

SNOWSPORTS INDUSTRIES AMERICA

THE IMPACTS OF COVID-19 ON SNOWSPORTS CONSUMER TRENDS AND INSIGHTS



THE IMPACTS OF COVID-19 ON SNOWSPORTS CONSUMERS

In this first of its kind, SIA has surveyed over 1,000 avid winter enthusiasts on the impact COVID-19 has had on their spending, shopping, planning and general thoughts on the upcoming winter season.

In effort to help the winter outdoor industry better understand consumer insights and sentiment, SIA is conducting two major consumer reports each season. This is the first report.

SIA supports its winter outdoor members through powerful research, education and business tools, while advocating for issues that impact the future of the industry.

WE'RE UNITED BY WINTER. JOIN US.

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The season will be an opportunity for the snowsports industry to innovate and reassure consumers that winter activities can be enjoyed safely, both from a physical and economic perspective. The dichotomy the snowsports industry must collectively overcome is that, while on and off hill recreation activities are generally safe by nature, the social nature of off hill activities present challenges to effectively control virus spread. As participants, we can only hope that early season results of virus mitigation planning and consumer's adherence to safety protocols established by resorts on and off hill prove effective to restore consumer confidence and economic vitality for the industry we love.

”

A final comment from a survey respondent.



POWERED BY:
snowbound



BACKGROUND

PROJECT OVERVIEW

This research is designed to help SIA members be better informed about likely changes in snowsports consumer behaviors this year due to the COVID-19 situation. The survey broadly seeks to answer the following questions:

- What are broad perceptions of the impacts of the COVID-19 situation on consumer confidence and spending?
- What outdoor activities have consumers participated in, and how do they anticipate their participation changing this year?
- What is the profile of members of the list in terms of demographic characteristics and past show attendance?

Two waves were conducted during the summer of 2020 (July and August) to understand the how sentiment and expectations were trending heading into the 2020/21 season. *(The July survey formed as a baseline, and the August survey focused on a subset of questions that were of particular interest for examining trends.)*

RESPONDENT PROFILE

This table summarizes the profile of respondents to the survey. Keeping in mind that this is not a representative sample of all snowsports participants, this table serves as context for the findings presented throughout the report.

	July	August
Age		
<35	13%	12%
35-44	15%	14%
45-54	24%	27%
55-64	31%	31%
65+	17%	16%
Gender		
Male	64%	63%
Female	36%	37%
Prefer to self-describe	1%	1%
Sexual Orientation		
Heterosexual	96%	96%
Other descriptors	4%	4%
Marital Status		
Married/Living with Partner	72%	18%
Single/Never Been Married	19%	71%
Separated/Divorced	8%	9%
Widowed	1%	2%
Children in Household		
Yes	33%	34%
No	67%	66%
Region		
Northeast	63%	58%
West	31%	35%
Other	6%	7%

	July	August
Employment Status		
Employed for wages	62%	62%
Retired	15%	14%
Self-employed	13%	14%
Out of work and looking for work	4%	5%
Out of work but not currently looking for work	2%	2%
A student	2%	2%
A homemaker	1%	2%
Unable to work	0%	0%
Household Income		
Less than Associate's degree	13%	14%
Associate degree	6%	5%
Bachelor's degree	48%	47%
Master's degree	24%	24%
Professional/Doctorate degree	9%	10%
Household Income		
\$0 to \$19,999	1%	2%
\$20,000 to \$49,999	7%	6%
\$50,000 to \$99,999	27%	25%
\$100,000 to \$149,999	22%	21%
\$150,000 to \$199,999	18%	19%
\$200,000 or Greater	25%	27%

	July	August
Ethnicity		
White/Caucasian	93%	94%
Asian	5%	2%
Hispanic, Latino/Latina, or Spanish origin (any race)	2%	3%
Black/African American	1%	1%
American Indian or Alaskan Native	1%	1%
Native Hawaiian or Other Pacific Islander	1%	0%
Other	2%	3%
Participant Type		
Social skier/boarder/biker/other	58%	55%
Health conscious	48%	45%
Family/parent	44%	41%
Aspirational/lifestyle	43%	42%
Solo skier/boarder/biker/other	37%	33%
Vacationer	35%	29%
Hard core	35%	32%
Casual/infrequent/fair-weather skier/boarder/biker/other	17%	15%
Competitor/Athlete	15%	12%
Beginner	3%	2%
Non-participant/Purchaser-only	1%	1%
Other	10%	9%

A solid yellow horizontal bar.

