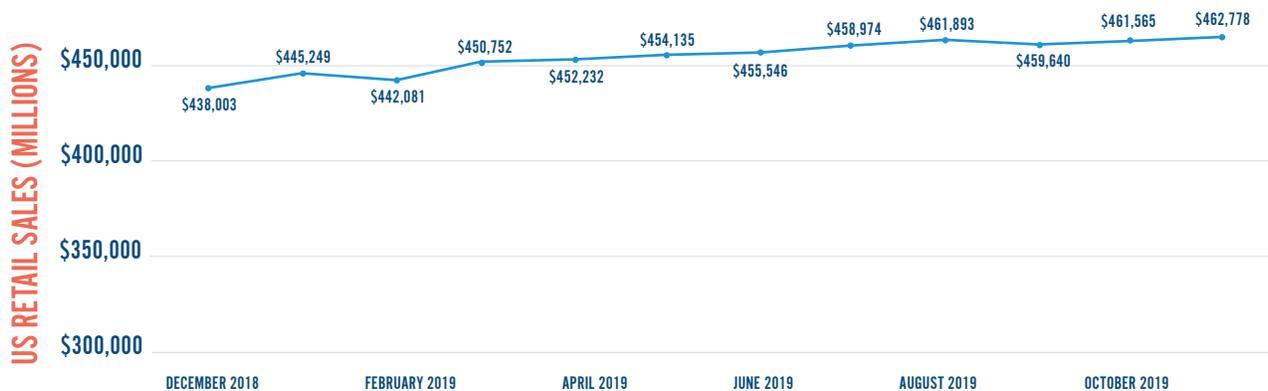


US RETAIL SALES⁵

MARKET DATA



THE U.S. RETAIL SALES REPORT, PUBLISHED MONTHLY BY THE U.S. CENSUS BUREAU, IS A MONTHLY MEASUREMENT OF THE U.S. RETAIL INDUSTRY. RETAIL SALES ARE USED TO PREDICT CONSUMER SPENDING TRENDS AND ARE A TIMELY MEASUREMENT OF ECONOMIC HEALTH.⁶



³ <https://www.bea.gov/data/gdp/gross-domestic-product#gdp>, accessed December 2019
⁴ <https://www.thebalance.com>, accessed December 2019
⁵ <https://www.census.gov/retail/index.html>, accessed December 2019
⁶ <https://www.thebalance.com>, accessed December 2019



SIA MONTHLY RETAIL REPORTS

FROM NOVEMBER THROUGH MAY, SIA, IN PARTNERSHIP WITH THE NPD GROUP, WILL BE PROVIDING TOP LINE SNOW SPORTS RETAIL DATA THAT INCLUDES ALPINE, NORDIC, SNOWBOARD AND OUTERWEAR AND SPANS SNOW SPECIALTY, SNOW CHAIN AND SNOW INTERNET – COLLECTIVELY CALLED THE **SIA US SNOW INDUSTRY RETAIL MARKET REPORT**. THESE REPORTS ARE ONLY AVAILABLE TO SIA PREMIUM, STANDARD AND RETAILER/REP MEMBERS. REPORTS WILL BE ISSUED ON/AROUND THE SECOND THURSDAY OF EACH MONTH AND WILL LINK TO A MONTHLY RECORDING THAT HELPS YOU NAVIGATE EACH TOP LINE RETAIL REPORT.

IN ADDITION, IN AN EFFORT TO HELP PROVIDE ADDITIONAL CONTEXT TO THE RETAIL DATA, SIA WILL PRODUCE THE “SIA RETAIL WRAP-UP” THAT WILL FEATURE HIGHLIGHTS FROM THE SNOW INDUSTRY RETAIL MARKET REPORT, GENERAL MARKET INDICATORS, AND (WHERE APPLICABLE) RELEVANT INSIGHTS FROM OUR MONTHLY RETAIL PULSE SURVEYS. THROUGH THESE SURVEYS, SIA IS ENGAGING WITH RETAILERS AND CONSUMERS TO GET A “PULSE” FROM PEOPLE CLOSE TO THE ACTION. INSIGHTS ARE ENHANCED BY THE NUMBER OF CONTRIBUTORS. THEREFORE, WE WELCOME YOUR CONTINUED SUPPORT AND PARTICIPATION!

Contacts

FOR SIA MEMBERSHIP QUESTIONS, MONTHLY RETAIL PULSE SURVEY PARTICIPATION AND/OR ADDITIONAL SIA REPORTS, PLEASE CALL COLIN EDWARDS 435.659.3713 OR EMAIL AT CEDWARDS@SNOWSPORTS.ORG

FOR QUESTIONS ON NPD RETAIL DATA OR OTHER NPD REPORTS, PLEASE REACH OUT TO JULIA DAY 303.402.5611 OR JULIA.DAY@NPD.COM

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