

END OF SEASON 2023-2024 (AND A LOOK AHEAD AT 2024-2025)

A REPORT OF SURVEY FINDINGS FROM ENTHUSIAST PARTICIPANTS



CONTENTS

Background	<u>3</u>
Project Overview and Respondent Profile	
.....	
Key Takeaways from Snowsports Enthusiasts	<u>7</u>
Key Metrics and Implications	
.....	
Detailed Results	<u>14</u>
Snowsports Activities	
.....	
Detailed Results	<u>24</u>
Expenditures	
.....	
Detailed Results	<u>36</u>
Sustainable Gear	
.....	
Detailed Results	<u>43</u>
Weather Impacts	
.....	
Detailed Results	<u>52</u>
Looking Ahead	
.....	
Appendix	<u>62</u>
Methodology and Additional Resources	
.....	



BACKGROUND

OVERVIEW

This research, conducted via online survey among SIA's panel of Snowsports Enthusiasts, is designed to help SIA members keep informed about changes in snowsports consumer behaviors.

Topics include:

- Participation
- Expectations vs. reality for the 2023-24 season
- Expenditures
- Weather impacts on the 2023-24 season
- Expectations for the 2024-25 season

Findings from the April 2024 survey are compared to those from April 2023 and April 2022, where applicable, to understand how sentiment, expectations, and experiences have changed over time.

RESPONDENT DEMOGRAPHICS

	April '22	April '23	April '24
Age			
<45	23%	21%	16%
45-64	49%	49%	46%
65+	28%	30%	39%
Gender			
Male	74%	68%	74%
Female	25%	32%	26%
Prefer to self-describe	1%	0%	1%
Sexual Orientation			
Heterosexual	96%	96%	97%
LGBTQ+	4%	4%	3%
Marital Status			
Married/Living with Partner	73%	75%	74%
Single/Never Been Married	18%	16%	15%
Separated/Divorced	7%	8%	9%
Widowed	2%	1%	2%
Children in Household			
Yes	19%	21%	18%
No	81%	79%	82%
Region			
Northeast	38%	53%	55%
West	46%	33%	35%
Other	15%	14%	10%

	April '22	April '23	April '24
Ethnicity			
White/Caucasian	94%	93%	94%
Asian	5%	4%	2%
Hispanic, Latino/Latina, or Spanish origin (any race)	2%	3%	2%
Black/African American	1%	1%	1%
American Indian or Alaskan Native	1%	1%	1%
Native Hawaiian or Other Pacific Islander	0%	1%	2%
Other	2%	2%	2%
Household Income			
\$0 to \$49,999	9%	10%	7%
\$50,000 to 99,999	25%	23%	23%
\$100,000 to \$149,999	27%	24%	23%
\$150,000 to \$199,999	17%	18%	18%
\$200,000 or greater	22%	25%	30%
Participant Type			
Social skier/boarder/biker/other	51%	45%	46%
Health conscious	55%	40%	41%
Family/parent	35%	29%	27%
Aspirational/lifestyle	49%	48%	65%
Solo skier/boarder/biker/other	35%	33%	38%
Vacationer	36%	27%	26%
Hard core	44%	36%	43%
Casual/infrequent/fair-weather skier/boarder/biker/other	14%	10%	10%
Competitor/Athlete	15%	11%	10%
Beginner	2%	2%	1%
Non-participant/Purchaser-only	0%	1%	0%
Other	11%	8%	11%

RESPONDENT ACTIVITY PROFILE

This table summarizes the profile of survey respondents.

When interpreting the results of this study, it is important to consider that this is *not* a random sample of all snowsports participants. Instead, **these data represent the opinions of individuals who are engaged enough in the sport to either attend snowsports expos or to be interested in communications from SIA.**

Throughout this report, we refer to these respondents as “Enthusiasts” in order to distinguish between this group of respondents and all snowsports participants as a whole.

	April '22	April '23	April '24
Percentage Participating Over the Last 12 Months			
Resort - Skiing	83%	82%	84%
Winter running/hiking	43%	34%	33%
Snowshoeing	39%	21%	22%
Sledding	23%	15%	14%
Cross-country skiing	28%	19%	17%
Resort - Snowboarding	26%	17%	14%
Backcountry - AT	17%	14%	14%
Resort - Uphill	19%	12%	14%
Snowmobiling	11%	7%	4%
Resort - Telemark	9%	5%	6%
Backcountry - Snowboard	7%	3%	3%
Fat bicycling	5%	4%	4%
Backcountry - Telemark	5%	3%	4%
Ice climbing	2%	1%	1%



KEY TAKEAWAYS FROM SNOWSPORTS ENTHUSIASTS

SNOWSPORTS PARTICIPATION

Snowsports Activities

2020-21 vs. 2021-22 vs. 2022-23 Participation

(all levels of participation included – activities with the most participants shown)

	 Resort Skiing	 Winter Running/Hiking	 Snowshoeing	 Cross-Country Skiing	 Resort Snowboarding
April 2022	83%	43%	39%	28%	26%
April 2023	82%	34%	21%	19%	17%
April 2024	84%	33%	22%	17%	14%

Participation in specific snowsports generally remained steady from the 2022-23 season to 2023-24. While snowshoeing saw a negligible decrease, resort skiing, winter running and hiking, cross-country skiing, and resort snowboarding all remained relatively steady.

SNOWSPORTS PURCHASES

Percent Making Snowsports Purchases

Expectations vs. Actual Purchases

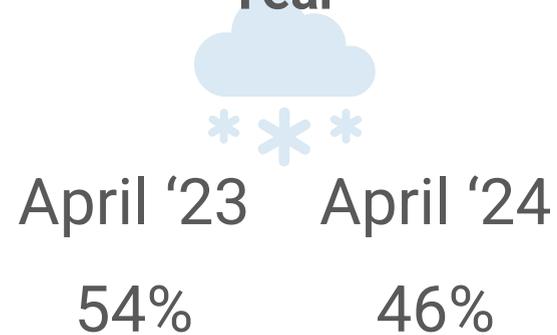
(among snowsports Enthusiasts)

	Apparel 	Accessories 	Ski Area Season Pass(es) 	Ski Area Lift Ticket(s) 	Gear Services 	Gear purchases 
April 2023 Expected to purchase	46%	39%	70%	42%	45%	41%
April 2024 Reported purchasing	53%	40%	62%	35%	41%	46%

Enthusiasts underestimated their purchasing of apparel going into the 2023-24 season. However, Enthusiasts purchased similar to what they expected for accessories and services for their gear. Enthusiasts overestimates their purchasing for ski area season passes.

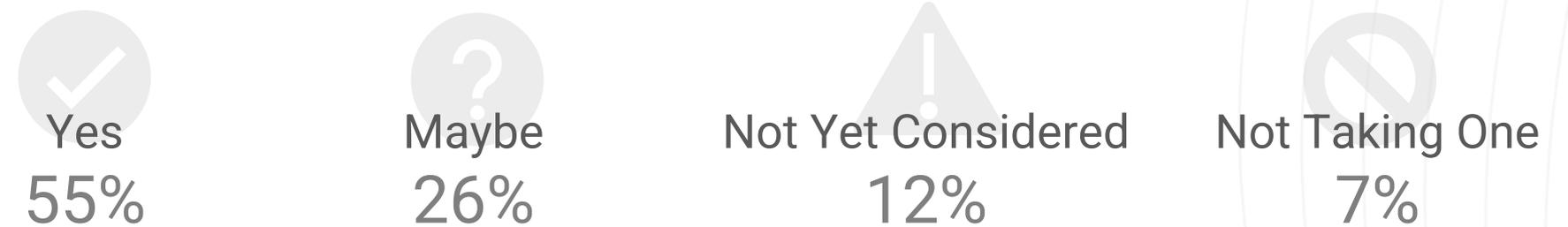
EXCITEMENT AND VACATION PLANS

Excited for Snowsports Next Year



Excitement for the coming season (2024-25) decreased compared to excitement for the 2022-23 season last April. While more than half of Enthusiasts (54%) noted being excited for the 2023-24 season last April, under half (46%) felt the same this year going into the 2024-25 season.

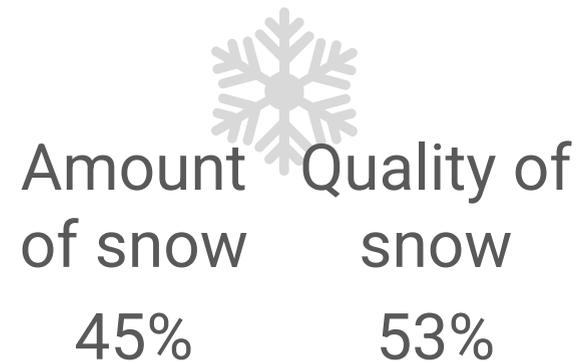
Snowsports-Focused Vacation Plans for the 2024-25 Season



Despite lower levels of excitement, interest in travel is still strong. In April 2024, when looking ahead to the 2024-25 season, more than half of Enthusiasts (55%) reported plans to take a snowsports-focused vacation in the next season. This is consistent with the previous year (not shown).

SUSTAINABLE GEAR AND WEATHER IMPACTS

Snowfall Ratings for the 2023-2024 Season*



*% rated good, very good, or excellent

Over half of Enthusiasts said the quality of snow this season was good, very good or excellent, while 45% said the same about the amount. More Enthusiasts in the West said the amount of snow *and* the quality of snow was good or better (77% and 78%) compared to those in the Northeast (31% and 44%).

Sustainability in Gear and Snowsports Products



The majority of Enthusiasts said it was at least a little important to them that their gear be sustainably made, but a smaller proportion shopped based on sustainability and bought sustainably made products. Most Enthusiasts said it was important that gear be made sustainably, but about two in five Enthusiasts purchased a less sustainably made product this season because of the cost, or because the brand they wanted didn't offer a more sustainable product. About one third shopped based on sustainability.



DETAILED RESULTS

REPORTING NOTES

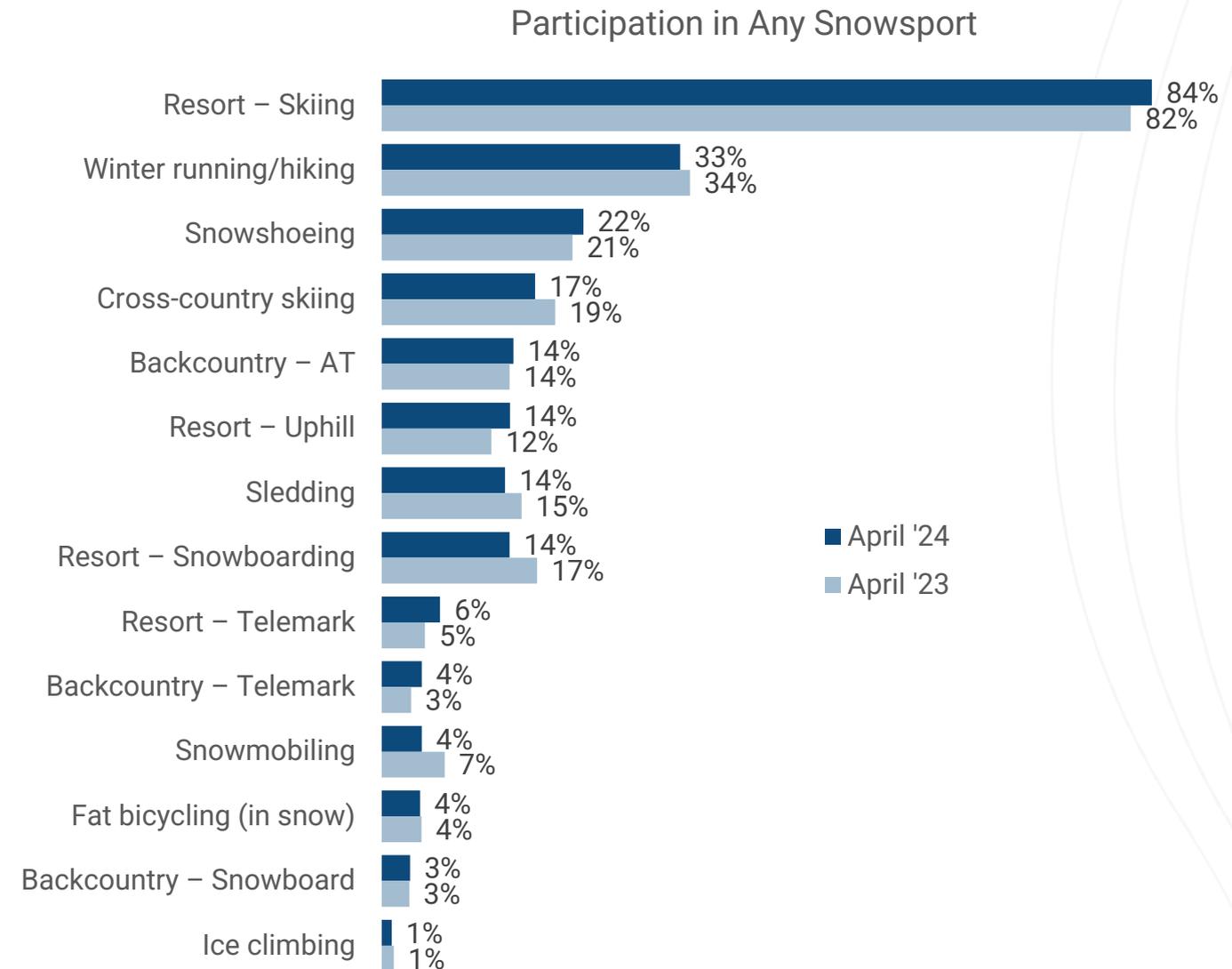
When interpreting the results of this study, it is important to consider that this is *not* a random survey of all snowsports participants. Instead, these data represent the opinions of individuals who are engaged enough in the sport to either attend snowsports expos or to be interested in communications from SIA.

Throughout this report, we refer to these respondents as “Snowsports Enthusiasts” in order to distinguish between this group of respondents and all snowsports participants as a whole.

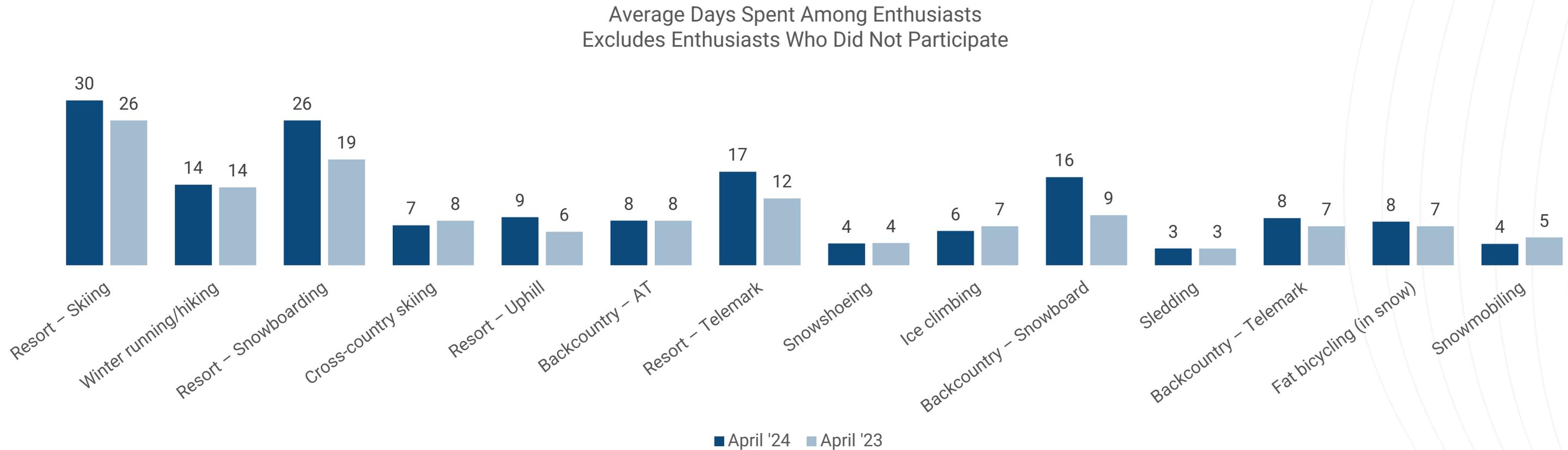
SNOWSPORTS ACTIVITIES

Participation in most snowsports remained steady or increased, with some notable exceptions.

- Winter running/hiking, cross-country skiing, sledding and snowmobiling saw slight decreases in participation from 2023 to 2024.
- Resort skiing, snowshoeing, uphill at resorts, and telemark skiing (resort and backcountry) all saw slight increases in participation among Enthusiasts this year.



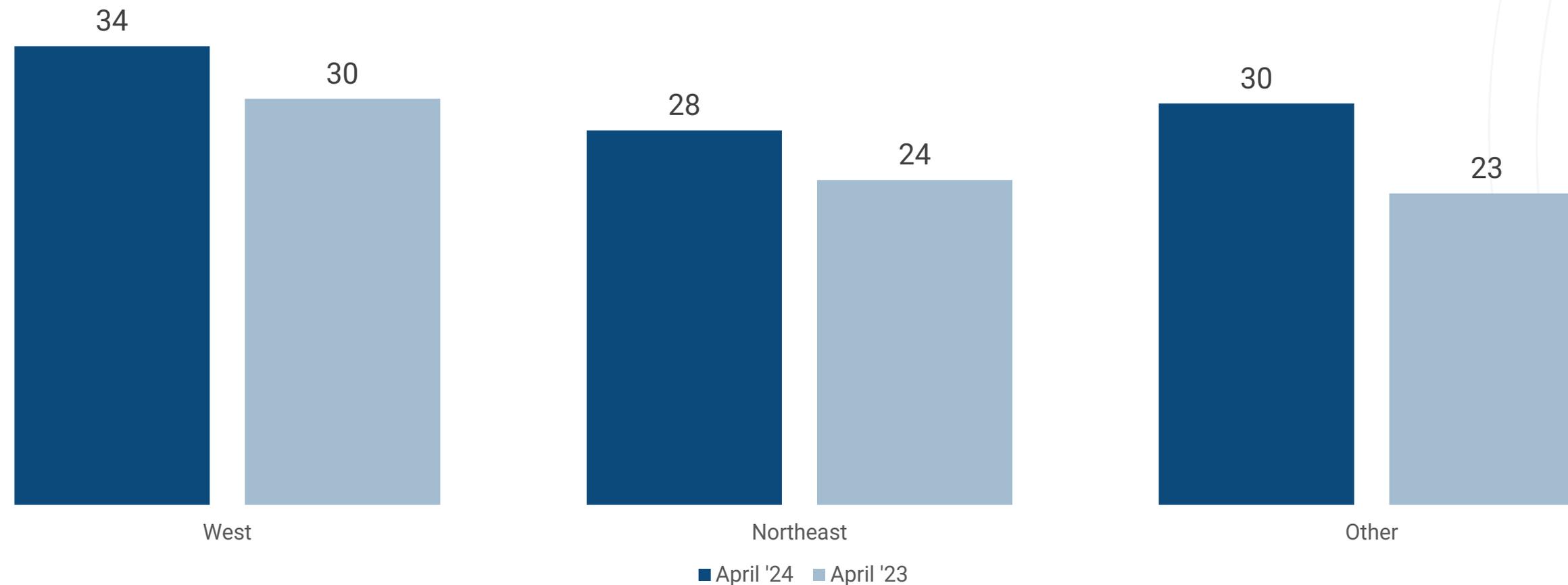
The average number of days spent resort skiing remained relatively steady among Enthusiasts who participated.



The average number of days that Enthusiasts reported participating in resort skiing remained relatively steady from April 2023 to April 2024. While fewer Enthusiasts reported resort snowboarding, the average number of days they spent participating increased.