KEY TAKEAWAYS FROM SNOWSPORTS CONSUMERS



ECONOMY & SPENDING

Personal Economic Impacts

Optimistic about the Economy 

July	August
23%	20%

Anticipating Reduced Income 

July	August
44%	41%

Anticipating Reduced Spending 

July	August
67%	61%

Anticipating Reduced Savings 

July	August
35%	33%

Noteworthy Changes in Anticipated Spending



Modest Increases

Groceries
Alcohol



Slight Reductions

Outdoor/recreation gear and products
Travel by car
Fitness and wellness



Significant Reductions

International/domestic flights
Hotel/resort stays
Restaurants

OUTDOOR PARTICIPATION

Net Expected Change in Participation
(among participants in each activity - August)

General Outdoor Activities



Bicycling

+59%



Paddlesports

+54%



Snowsports

+28%



Camping

+52%



Hiking or Backpacking

+51%

Snowsports Activities



Fat Tire Bicycling

+48%



Backcountry – AT

+57%



Snowshoeing

+57%



Uphill Skiing

+48%



Cross-Country Skiing

+65%

OPTIMISM AND EXCITEMENT

Excited for Snowsports

July	August
42%	45%

Most excited groups:
Frequent participants,
younger people, men

Biggest Concerns

- Not knowing how long the situation will last
- Overall public health
- Impacts on travel plans

Optimistic about Participating

July	August
42%	45%

Least optimistic group:
Higher income

Smallest Concerns

- Negative impacts on job or income
- Not being able to get supplies
- Not being able to make ends meet

IN-PERSON VS. ONLINE RETAIL

More Likely to Purchase Snowsports Products In Store

Before COVID-19

July	August
54%	N/A

During COVID-19

July	August
12%	6%

After COVID-19

July	August
26%	15%

Key Benefits of
In-Person Shopping



Ensuring a proper fit
Ease of returns

Key Benefits of
Online Shopping



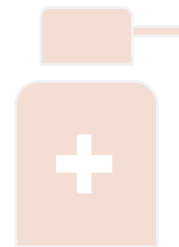
Variety of products
Better pricing and discounts

IN-PERSON RETAIL SAFETY

Key Safety Measures for In-Person Shopping



Masks
(for both customers
and staff)



Sanitizing frequently-
touched surfaces
and hand sanitizer
availability



Spacing for
customers
(and capacity
limits)



Temperature checks
for staff

OVERALL FINDINGS

- **Enthusiasts are more likely to be excited than not excited for the winter season ahead** and are generally confident about their ability to participate. In fact, a majority have already taken actions to prepare (e.g., bought a ski pass, researched COVID-related impacts, researched gear, etc.).
- **Concern about COVID-19, broadly, is mixed.** Most enthusiasts aren't particularly worried about COVID's impacts on their own lives, but they worry about the broad societal impacts.
- Even so, **many expect reductions in income, spending, and savings.** Travel, in particular, will likely be dramatically reduced this season compared to the past. However, most still plan to spend on outdoor gear and products, even if that spending is slightly reduced from "normal."
- **If resorts are unable to operate this season, enthusiasts will likely turn to snowshoeing, cross-country skiing, and non-snowsports activities.** In addition, winter running/hiking, sledding, uphill, and backcountry will all see increases in participation.
- **In-person spending will likely continue to lag compared to the past,** while online spending will continue to increase. Brick and mortar retailers should emphasize helping customers ensure that products fit while online retailers should emphasize variety of products to drive customer traffic.
- Overall, **core participants remain excited about the upcoming season,** and most hope to increase their participation in snowsports (among other outdoor activities), if possible. However, while there could be a moderate bump in spending (particularly for non-resort activities), any increase will likely not be of the magnitude seen for bicycling and other non-winter sports seen in the spring and summer.