Participation in resort skiing increased across all regions from 2023 to 2024.

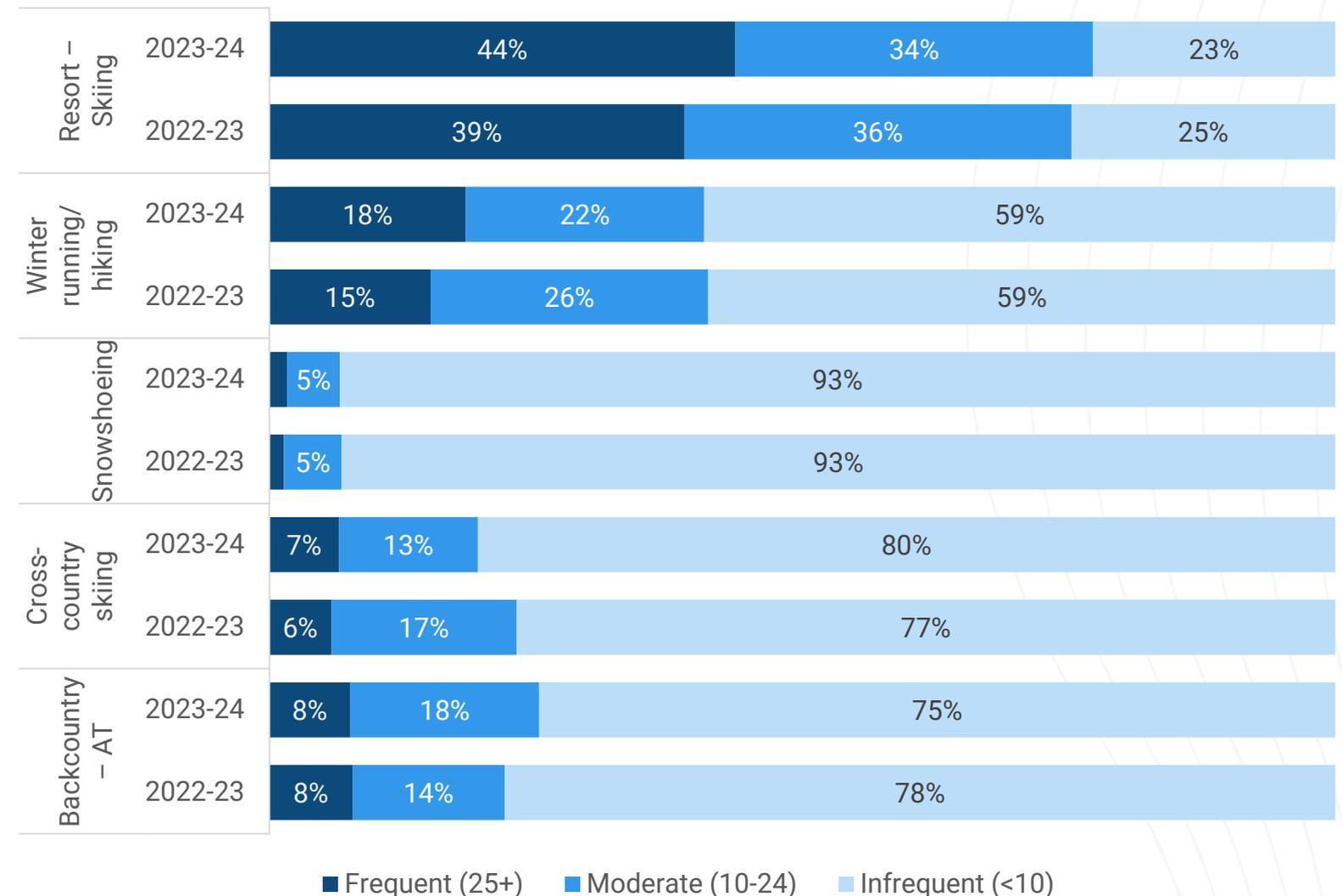
Average Days Resort Skiing Over Last 12 Months by Region
Excludes Enthusiasts Who Did Not Participate



Enthusiasts skied and ran/hiked slightly more frequently this winter compared to the 2022-2023 season.

- A greater proportion of those that participated in resort skiing this year did so frequently (25 days or more) compared to last season.
- While a smaller share of Enthusiasts reported participating in winter running/hiking this year compared the 2022-2023 season, a greater share of winter runners/hikers participated frequently (25 days or more).
- *Not shown:*
 - Enthusiasts ages 65 or older were more likely to report frequent resort skiing (51%) than those under the age of 45 (37%).
 - Those without kids in their home (47%) were more likely to ski frequently than those with kids (29%).

Frequency of Snowsports Participation among Participants
Activities with Most Participants in 2023-24 Shown



Winter running/hiking and snowshoeing were common additional activities among Enthusiast resort skiers.

This table examines crossover activities. To interpret it correctly, the column shows the base activity while the rows show the additional activities they participated in. For instance, among those who went skiing at a resort, 32% also went winter running/hiking, 22% went snowshoeing, and 16% cross-country skiing.

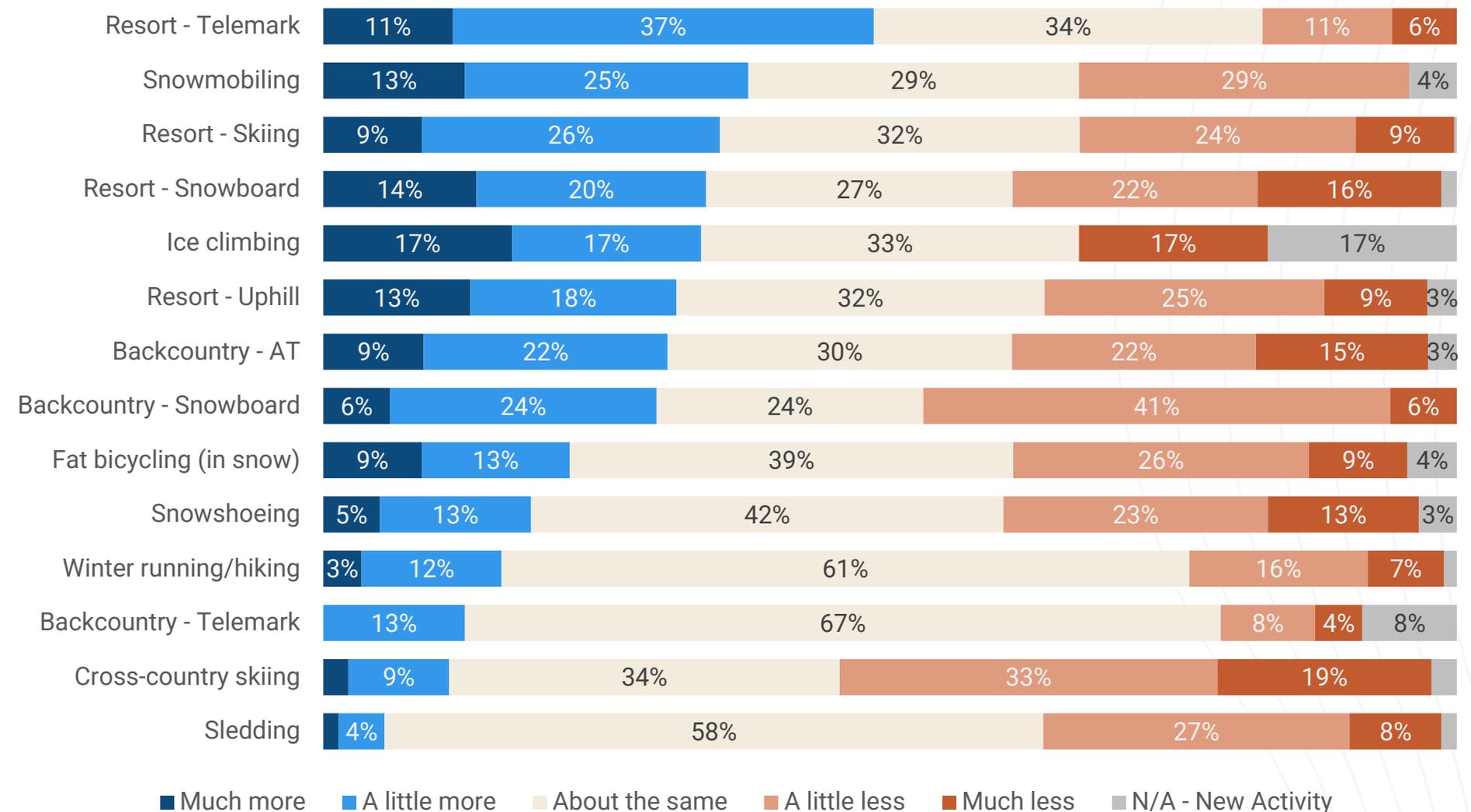
Additional Participated Activities	Total	Participated in Activity													
		Resort – Skiing	Resort – Snowboard	Resort – Telemark	Backcountry AT	Backcountry Snowboard	Backcountry Telemark	Snowmobiling	Cross-country skiing	Resort – Uphill	Snowshoeing	Winter running/hiking	Sledding	Fat bicycling (in snow)	Ice climbing
Resort – Skiing	84%	100%	32%	77%	91%	24%	67%	75%	82%	82%	85%	83%	82%	74%	67%
Resort – Snowboarding	14%	5%	100%	14%	14%	88%	13%	38%	12%	14%	12%	17%	19%	35%	33%
Resort – Telemark	6%	6%	7%	100%	14%	6%	63%	13%	14%	19%	7%	8%	12%	9%	33%
Backcountry – AT	14%	16%	15%	31%	100%	29%	50%	33%	24%	47%	17%	24%	22%	30%	50%
Backcountry – Snowboard	3%	1%	20%	3%	6%	100%	4%	17%	2%	6%	1%	3%	7%	13%	33%
Backcountry – Telemark	4%	3%	4%	43%	15%	6%	100%	13%	13%	17%	7%	7%	11%	4%	33%
Snowmobiling	4%	4%	12%	9%	10%	24%	13%	100%	4%	5%	6%	4%	5%	22%	33%
Cross-country skiing	17%	16%	15%	37%	28%	12%	50%	17%	100%	27%	33%	26%	20%	39%	33%
Resort – Uphill	14%	14%	15%	43%	46%	29%	54%	17%	23%	100%	19%	21%	22%	30%	33%
Snowshoeing	22%	22%	20%	23%	27%	6%	33%	29%	43%	30%	100%	35%	36%	39%	33%
Winter running/hiking	33%	32%	41%	40%	54%	35%	50%	33%	50%	48%	52%	100%	54%	48%	100%
Sledding	14%	13%	19%	26%	20%	29%	33%	17%	16%	21%	22%	22%	100%	17%	50%
Fat bicycling (in snow)	4%	4%	11%	6%	9%	18%	4%	21%	10%	9%	7%	6%	5%	100%	17%
Ice climbing	1%	1%	3%	6%	4%	12%	8%	8%	2%	3%	2%	3%	4%	4%	100%

Darker shades indicate larger numbers in each row.

Over a third of Enthusiasts skied and/or snowboarded at resorts more this season.

2023-24 Perceived Participation Compared to 2022-23

- When asked to compare participation to the previous season, 35% of those that reported skiing at a resort this season and 34% of those that reported snowboarding said they participated more than they did in the 2022-23 season.
- Nearly half of telemark skiers (48%) said they participated more this year compared to last.
- Backcountry snowboarding and cross-country skiing saw that largest decreases in participation (47% and 52% saying they participated less, respectively).

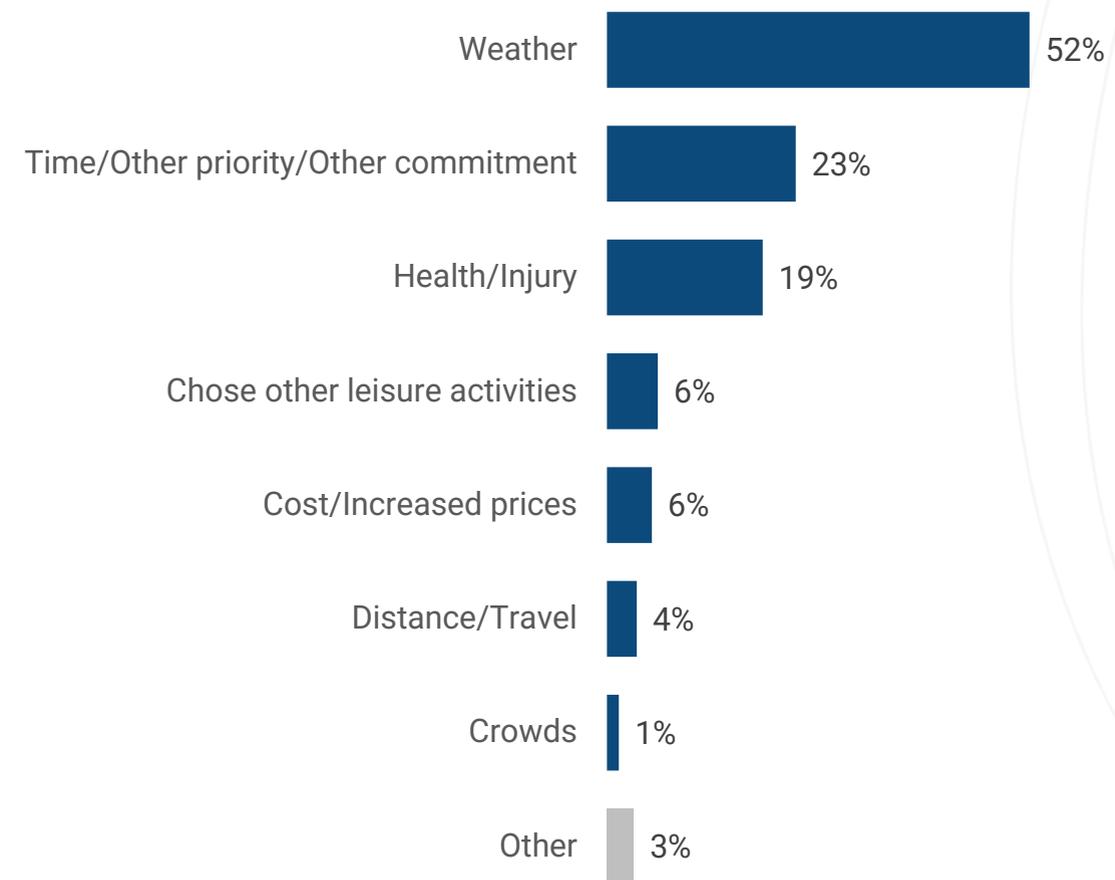


Over half of Enthusiasts cited the weather as the primary reason they participated less.

Enthusiasts who participated less in any snowsports activity this season were asked why they participated less. Their responses were coded thematically, and verbatim responses can be found in the accompanying data tables.

- It was more common for Enthusiasts this season to cite weather as a reason they participated less compared to 2023 (37% compared to 52%).
 - *Not Shown:* Enthusiasts in the Northeast more likely than those in the West to say that weather impacted their participation this season (59% compared to 33%).

Reasons for Participating Less in Any Winter Activity

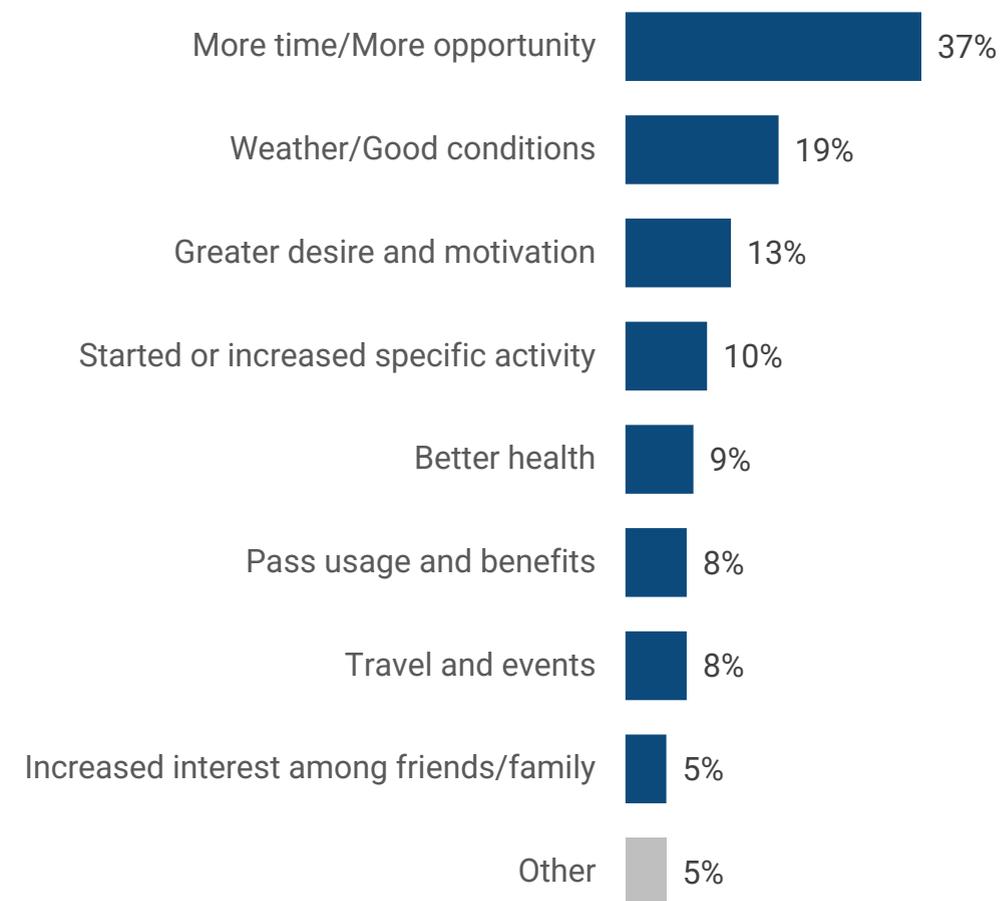


Over one third of Enthusiasts that participated more noted that they had more time and/or opportunities to do so.

Enthusiasts who participated more in any snowsports activity this season were asked why they participated more. Their responses were coded thematically, and verbatim responses can be found in the accompanying data tables.

- Over one third of Enthusiasts who participated more (37%) noted opportunity and time as a factor in their more frequent participation compared to last season.
- Other common reasons for participating more included weather conditions (19%), greater desire/motivation (13%), and increases in a particular activity (10%).

Reasons for Participating More in Any Winter Activity



Only a few Enthusiasts reported participating in a new activity this winter season.

Enthusiasts who participated in a new activity this season were asked why they started a new activity. Due to a small number of responses (n=17), responses were not coded. Rather, select quotes are shown at right.



“On the East Coast backcountry skiing can be challenging with weather. Winter Hiking with Micro Spikes is a good alternative to get outside and still exercise.”

“Change of activities on a less-than-ideal snow year.”

“Kids were involved in it (XC skiing), so I gave it a try and loved it.”