DETAILED RESULTS

REPORTING NOTES

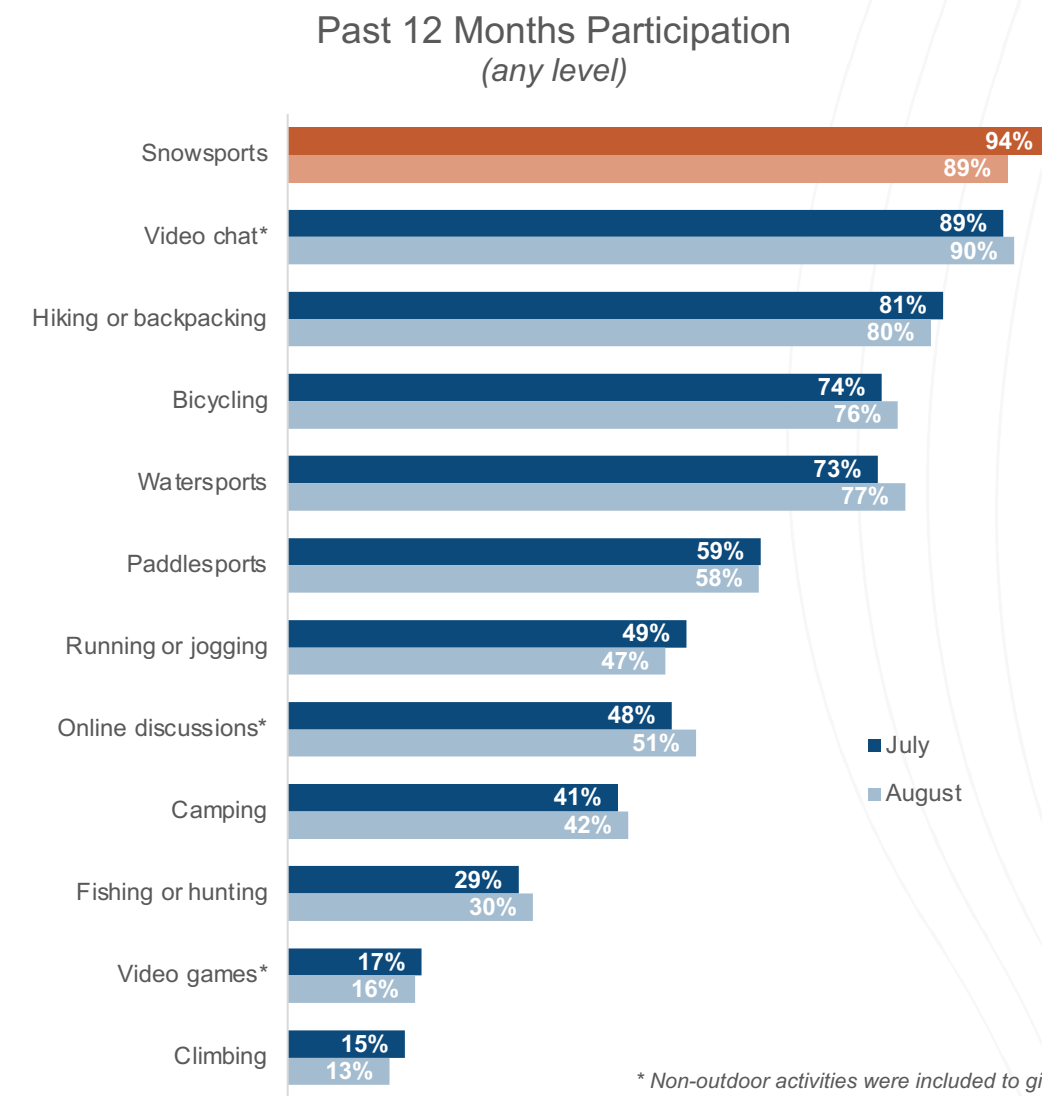
When interpreting the results of this study, it is important to consider that this is *not* a random survey of all snowsports participants. Instead, these data represent the opinions of individuals who are engaged enough in the sport to either attend snowsports expos or to be interested in communications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

Throughout this report, we refer to these respondents as “snowsports enthusiasts” in order to continuously distinguish between this group of respondents and the broader landscape of snowsports participants.

ACTIVITIES

Snowsports enthusiasts tend to have a wide variety of interests in outdoor activities

- Not surprisingly given that most respondents had attended a snow expo recently, snowsports were the most common activity for respondents with around nine in ten participating in the past 12 months.
 - While some changes were seen between July and August, these changes were generally very minor and are likely not meaningful.
- In addition to snowsports, hiking/backpacking, bicycling, watersports, and paddlesports were all popular among respondents.
- Running/jogging, camping, fishing/hunting, and climbing were all popular among smaller segments of snowsports enthusiasts.



* Non-outdoor activities were included to give context to these findings

Net Expected Change = (much/a little more) – (much/a little less)

Younger enthusiasts tend to engage in a wide variety of activities

Past 12 Months Participation
(any level)

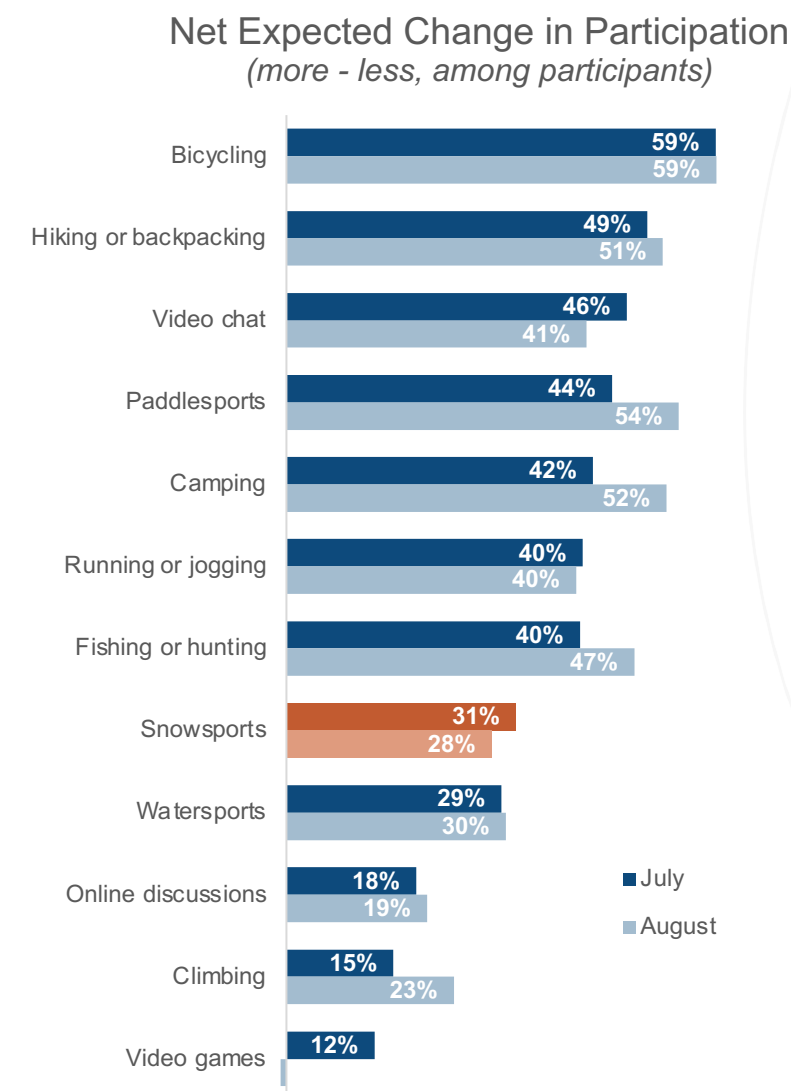
	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base	1209	281	549	175	680	379	348	692	922	97	327	210	403	683	335	66	290	421	498
Snowsports	94%	92%	96%	90%	94%	93%	94%	94%	94%	91%	91%	95%	95%	95%	94%	83%	77%	100%	100%
Video chat	89%	95%	89%	82%	88%	93%	91%	88%	89%	95%	85%	91%	93%	90%	89%	77%	88%	89%	89%
Hiking / backpacking	81%	89%	81%	64%	78%	85%	82%	80%	80%	83%	81%	77%	83%	79%	88%	67%	75%	80%	86%
Bicycling	74%	74%	74%	69%	74%	73%	75%	72%	74%	71%	68%	77%	77%	72%	77%	71%	65%	74%	79%
Watersports	73%	80%	70%	65%	68%	81%	78%	69%	73%	67%	67%	73%	78%	79%	61%	55%	64%	77%	76%
Paddlesports	59%	67%	57%	40%	51%	69%	62%	56%	59%	47%	53%	53%	64%	64%	48%	46%	49%	62%	62%
Running / jogging	49%	75%	45%	20%	46%	53%	57%	45%	48%	57%	48%	47%	53%	48%	50%	52%	47%	51%	50%
Online discussions	48%	52%	49%	39%	43%	56%	51%	47%	48%	53%	51%	49%	47%	46%	51%	50%	47%	46%	49%
Camping	41%	59%	37%	18%	37%	44%	42%	39%	40%	44%	49%	36%	38%	31%	57%	39%	38%	38%	45%
Finshing / hunting	29%	38%	27%	19%	33%	20%	36%	25%	28%	35%	27%	25%	34%	26%	36%	26%	24%	30%	30%
Video games	17%	34%	10%	4%	18%	13%	16%	17%	15%	26%	20%	18%	14%	17%	15%	17%	20%	17%	14%
Climbing	15%	25%	13%	7%	15%	15%	16%	15%	15%	22%	18%	17%	15%	14%	18%	15%	11%	15%	16%