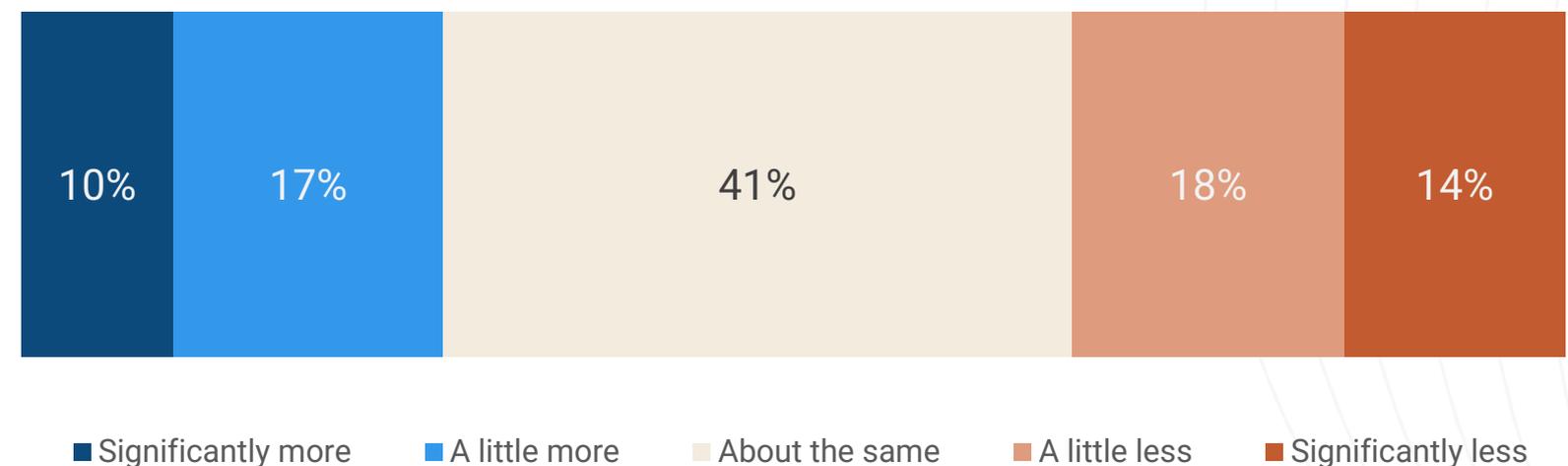
“I was able to borrow a fat bike.”

EXPENDITURES

Nearly one third of Enthusiasts said they purchased less gear than they did last year.

- About two fifths of Enthusiasts (41%) said they purchased the same amount of snowsports-related gear and apparel as last year.
- More than a quarter (27%) said they purchased more.
- *Not Shown:*
 - Younger Enthusiasts (under 45 years old) purchased more snowsports gear and apparel this season than older age groups – 37% of those under 45 purchased more gear this season compared to 25% of ages 45-64 and 26% of 65 and older.

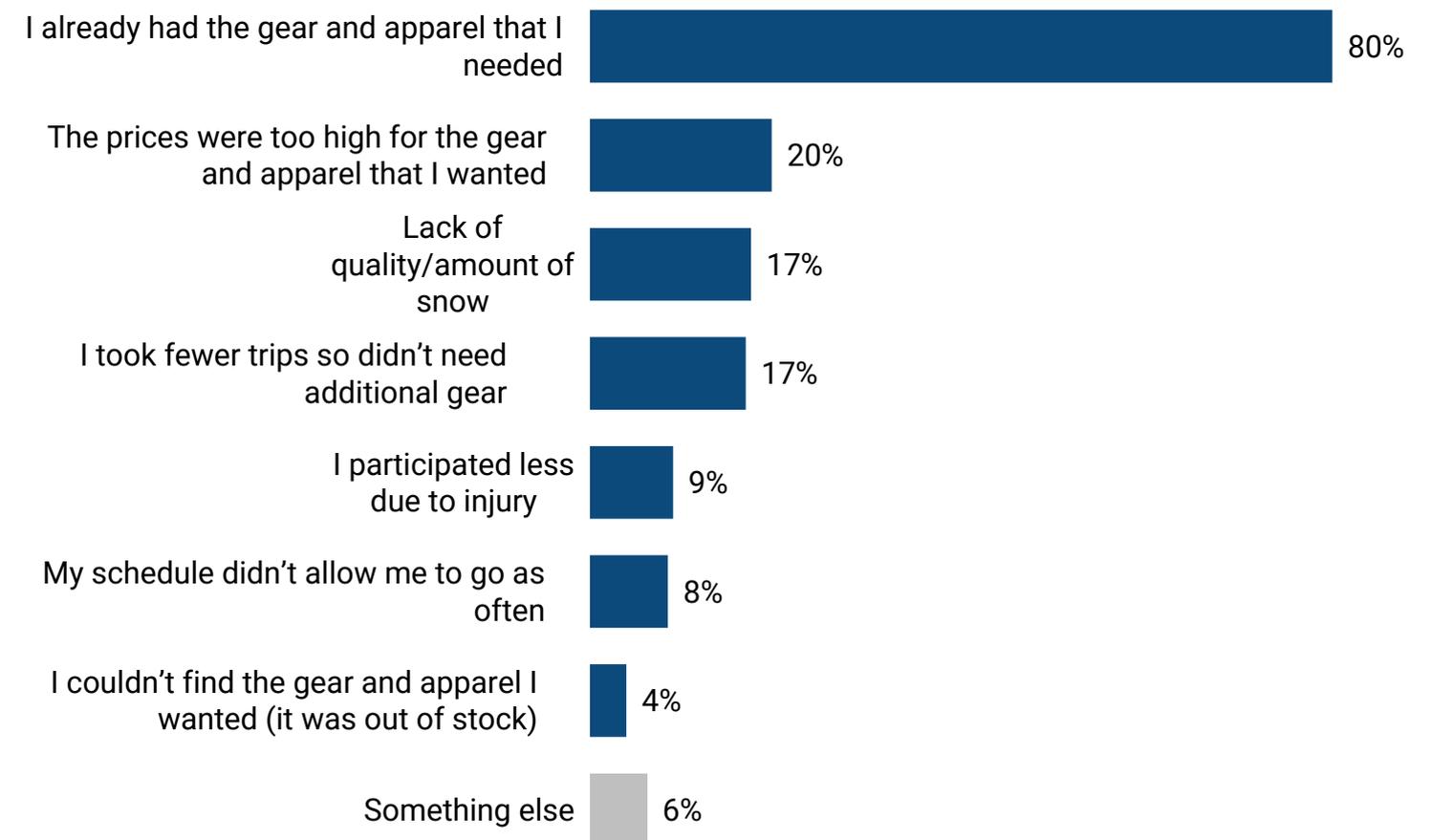
Amount of Snowsports-Related Gear and Apparel Purchased in 2023-24 Compared to 2022-23



The majority of Enthusiasts said they purchased less gear and apparel this season because they already had what they needed.

- Four in five Enthusiasts (80%) said they purchased less gear and apparel this winter season because they already had what they needed.
- One in five (20%) said they purchased less because the prices were too high for the items they wanted.
- *Not Shown:*
 - Younger Enthusiasts (under 45) were more likely than older age groups to say that they purchased less because the prices were too high (26%).

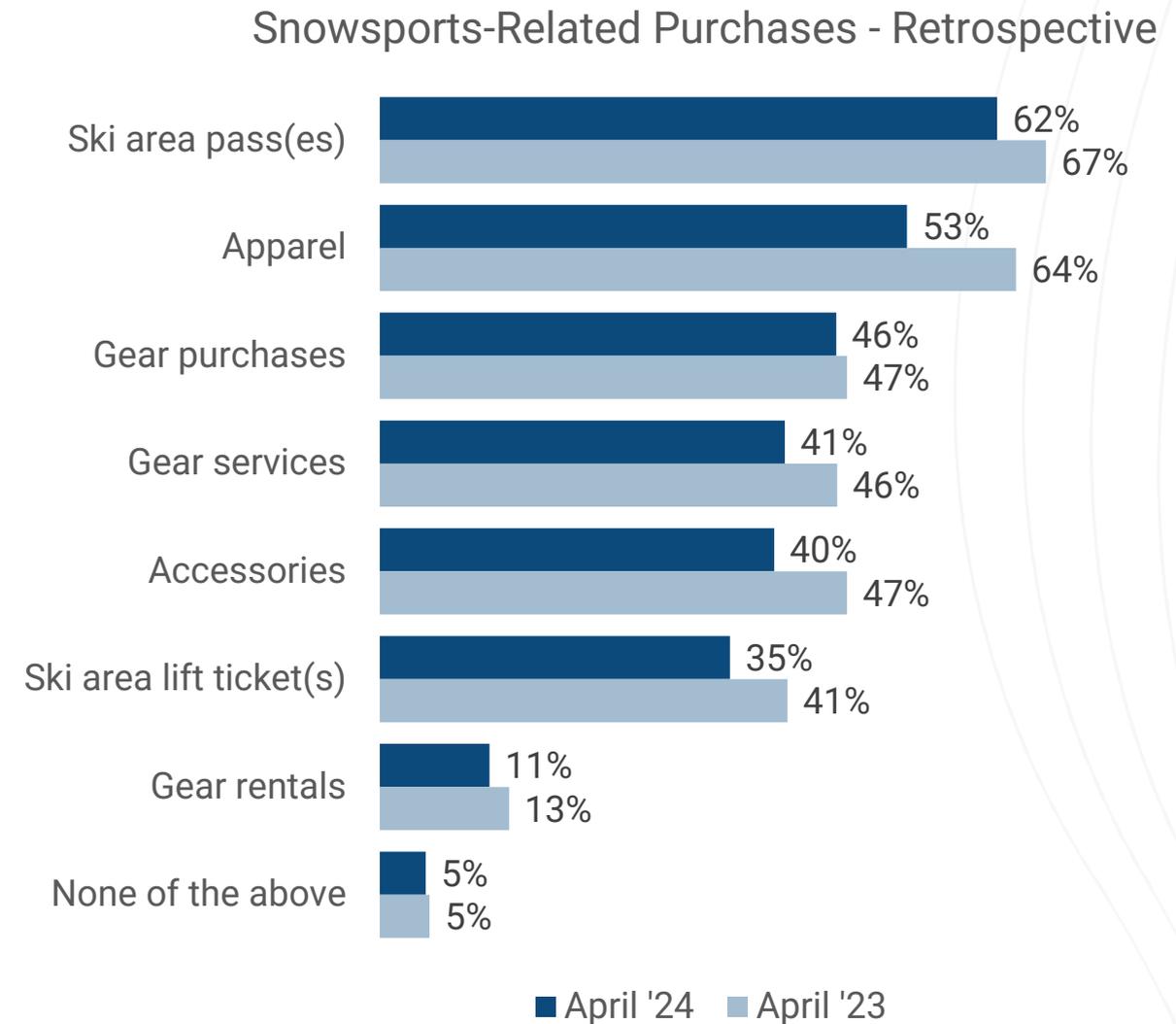
Reasons for Purchasing Less Gear and Apparel in 2023-24



Enthusiasts purchased less of every snowsport-related product compared to last year.

In April 2023 and in April 2024, Enthusiasts were asked to retrospectively report any snowsports-related purchases they made during the current season.

- Over half of Enthusiasts purchased ski passes and apparel this season (62% and 53%, respectively), but this still marked a decrease from the 2022-2023 season, where a greater proportion of people bought passes and apparel (67% and 64% respectively).
- Gear purchases remained relatively steady from 2022-2023 to 2023-2024.
- *Not Shown:*
 - Younger Enthusiasts (under 45 years old) made more gear and apparel purchases than Enthusiasts 65 and older (53% and 62% compared to 40% and 48%).

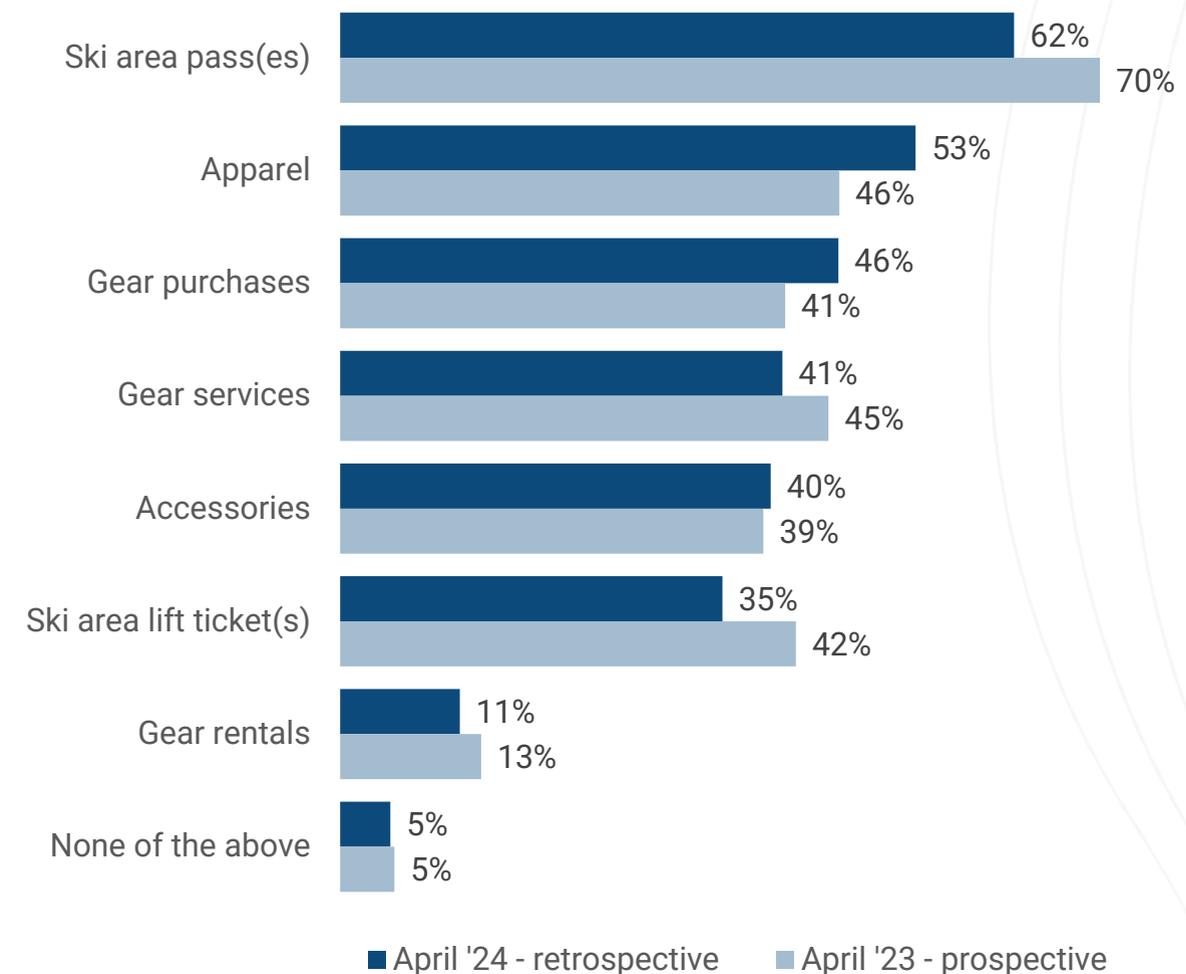


Enthusiasts purchased more apparel and gear in the 2023-24 season than they anticipated.

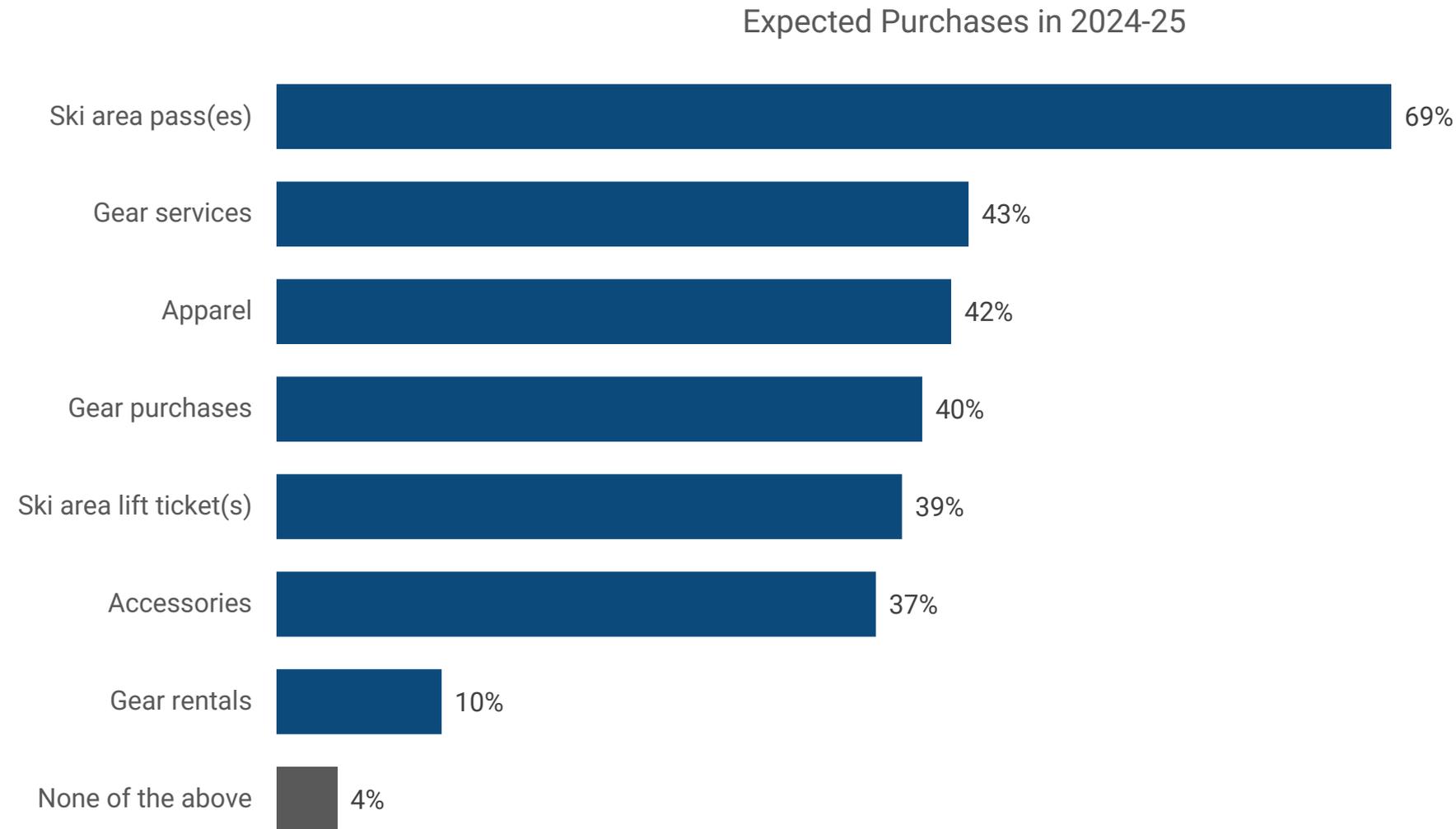
In April 2023, Enthusiasts were asked to prospectively report snowsports-related purchases they expected to make in the 2023-24 season. Results are compared to what Enthusiasts reported purchasing during the 2023-24 season in April 2024.

- Enthusiasts purchased more apparel in the 2023-24 season (53%) than they anticipated in April 2023 (46%).
- They also purchased more gear in the 2023-2024 season (46%) than they anticipated last year (41%).
- However, fewer Enthusiasts purchased ski area passes, gear services and lift tickets than they expected to in April 2023.