- Participation was generally highest among respondents under age 45 and lowest among those ages 65+.
- In addition, families with children tend to be more active than those without.
- Finally, those with higher incomes tended to be more active than those with lower incomes, presumably due to the costs involved in participating in many activities.

Darker shades indicate larger numbers in each row

Participants are hoping to increase their involvement in a variety of activities

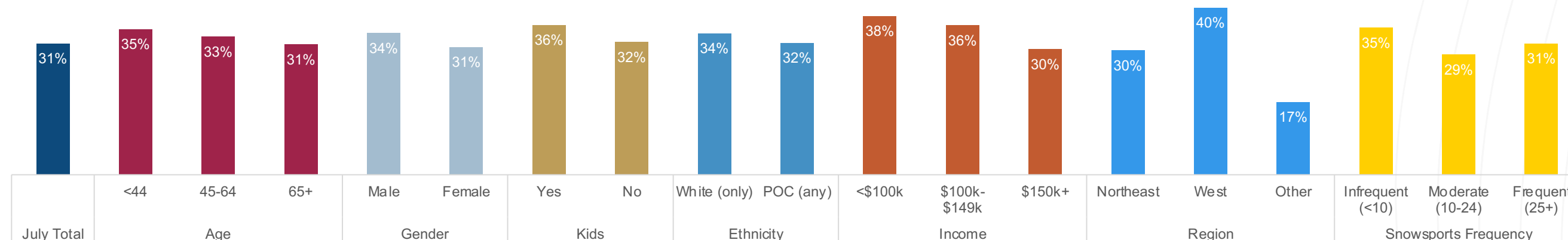
- While participants anticipated increasing their involvement in all activities in the next year, bicycling was, by far, the most anticipated increase.
 - In addition, hiking/backpacking, paddlesports, and camping are all poised to see significant growth in the next year compared to “normal.”
- While snowsports will likely not see the huge increase in participation that has been seen for bicycling, there is certainly enthusiasm for participating more than usual.
 - The difference between July and August for snowsports is too small to be considered significant.



Net Expected Change = (much/a little more) – (much/a little less)

Anticipated growth in participation is highest among those in the West

Net Expected Change in Snowsports Participation
(more - less, among participants (July only))



While the differences were relatively small, younger respondents and men tended to be more likely than their counterparts to expect to increase their participation in the next year.

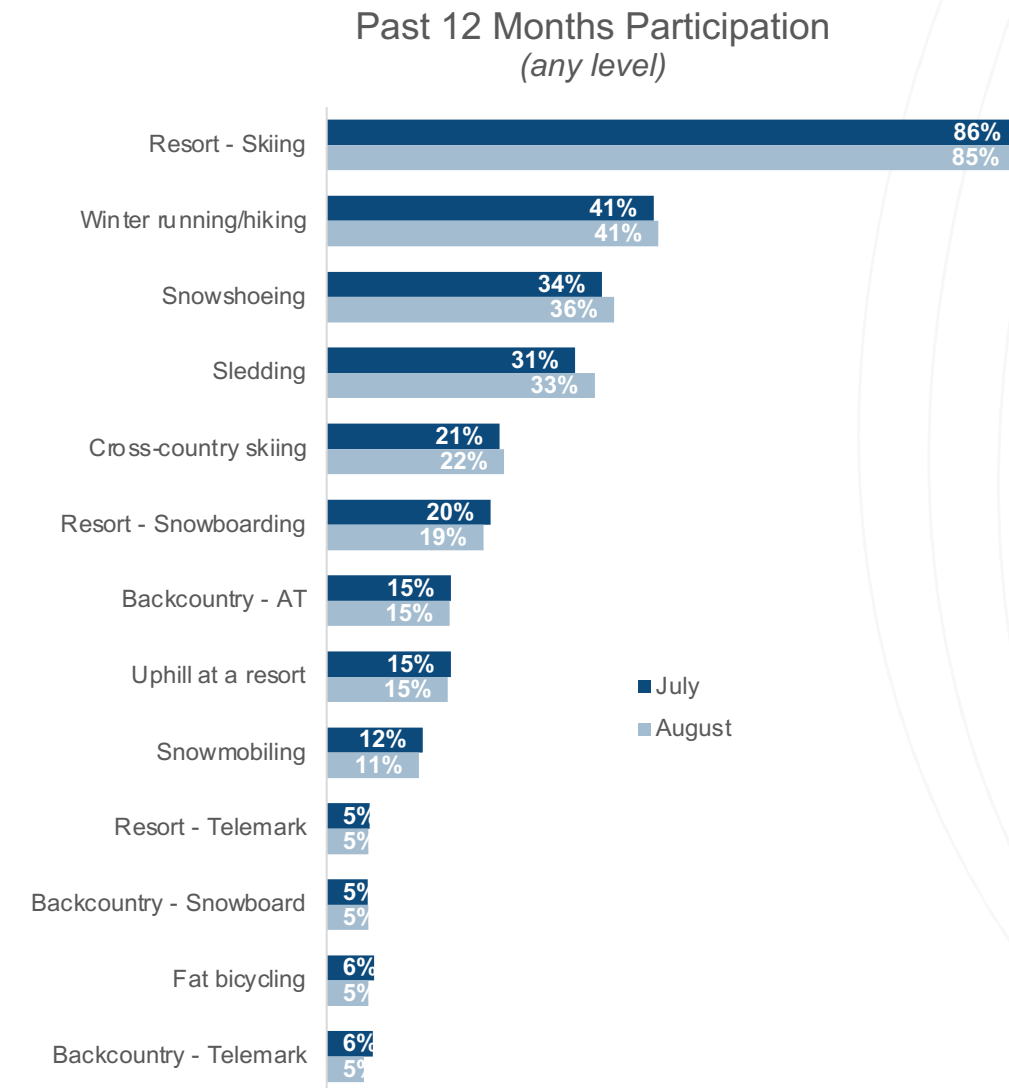
Similarly, lower-income respondents were more likely to expect to increase their participation than those with higher income levels.