Anticipated Purchases Compared to Actual Purchases



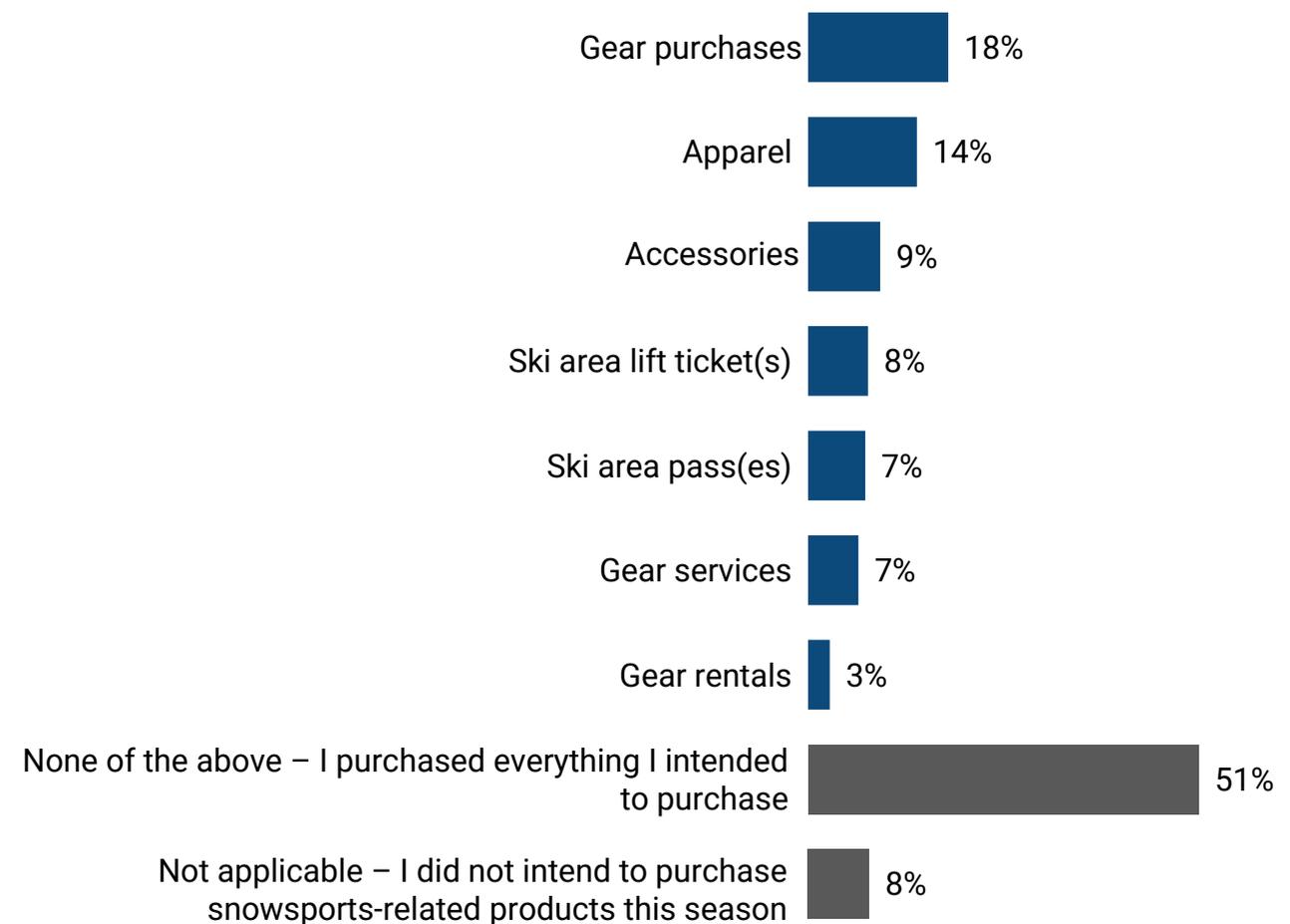
Over three fifths of Enthusiasts expect to purchase ski passes next season.



Over half of Enthusiasts purchased everything they intended to in the 2023-2024 season.

- Over half of Enthusiasts (51%) purchased everything they intended to during this winter season. This proportion was even greater among Enthusiasts with an annual household income above \$150k (54%) and frequent skiers (56%) (not shown).
- Nearly one in five Enthusiasts (18%) intended to purchase gear during the 2023-2024 season but did not.

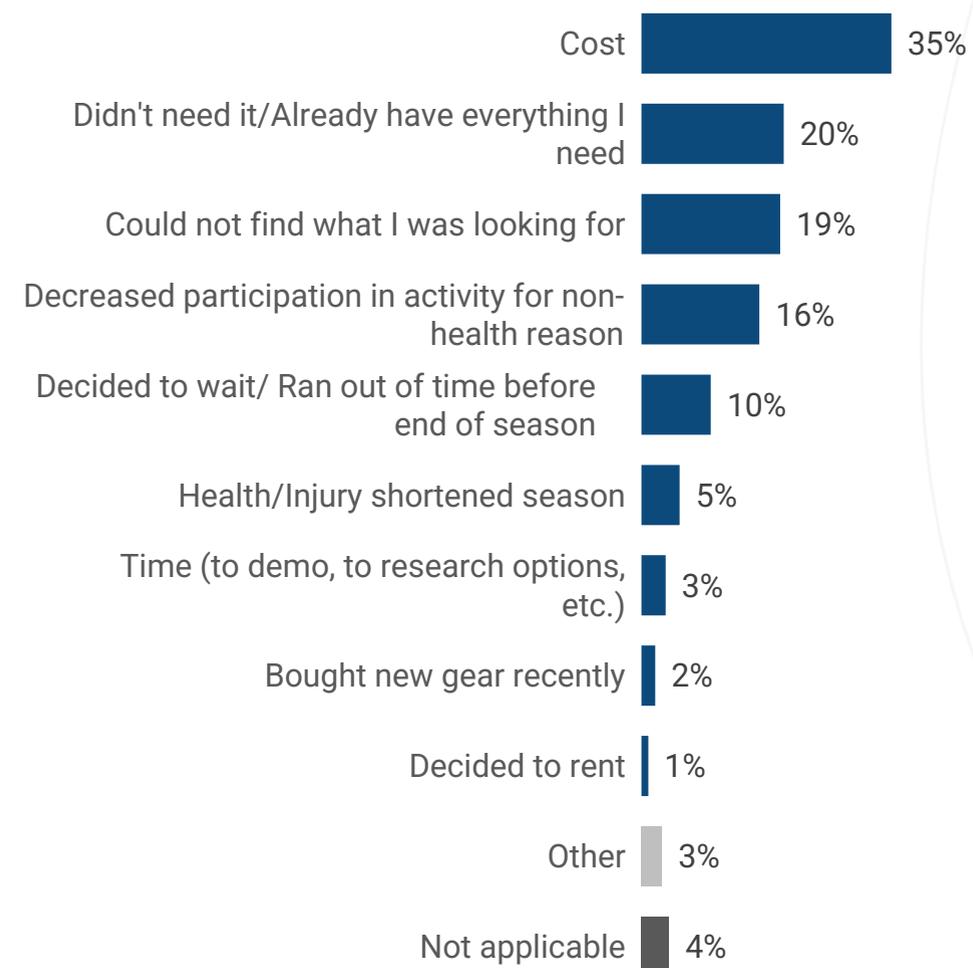
Products Intended to Purchase but Ended Up NOT Purchasing in 2023-24



Over a third of Enthusiasts didn't purchase the gear they intended to because of cost.

- Over a third of Enthusiasts (35%) did not purchase the gear they intended to because of the cost. This proportion was greater among Enthusiasts with kids (47%), those with an annual household income under \$100k (47%), and Enthusiasts under 45 years old (49%) (not shown).
- One in five Enthusiasts didn't purchase the gear they intended to because they did not need it or already had what they needed.
- Nearly one in five Enthusiasts (19%) didn't purchase gear because they couldn't find what they were looking for.
- Only 1% of Enthusiasts opted to rent instead of purchasing gear.

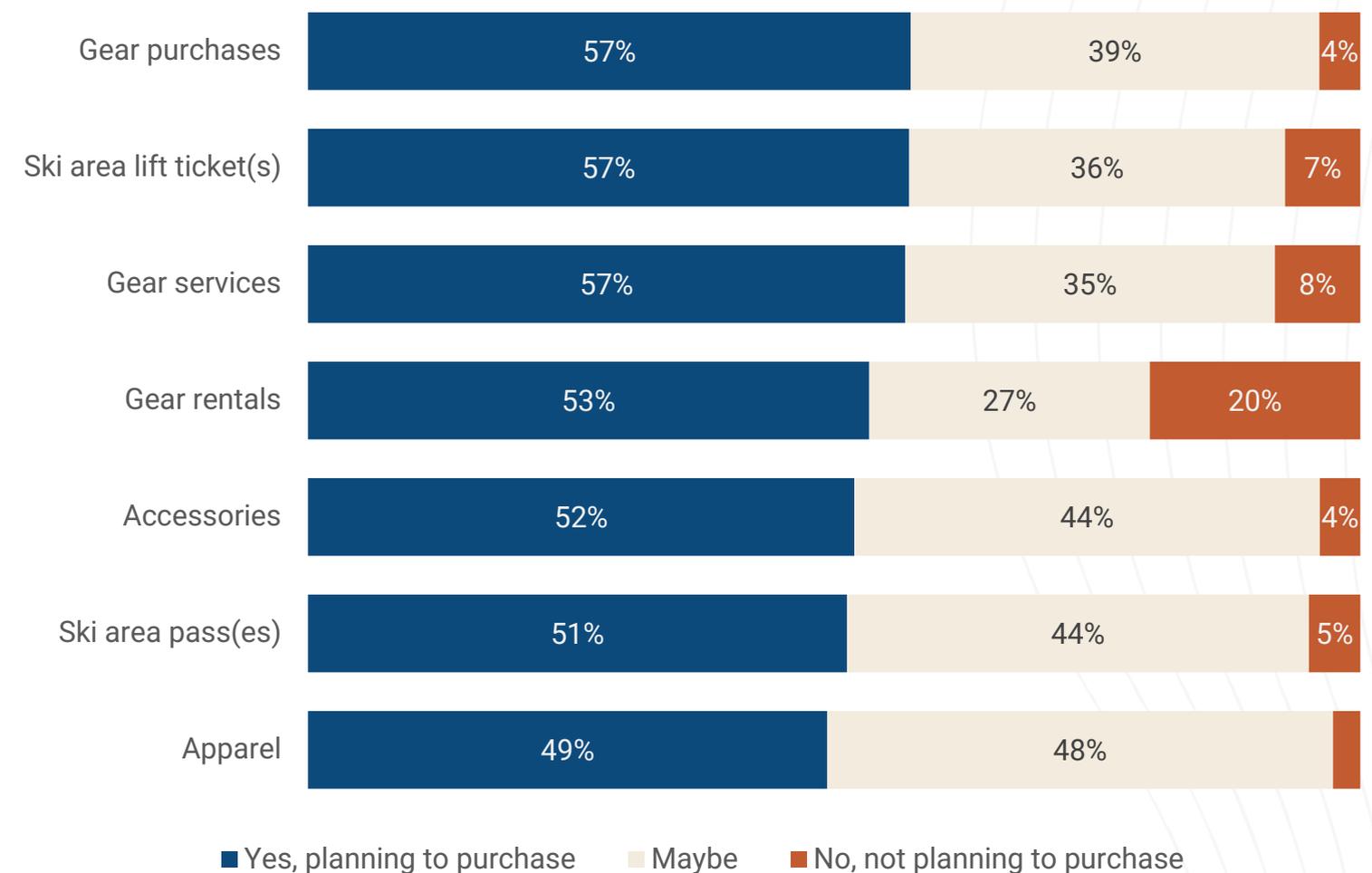
Reasons for Not Purchasing Gear Intended to Purchase



Nearly three in five Enthusiasts that did not purchase gear, lift tickets, or gear services plan to do so next season.

- Nearly three in five Enthusiasts that did not end up purchasing gear, lift tickets, or gear services this winter plan on making the purchase in the 2024-2025 season (57% for each).
- Over half of Enthusiasts that did not end up purchasing gear rentals, accessories or ski passes intend to purchase them next season (53%, 52%, and 51% respectively).
- Less than half of those that did not purchase apparel this winter plan on purchasing next season (49%).
- One fifth of Enthusiasts that did not purchase gear rentals this year do not intend to purchase them next season.

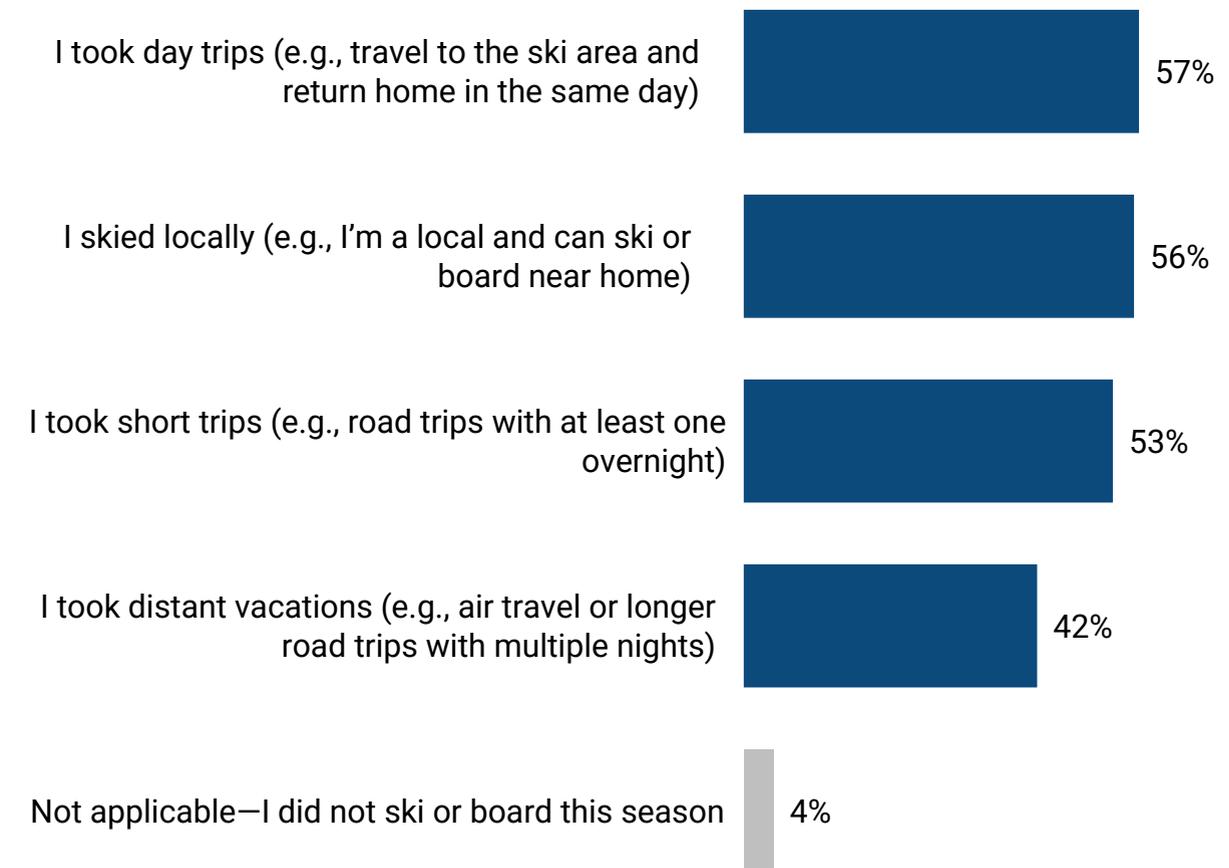
Of Products Intended to But Not Purchased in 2023-24, Intent to Purchase in 2024-25



Enthusiasts most commonly took day trips to ski or snowboard this season.

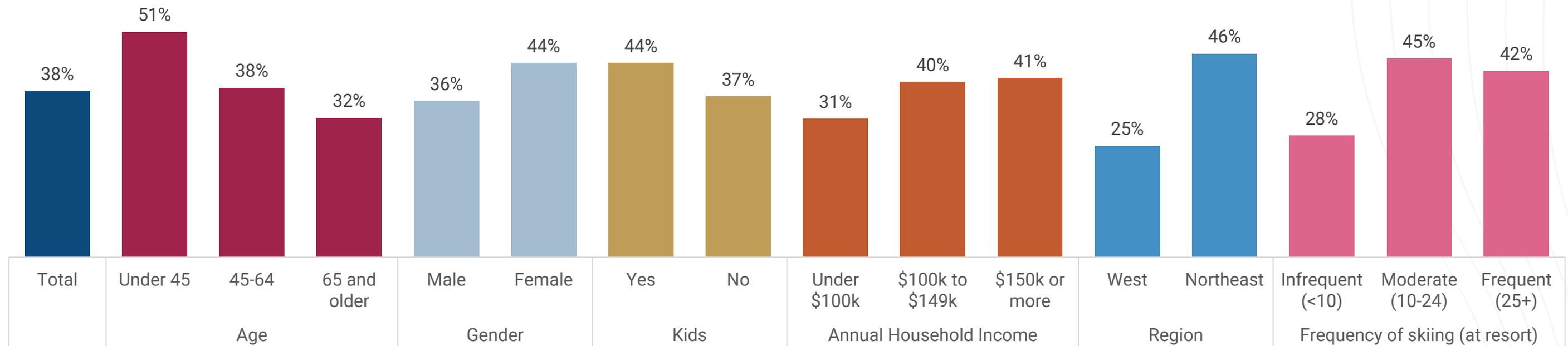
- Nearly three in five Enthusiasts (57%) took day trips for skiing and/or snowboarding.
 - Not Shown:* This proportion was greater among Enthusiasts under the age of 45 (64%) and those that live in the West (59%).
- Over half of Enthusiasts skied locally or took short trips (56% and 53% respectively).
- Less than half of Enthusiasts took distant vacations with multiple overnights (42%).
 - Not Shown:* This proportion was greater among those aged 45-64 (45%) and those that are moderate skiers or snowboarders (10-24 days) (50% and 56% respectively).

How Enthusiasts Skied or Snowboarded in 2023-24



Younger Enthusiasts and those that live in the Northeast more commonly visited a new ski area during the 2023-2024 season.

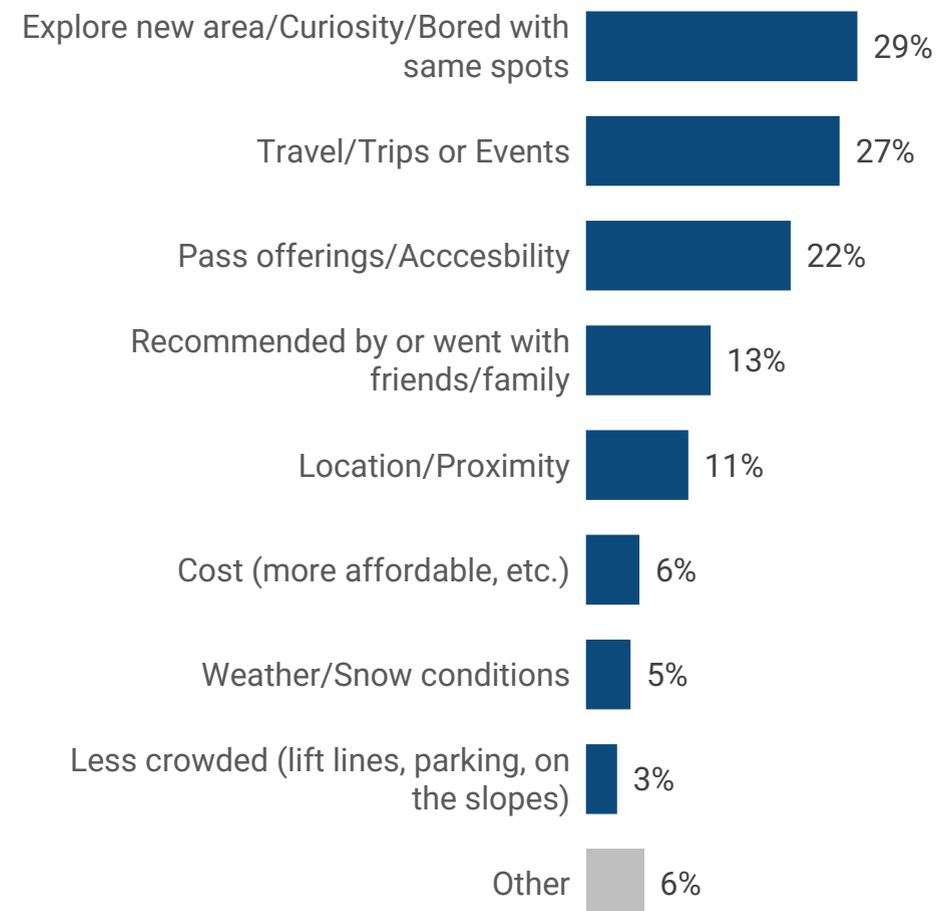
Visited a New Ski Area for the First Time During 2023-24 Season



Enthusiasts most commonly visited a new ski area out of curiosity.

- Over a quarter of Enthusiasts visited a new ski area out of curiosity or because of trips taken (29% and 27% respectively).
- Enthusiasts less commonly visited a new ski area because they were searching for better snow or fewer crowds (5% and 3% respectively).

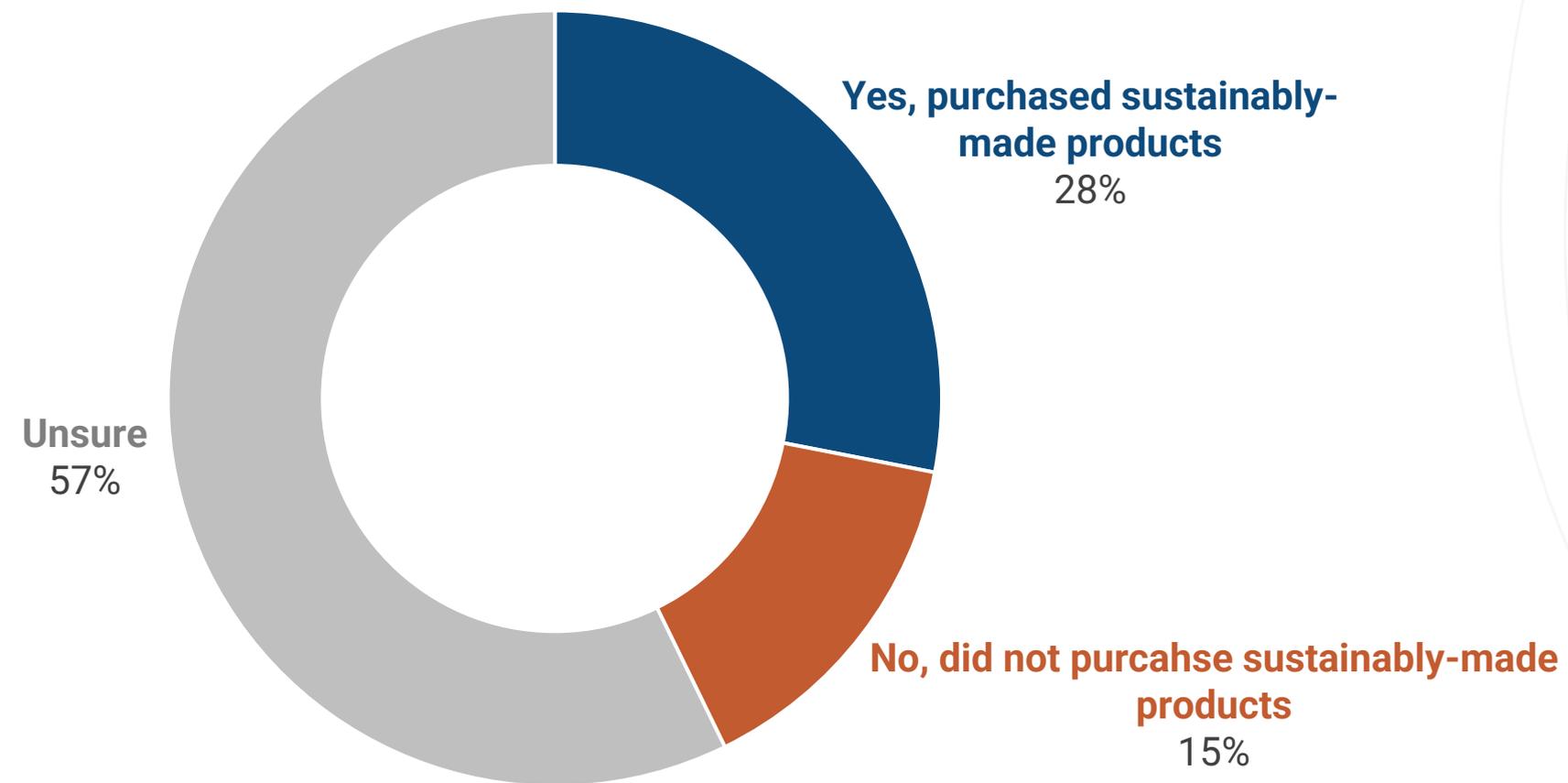
Reasons for Visiting a New Ski Area in 2023-24



SUSTAINABLE GEAR

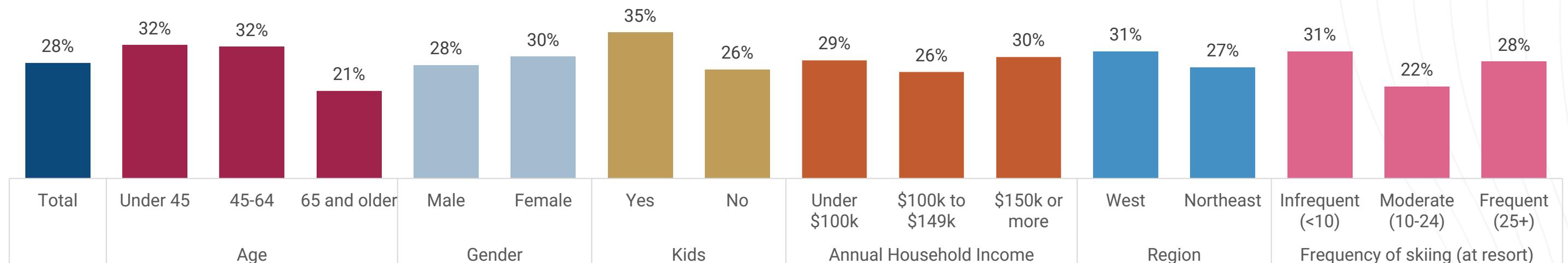
Over half of Enthusiasts are unsure whether the products they purchased were sustainably made.

Purchased Sustainably-Made Gear in 2023-24



Larger shares of Enthusiasts under the age of 65 purchased sustainably-made gear than those over the age of 65.

Purchased Sustainably-Made Gear in 2023-24
(% yes)



The majority of Enthusiasts did not shop based on sustainability.

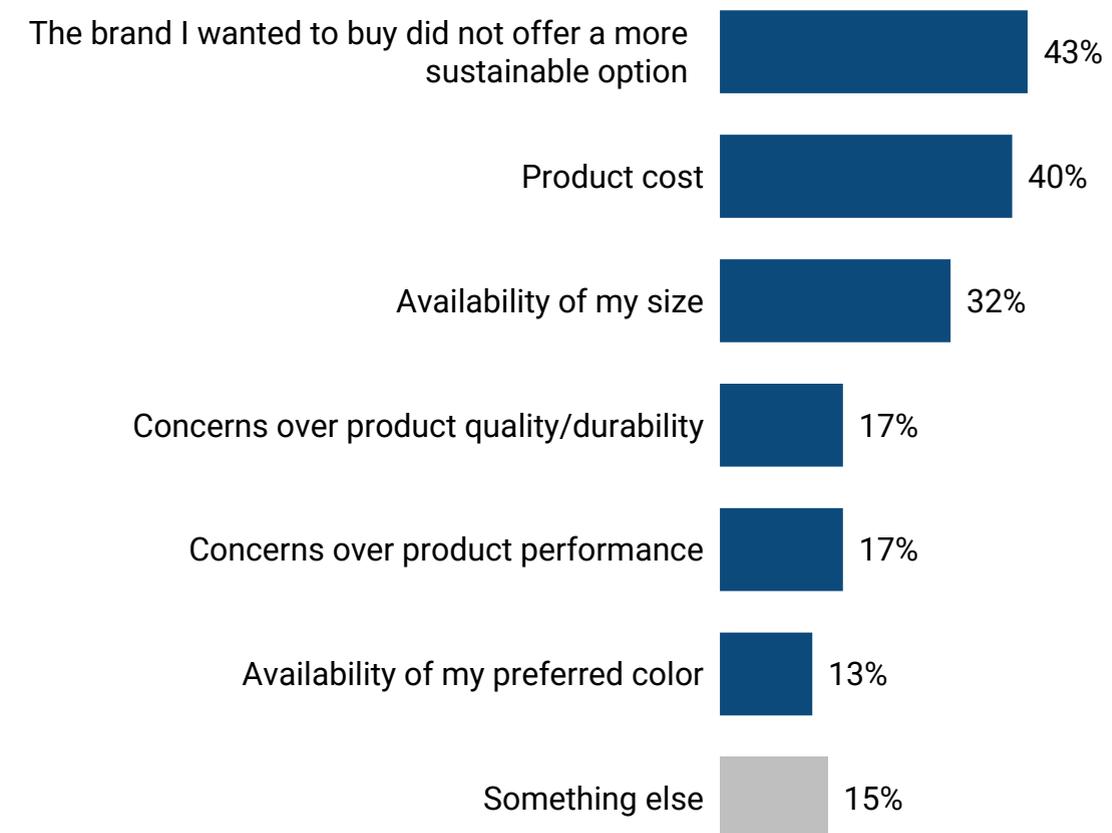
Intent to Purchase Sustainably Made Product and Ability to Do So



Enthusiasts purchased less sustainable products when their preferred brand did not sell sustainable products or when the cost was too high.

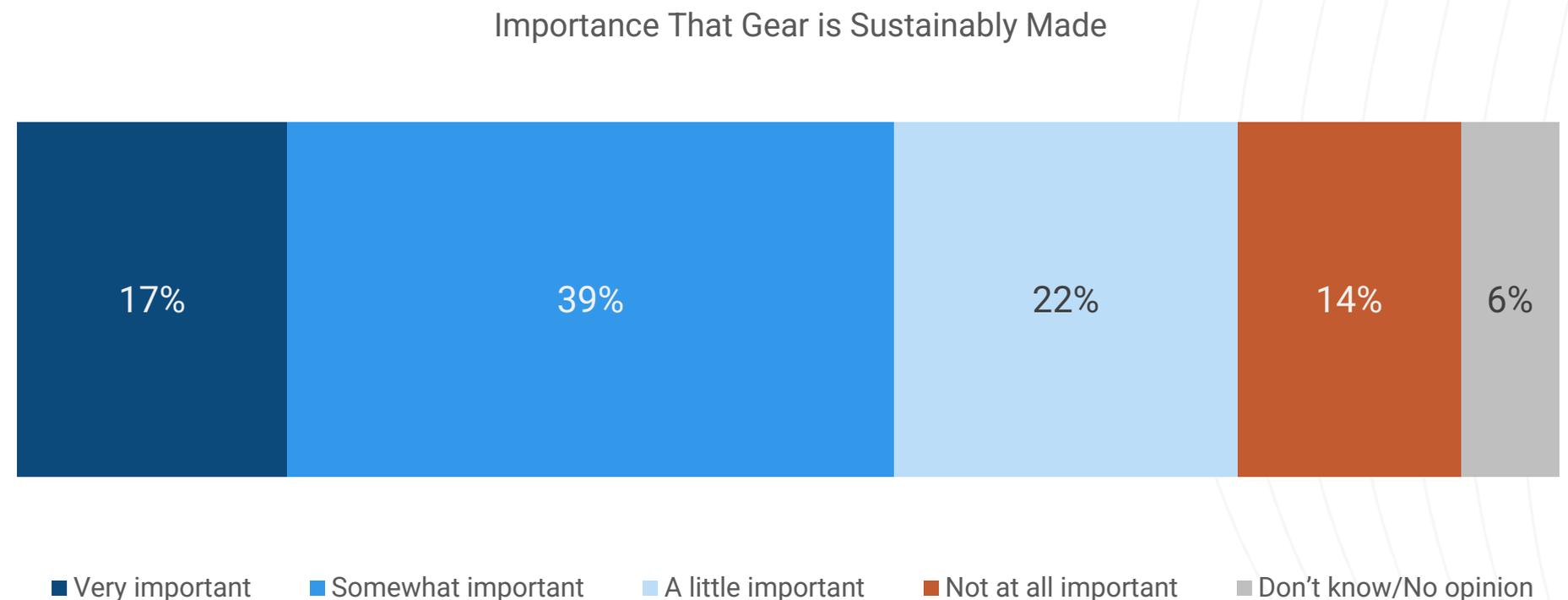
- Enthusiasts seem to be more tied to brands than sustainability – 43% said they purchased a less sustainable product because the brand they wanted did not offer something more sustainable.
- Two in five Enthusiasts said they purchased a less sustainably made product because the sustainable product cost too much.
- About one in six Enthusiasts had concerns over product quality or performance (17% for both).

Factors That Led to Purchase of Less Sustainably-Made Product



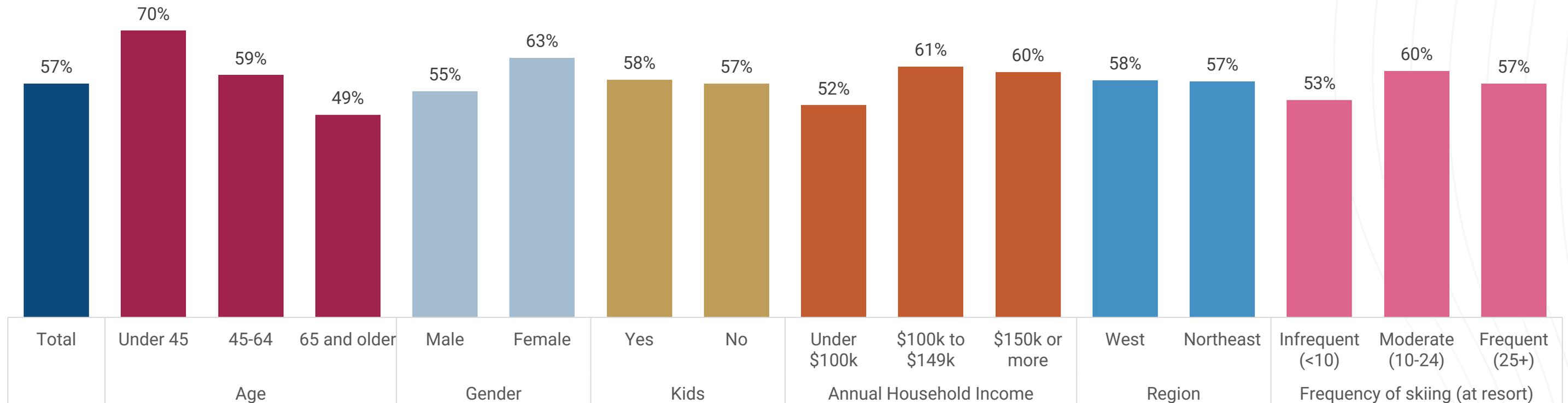
Over half of Enthusiasts said it's somewhat or very important that gear is sustainably made.

- The majority of Enthusiasts said it was somewhat or very important that snowsport gear is made sustainably (56%).
- Only 14% of Enthusiasts said it's not at all important that gear is sustainably made
- *Not Shown:*
 - Enthusiasts under the age of 45 and those that participate in winter activities infrequently (less than 15 times) were more likely to say it was very important that gear be made sustainably (30% and 19% respectively).



It was important for all demographic groups that gear be sustainably made, especially younger people.

Importance of Gear Being Sustainably Made
(% somewhat or very important)

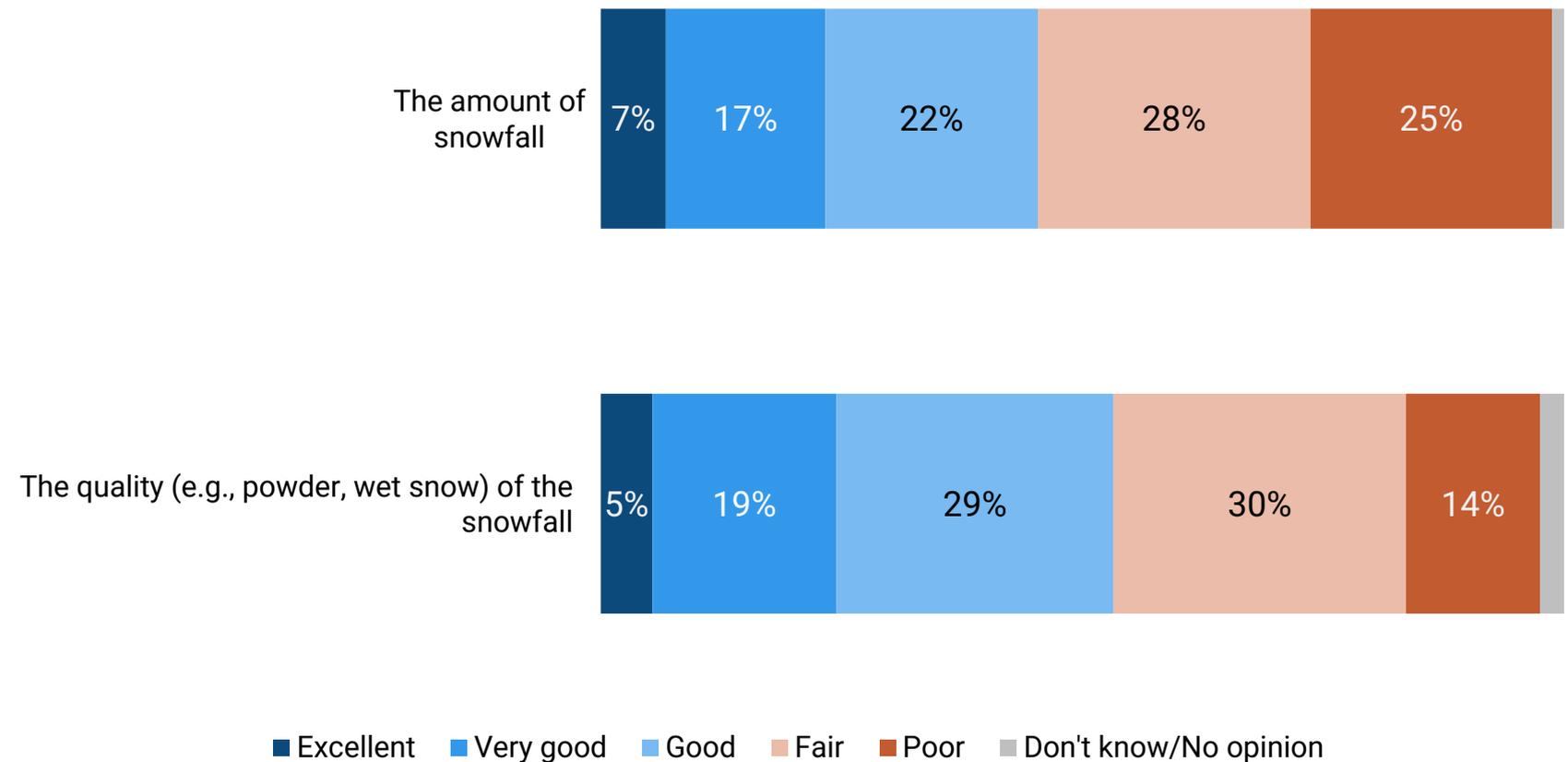


WEATHER IMPACTS

While the majority of Enthusiasts said the amount of snow was fair or poor, over half said the quality was good or excellent.

- One in four Enthusiasts said the amount of snow in their area was poor this season, and another 28% said it was fair.
- About one in four Enthusiasts (24%) said the amount of snow was either very good or excellent.
- Over half of Enthusiasts (53%) said the quality of snow was good, very good, or excellent.
- However, this varied significantly by region of the country (next page).

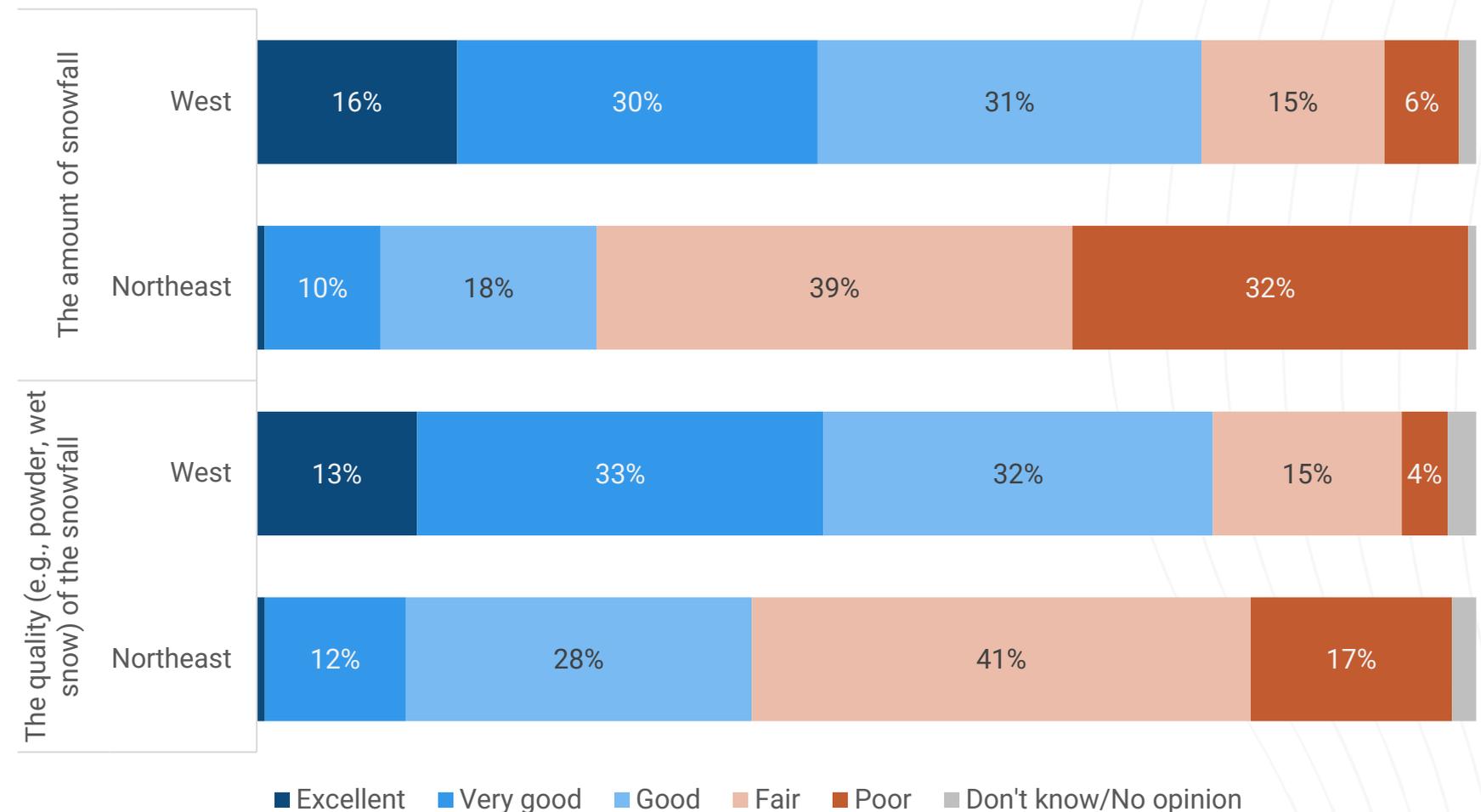
Rating of Snowfall in Usual Area of Participation in 2023-24 Season



Enthusiasts in the West felt both the amount and quality of the snow were better than Enthusiasts in the Northeast.

- More than three quarters of Enthusiasts that participate in the West (77%) said the amount of snowfall in their area was good or better, compared to 29% of Enthusiasts that participate in the Northeast.
- Similarly, 68% of Enthusiasts that participate in the West said the quality of the snow was good or better, compared to 41% of Enthusiasts that participate in the Northeast.

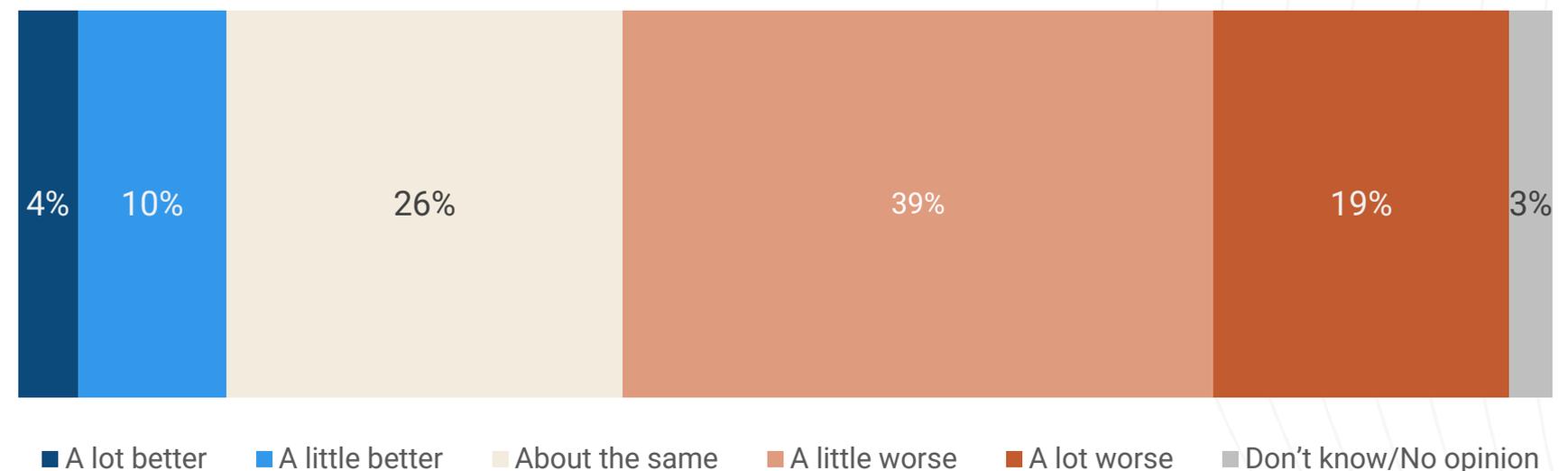
Rating of Snowfall In Usual Area of Participation in 2023-24 Season by Region of Participation



The majority of Enthusiasts said the snowfall this season was worse than the 2022-2023 season.

- Over half of Enthusiasts (58%) said the snowfall in the 2023-2024 season was a little or a lot worse than the previous winter.
- About one in seven Enthusiasts (14%) said the snow was better than the previous season.

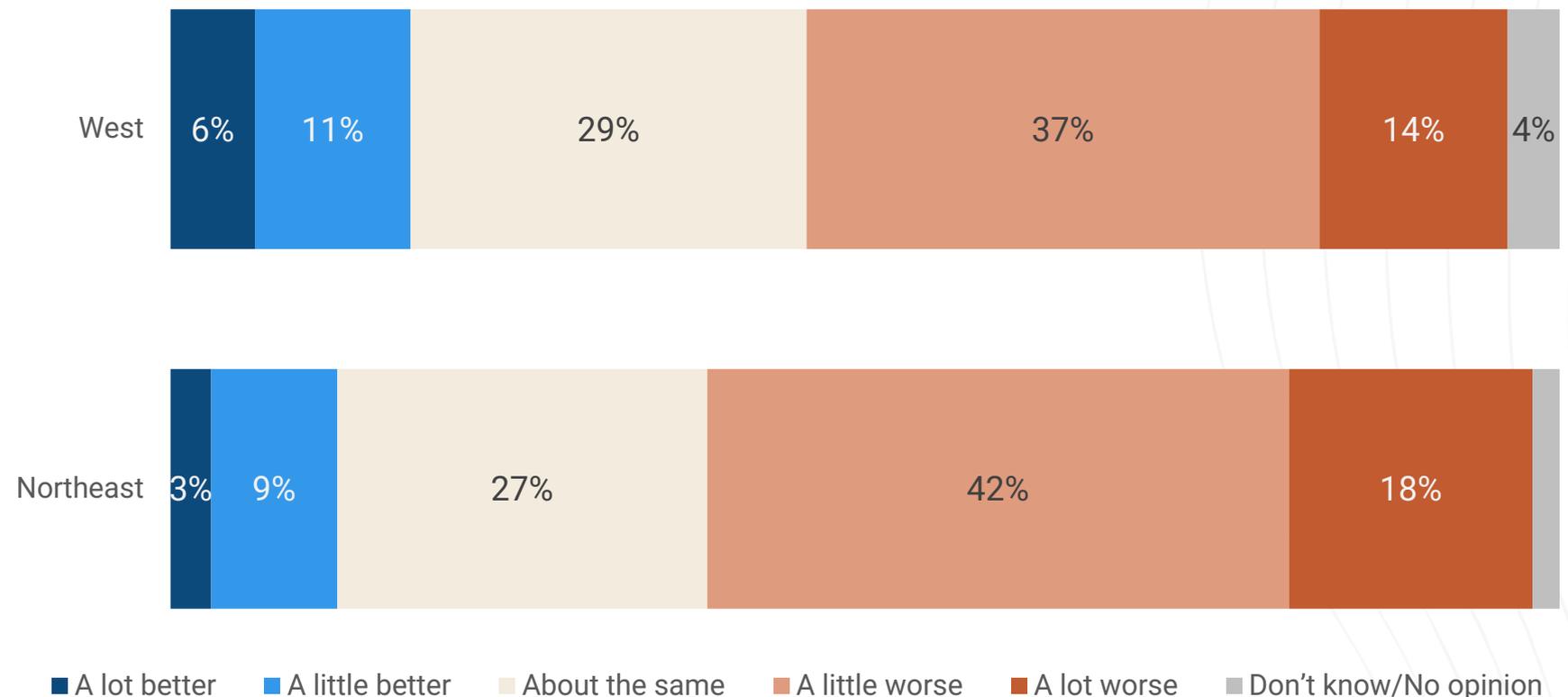
Snowfall in 2023-24 Compared to 2022-23



A greater proportion of Enthusiasts that participate in the Northeast compared to the West thought the snowfall was worse than the previous season.

- While the majority of all Enthusiasts thought the snowfall was worse this year compared to last season, the proportion was greater among those that participate in the Northeast (70%) compared to those that participate in the West (51%).
- A greater proportion of those that participate in the West thought the snow in their region was better this year compared to those that participate in the Northeast (17% compared to 12%).

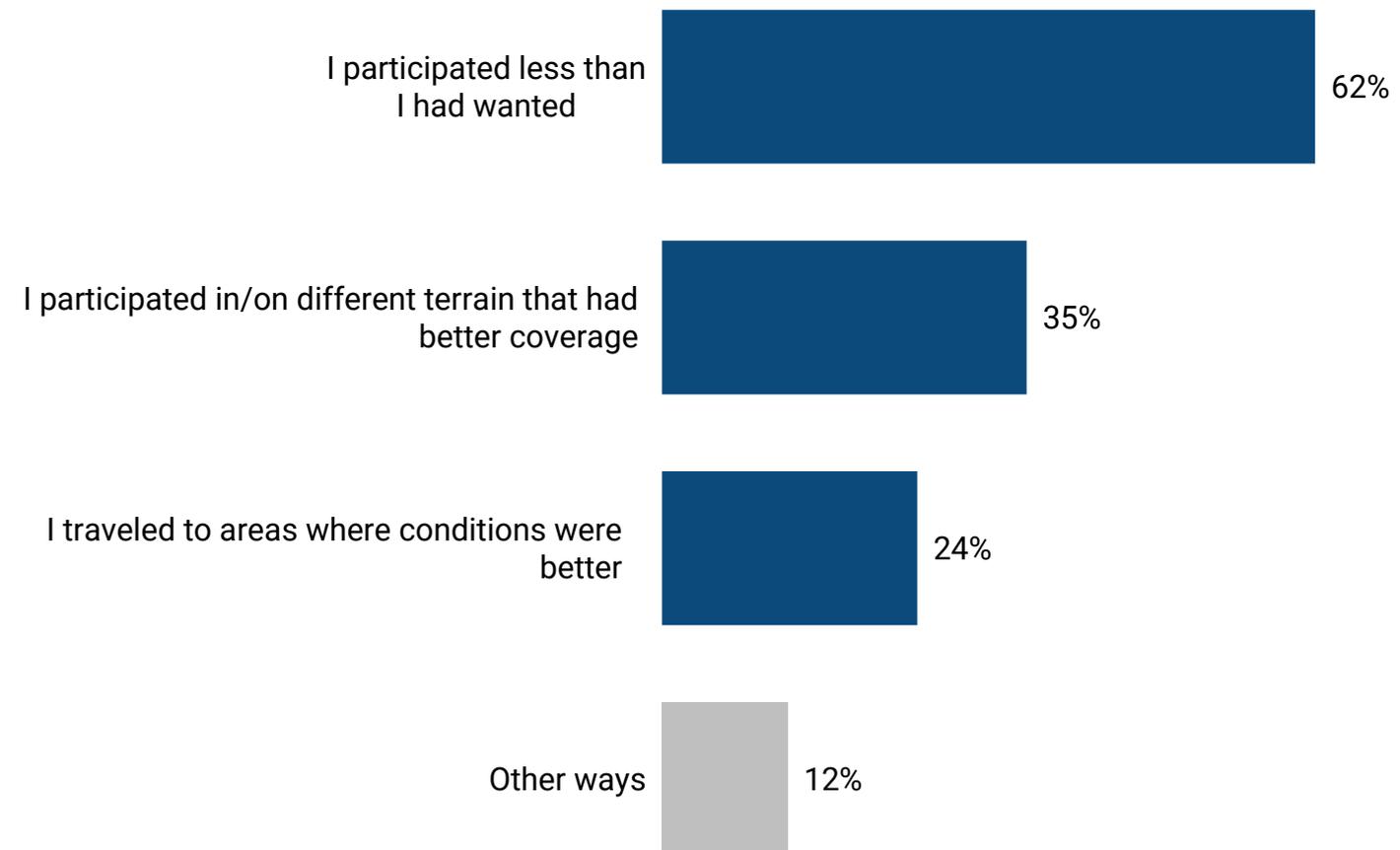
Snowfall in 2023-24 Compared to 2022-23 by Region of Participation



The majority of Enthusiasts said they participated less than they wanted to this season because of worse snowfall.

- Over three in five Enthusiasts (62%) said that worse snowfall in their participation area led them to participate less.
- Over a third of Enthusiasts (35%) said that worse snowfall led them to participate on different terrain.
- About a quarter of Enthusiasts (24%) traveled to different areas with better conditions.

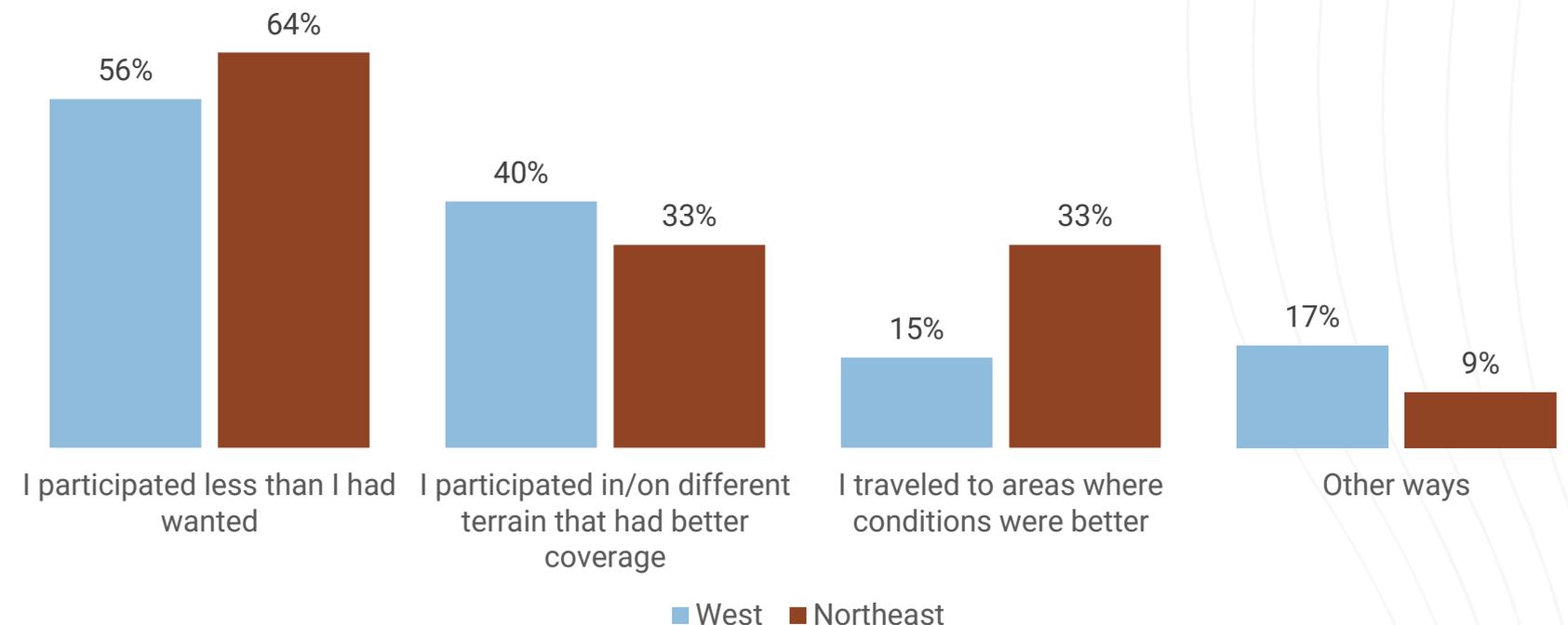
Impacts on Snowsports Participation Due to Worse Snowfall



Participants in the Northeast more commonly said they participated less and/or traveled in search of better conditions compared to those in the West.

- Over half of Enthusiasts that participate in both the West and the Northeast said they participated less than they wanted due to worse snowfall (56% and 64% respectively).
- Participants in the West were more likely than those in the Northeast to have participated on different terrain with better coverage because of worse snowfall (40% compared to 33%).
- A third of Enthusiasts that participate in the Northeast and 15% of those that participate in the West said they traveled to different areas this season because of snow conditions.

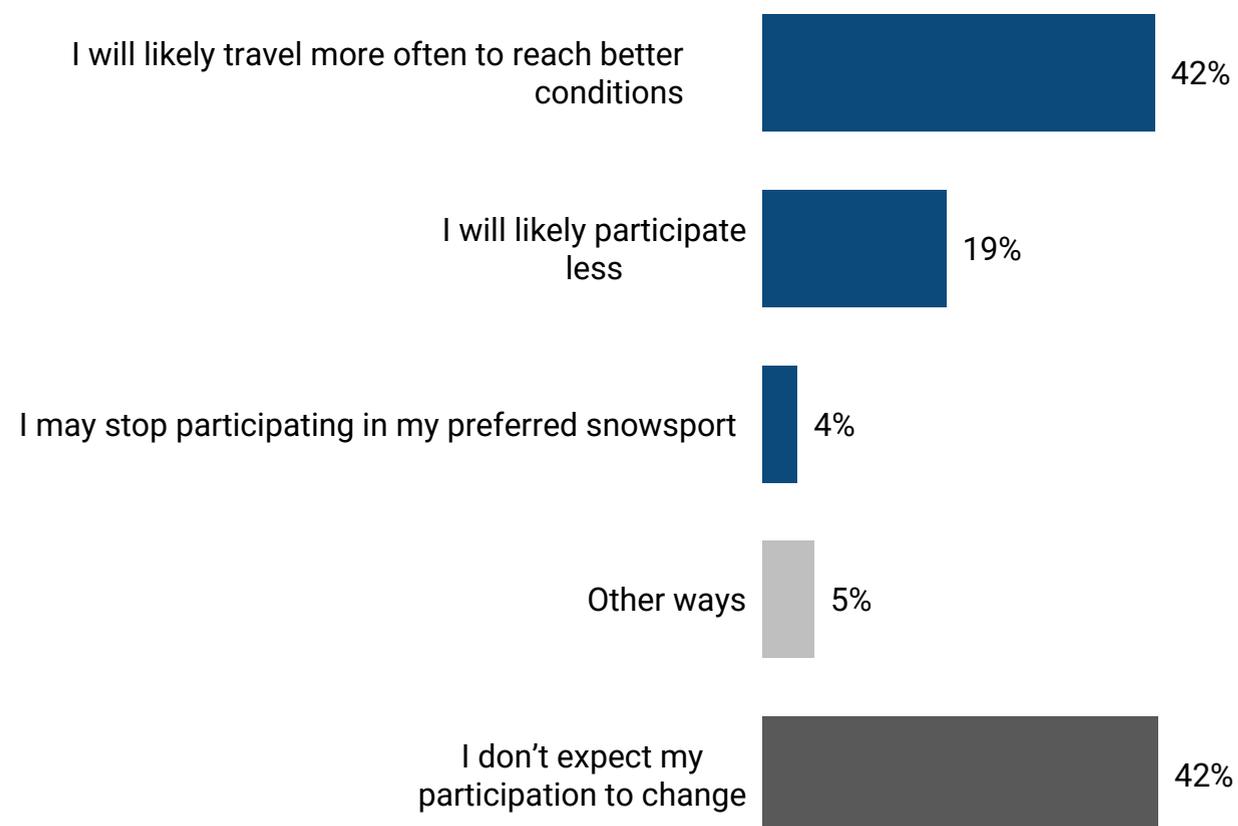
Impacts on Snowsports Participation Due to Worse Snowfall by Region of Participation



Enthusiasts don't expect to stop participating in snowsports due to weather patterns, but might travel more often for better conditions.

- Over two fifths of Enthusiasts (42%) don't expect their participation to change due to shifting weather patterns in the future.
- Over two fifths of Enthusiasts (42%) also said that they will likely travel more often to reach better conditions in the future.
- Less than one fifth said they would likely participate less (19%), and only 4% said they might stop participating altogether.
- *Not Shown:*
 - Enthusiasts under 45 and infrequent skiers were more likely than others to say they will likely participate less (24% and 30% respectively).

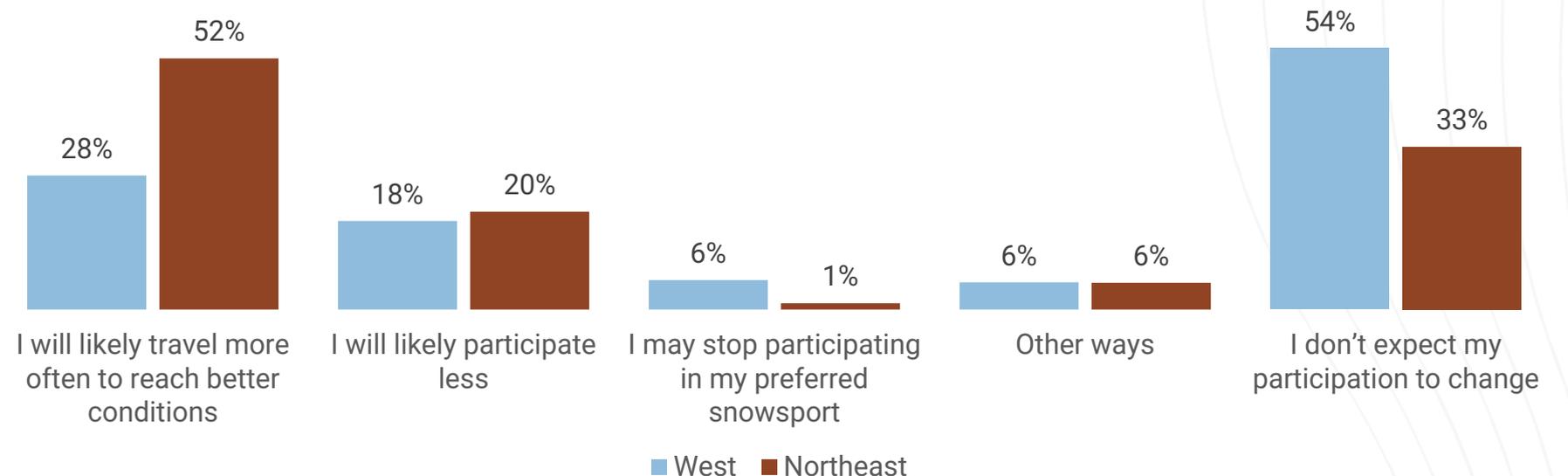
Expected Impacts on Snowsports Participation Due to Shifting Weather Patterns



Enthusiasts in the Northeast were more likely to expect to travel for better conditions in the future, while the majority of those in the West don't expect any changes.

- Over half of Enthusiasts in the Northeast (52%) say they expect to have to travel more in the future to reach better conditions.
- One in five Enthusiasts in the Northeast said they will likely participate less due to shifting weather patterns.
- Over half of Enthusiasts in the West (54%) don't expect their participation to change.

Expected Impacts on Snowsports Participation Due to Shifting Weather Patterns by Region of Participation

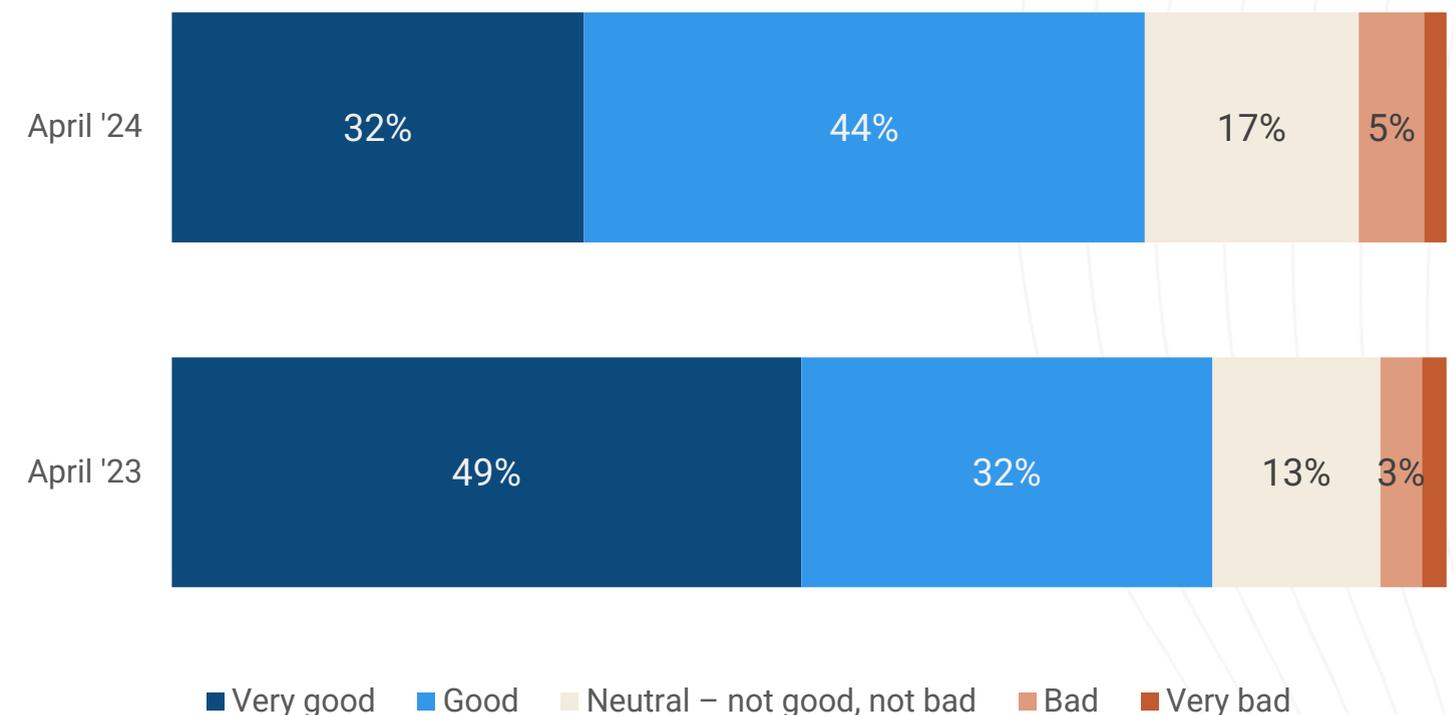


LOOKING AHEAD

A majority of Enthusiasts rated their personal experience with snowsports this season as good or very good.

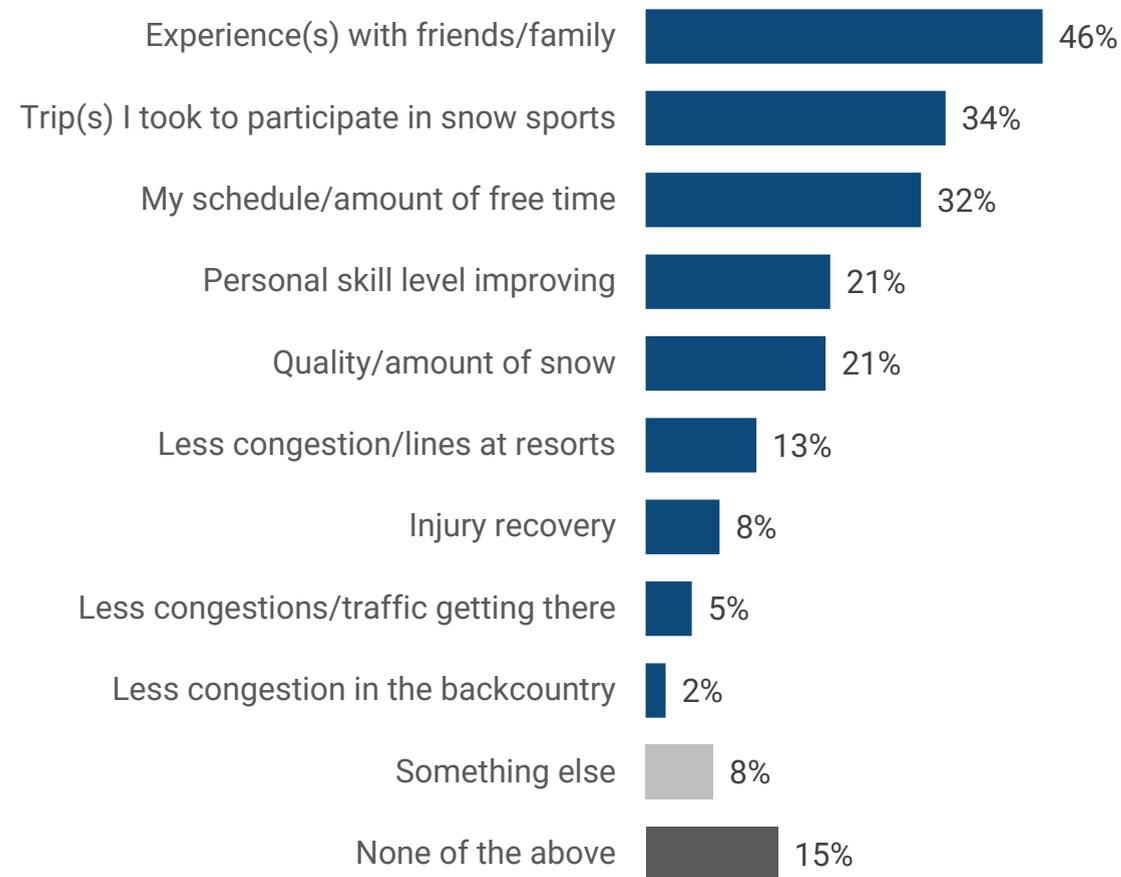
- A greater share of Enthusiasts rated their personal experience in the 2022-23 season as “very good” (49%) than they did for this current season (32%).
- Less than one in ten Enthusiasts rated their past seasons as bad.

Personal Experience with Snowsports Participation This Season



Over half of Enthusiasts that felt this season was worse than the last cited poor-quality snow as the reason why.

Reasons 2023-24 Season Was Better Than 2022-23

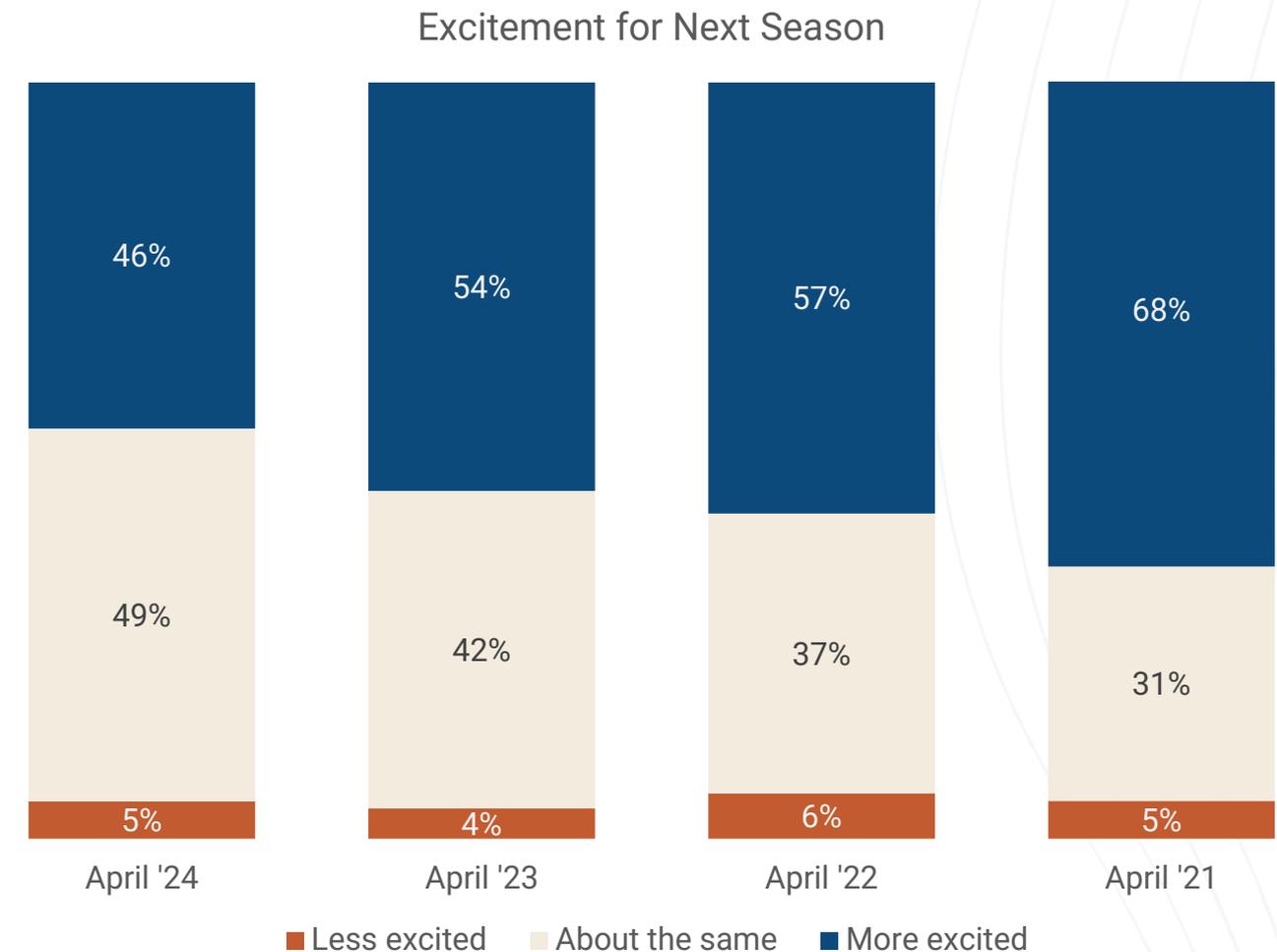


Reasons 2023-24 Season Was Worse Than 2022-23



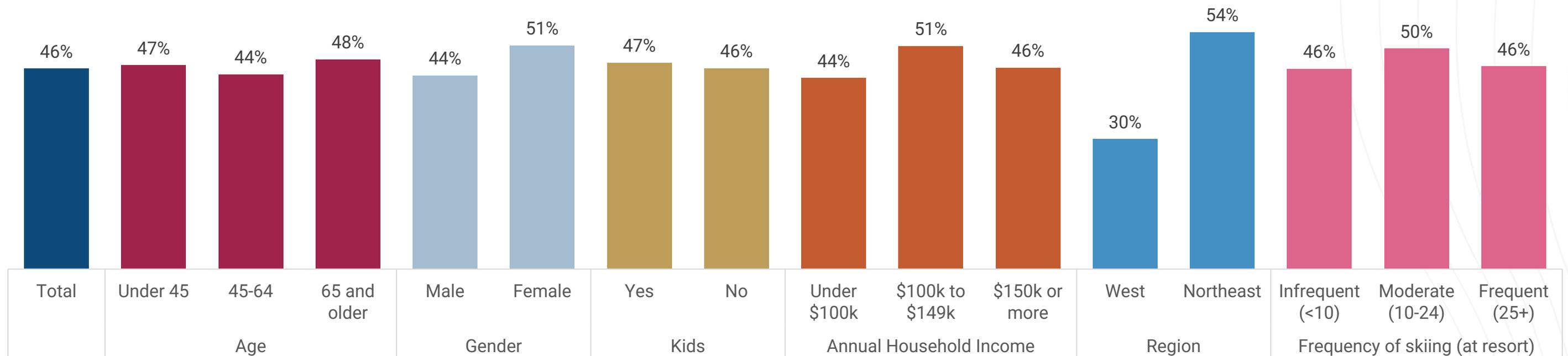
For the first time in three years, less than half of respondents said they were more excited for the upcoming season than the current one.

- Excitement for the next winter season was highest in 2020-21 (68%), likely due to resorts and travel opening back up after Covid restrictions.
- Since then, excitement has declined slowly, and this year, less than half of Enthusiasts (46%) said they were more excited for the next winter season.
- Still, the proportion of respondents that said they were less excited for the upcoming season was very low every season.



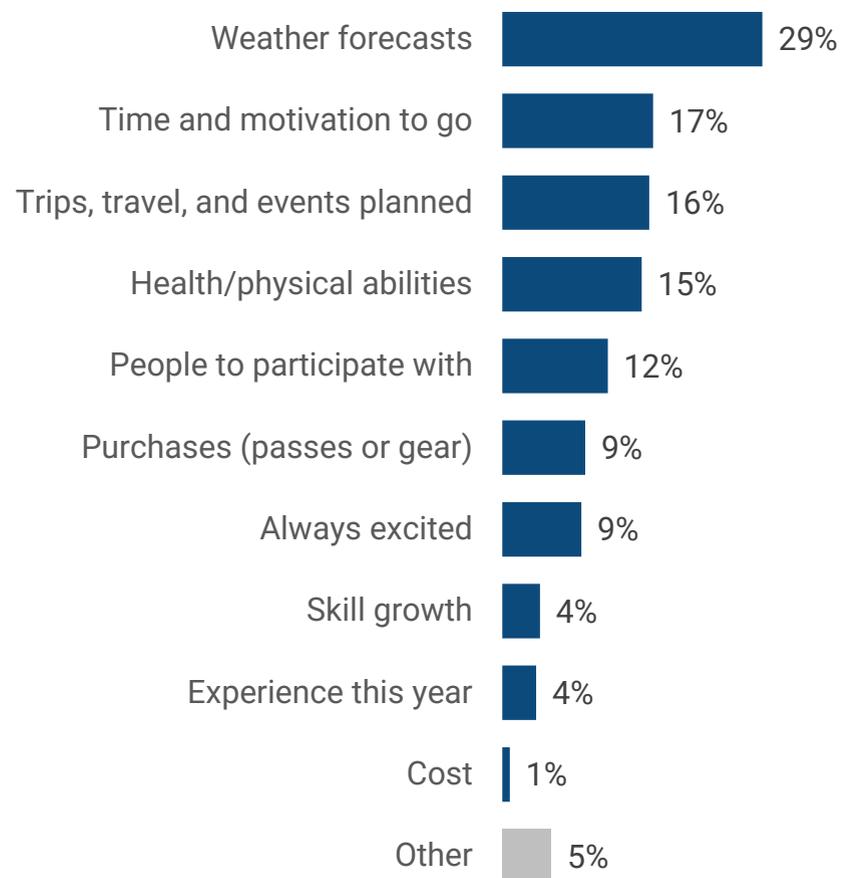
Groups generally reported similar levels of excitement for the 2023-24 winter season, but significantly more Northeasterners than Westerners.

Excitement for Snowsports
(% a little or much more excited - April '24 only)

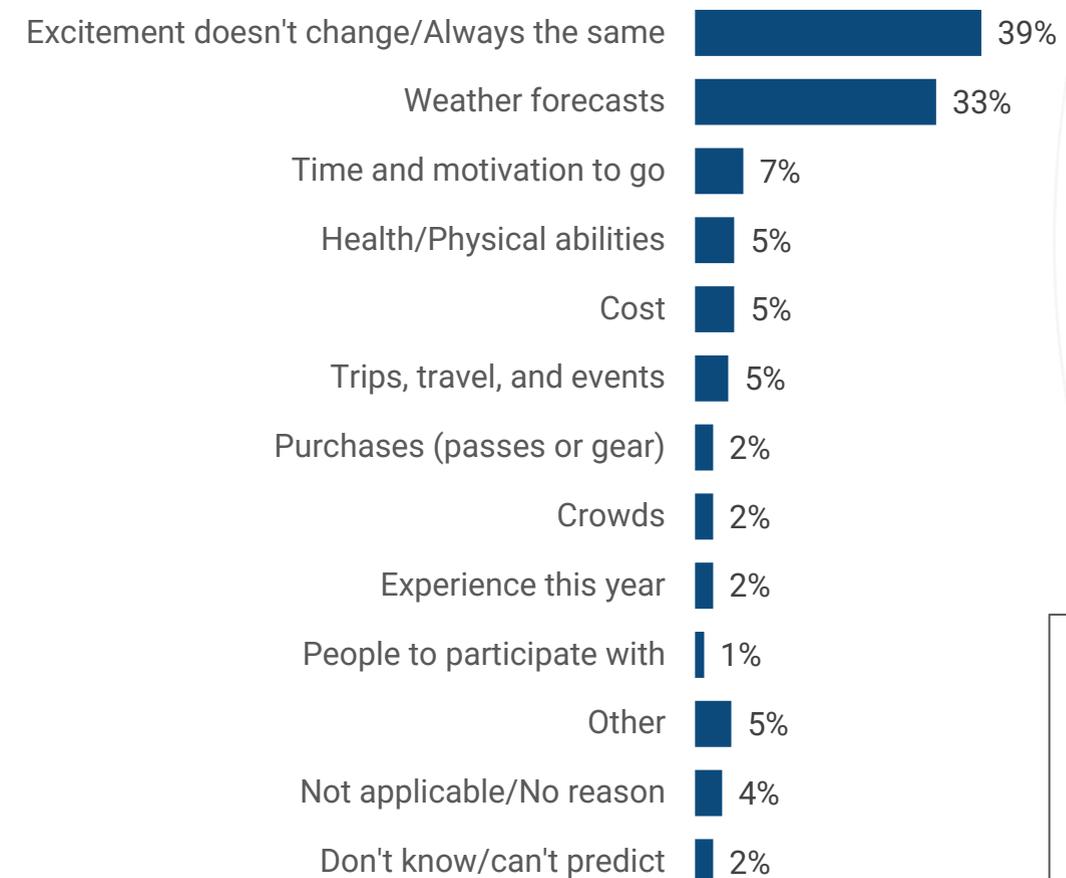


Enthusiasts were excited for next season, mostly due to weather forecasts.

Reasons for Being More Excited for 2024-25



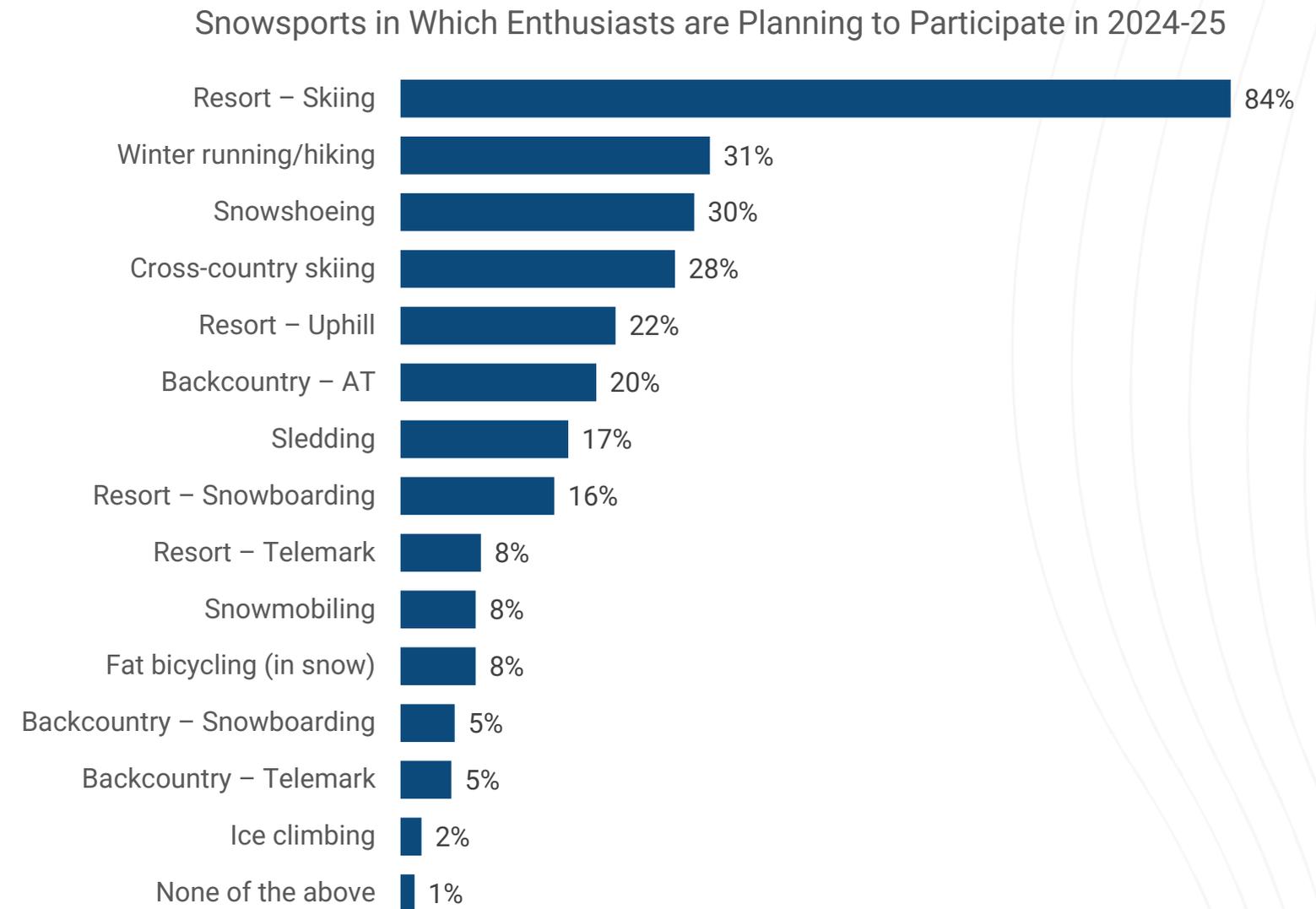
Reasons for Being Just as Excited for 2024-25



Due to a small sample size, reasons for feeling less excited are not shown here.

The majority of Enthusiasts plan to ski at a resort next season.

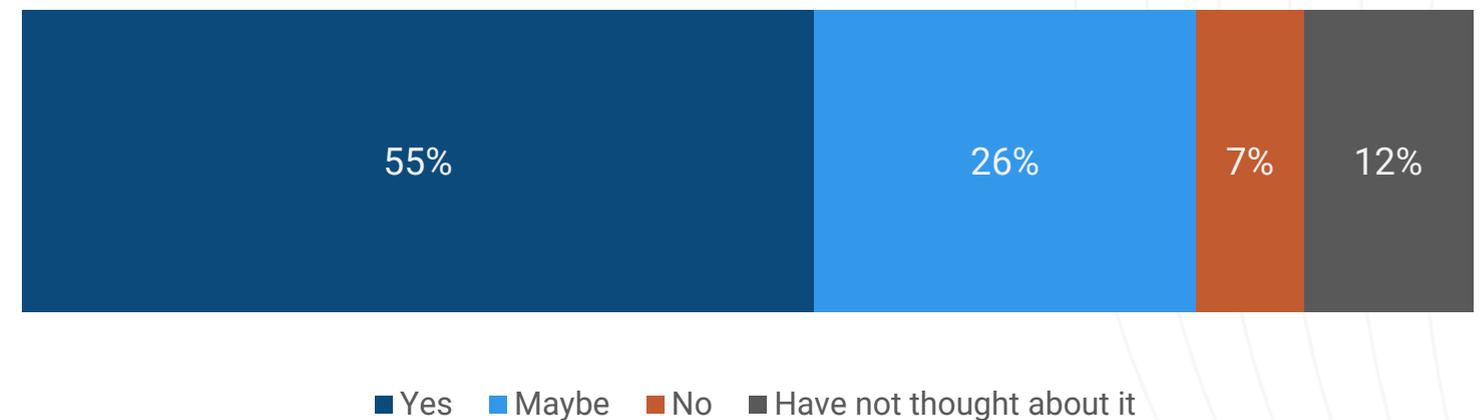
- More than four out of five Enthusiasts (84%) said they plan to ski at a resort in the next winter season.
- Around a third also planned to winter run/hike and/or snowshoe (31% and 30%, respectively).
- About one in six Enthusiasts said they plan on snowboarding at a resort next winter (16%).



The majority of Enthusiasts plan on taking a snowsports-focused vacation next winter.

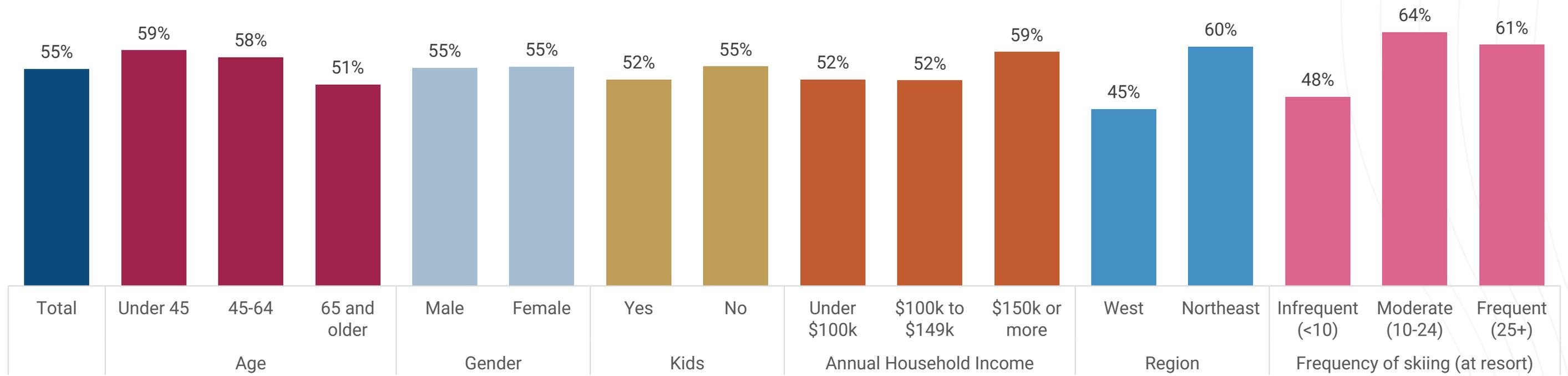
- Over half of Enthusiasts (55%) said they plan on taking a snowsports vacation in the 2024-2025 winter season.
- Less than one in ten Enthusiasts said they were not going to take a snowsports-focused vacation next winter, and another 12% said they had not thought about it.

Plans to Take a Snowsports-Focused Vacation in 2024-25



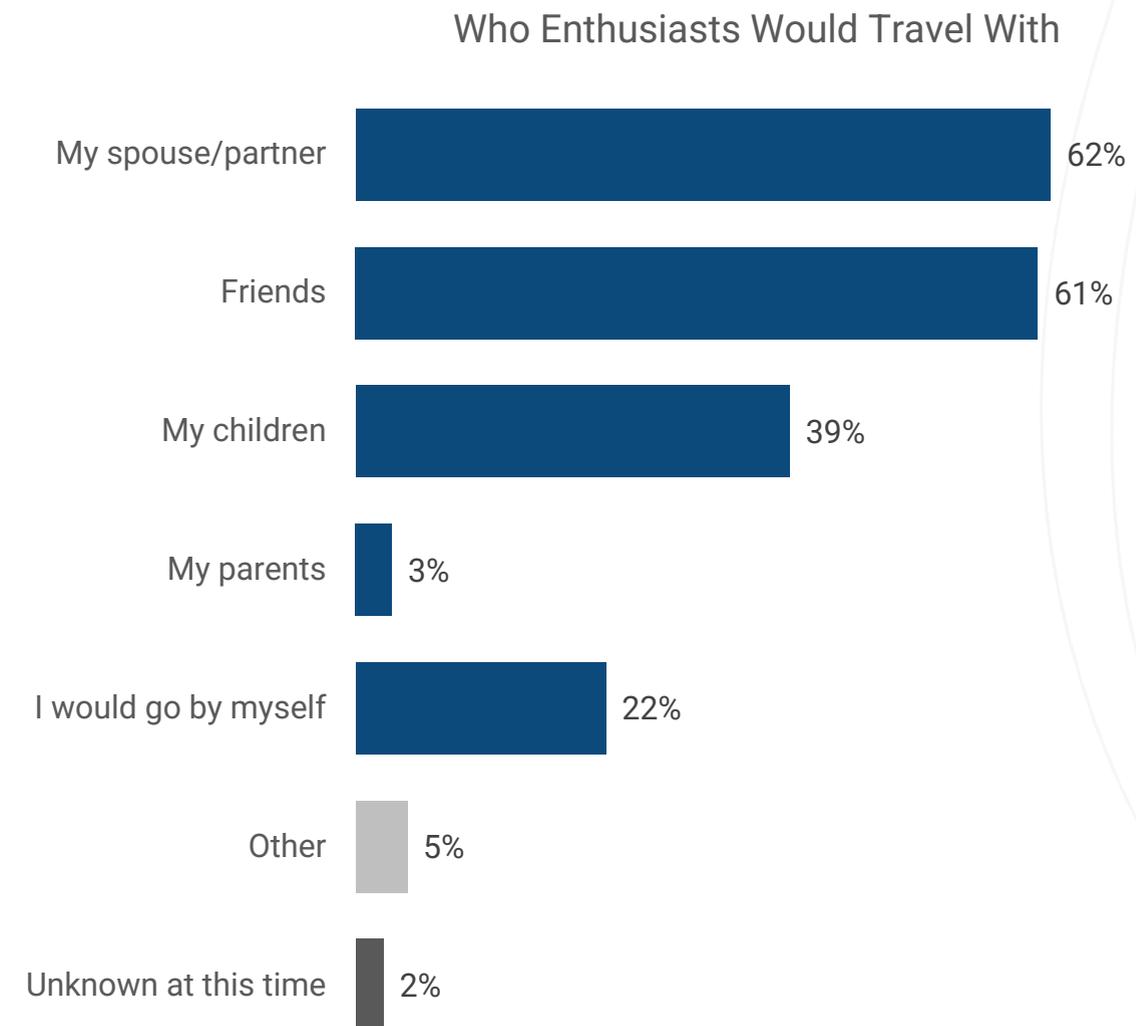
Enthusiasts in the Northeast were more likely to plan on taking a snowsports vacation than those in the West.

Planning to Take a Snowsports-Focused Vacation Next Season
(% yes - April '24 only)



Enthusiasts most commonly plan on traveling with their partners or friends.

- Nearly two-thirds of Enthusiasts said they were likely to travel with their spouse/partner (62%) and/or their friends (61%).
- About two in five said they were likely to travel with their children (39%).
- About one in five said they would go by themselves (22%).





APPENDIX

METHODOLOGY

MODE

- Online survey (desktop and mobile friendly)

SAMPLING

- Respondents were drawn from SIA's in-house panel. As noted earlier, these respondents came from attendees at events, including partner events, or otherwise have selected to receive communications from SIA.

DESIGN

- Corona Insights drafted this survey instrument based on the survey conducted in April 2021, April 2022, and April 2023. Revisions were made to ensure questions were still relevant and useful in 2024.
- The survey was conducted in English.

INCENTIVE

- Participants were offered a chance to win one of five \$50 gift cards to Backcountry.com (retailers are rotated between surveys throughout the season).

EXECUTION

- In total, 567 surveys were completed and included in this analysis; this included 6 partial surveys that were complete enough for inclusion.
- Surveys were conducted in April and May 2024 (April 23 – May 6).
- The median time it took to complete the survey was 12 minutes.

ADDITIONAL RESOURCES

Along with this report, several supplementary files are available for additional context and detail.

- **Survey instrument.** The full survey instrument used in this study has been provided for reference.
- **Analysis tables.** All results, both overall and by segment, are provided in a separate Excel file. This allows you to see results by question for different segments (see list at right). Additionally, all open-ended responses are provided verbatim in this file.
- **Segments examined:**
 - Age
 - Gender
 - Kids
 - Household income
 - Region of residence
 - Winter Activity Frequency
 - Specific Snowsport Participation

ABOUT SIA RESEARCH

In addition to this report, SIA publishes a wide variety of research products across consumer, retail, and winter participation.

- CONSUMER INSIGHTS
- INSIGHTS INTO DIVERSITY IN SNOWSPORTS
- NPD END OF SEASON RETAIL SALES REPORT
- WHOLESALE SALES AND ORDERS
- PARTICIPATION INSIGHTS REPORT
- CONSUMER PANEL
 - Year Over Year (YOY) surveys conducted across a nationwide group of consumers:
 - Consumer Anticipation (early season)
 - Snowsports Retail Consumer Behavior
 - Retail and Direct-to-Consumer for Snowsports
 - Holiday Purchases
 - Snowsports Used Marketplace
 - Snowsports Consumer Rental and Service
 - Snowsports Technology and Participation
 - Diversity in the Snowsports Industry
- CUSTOM RESEARCH
- For more information, please reach out to research@snowsports.org

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Corona Insights, a Denver-based research, evaluation, and consulting firm, designed the research (with input from SIA), managed the execution of the survey, performed all analyses, and provided this report.

Project Leads:

- David Kennedy, *Principal/CEO*
- Sam Keating, *Senior Associate*
- Gracia Seeley, *Associate*



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