Finally, it appears that enthusiasm for increasing participation is particularly high in the West, while enthusiasm in the Northeast is moderate. Those in other areas of the country were somewhat lukewarm in their expectations, likely driven by the increased amount of travel required for many in other areas to get to areas to participate in snowsports.

Net Expected Change = (much/a little more) – (much/a little less)

Nearly all enthusiasts spend at least some time at ski resorts in a typical year

- Among snowsports participants surveyed, a vast majority (85-86%) had skied at a resort in the past 12 months, while 19-20% had snowboarded at a resort (and a smaller number had uphill or telemark skied at a resort).
- The most popular off-resort winter activities were winter running/hiking, snowshoeing, sledding, and cross-country skiing.
 - These activities were not as popular as on-resort skiing, but significant portions of enthusiasts had participated in each in the past 12 months.
- Similar to the results for the broader set of activities, the changes between July and August were very minor and are likely not meaningful.



Net Expected Change = (much/a little more) – (much/a little less)

Snowsports preferences vary across segments

Past 12 Months Participation
(any level)

	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base (minimum)	1138	259	524	157	641	351	326	649	865	88	294	200	381	647	314	55	220	420	498
Resort - Skiing	86%	75%	90%	94%	88%	84%	88%	85%	87%	74%	79%	85%	91%	90%	79%	89%	78%	85%	90%
Winter running/hiking	41%	45%	43%	26%	38%	44%	45%	38%	41%	34%	38%	41%	42%	39%	45%	29%	35%	41%	42%
Snowshoeing	34%	29%	36%	42%	32%	39%	35%	35%	37%	17%	33%	34%	36%	37%	35%	13%	23%	31%	42%
Sledding	31%	40%	31%	16%	28%	36%	49%	22%	31%	25%	26%	32%	34%	34%	27%	18%	28%	32%	31%
Cross-country skiing	21%	16%	24%	29%	20%	25%	22%	22%	23%	15%	23%	21%	22%	23%	22%	16%	13%	19%	28%
Resort - Snowboarding	20%	40%	15%	6%	20%	20%	19%	21%	19%	33%	27%	22%	17%	17%	27%	16%	22%	21%	19%
Backcountry - AT	15%	14%	17%	14%	18%	10%	16%	15%	16%	18%	14%	14%	18%	12%	23%	13%	5%	10%	25%
Uphill at a resort	15%	14%	18%	16%	17%	13%	18%	16%	16%	20%	18%	14%	17%	14%	19%	13%	5%	10%	25%
Snowmobiling	12%	10%	15%	6%	12%	10%	15%	10%	12%	13%	10%	10%	15%	12%	12%	9%	8%	12%	14%
Fat tire bicycling	6%	4%	7%	5%	7%	5%	6%	6%	6%	1%	7%	5%	6%	6%	6%	7%	5%	6%	6%
Backcountry - Telemark	6%	4%	6%	6%	6%	4%	6%	5%	5%	5%	5%	7%	6%	4%	9%	5%	1%	5%	9%
Resort - Telemark	5%	4%	6%	4%	5%	6%	4%	6%	5%	9%	6%	6%	4%	4%	7%	7%	2%	3%	9%
Backcountry - Snowboard	5%	14%	3%	0%	7%	2%	3%	7%	5%	9%	8%	7%	3%	3%	9%	4%	3%	5%	7%

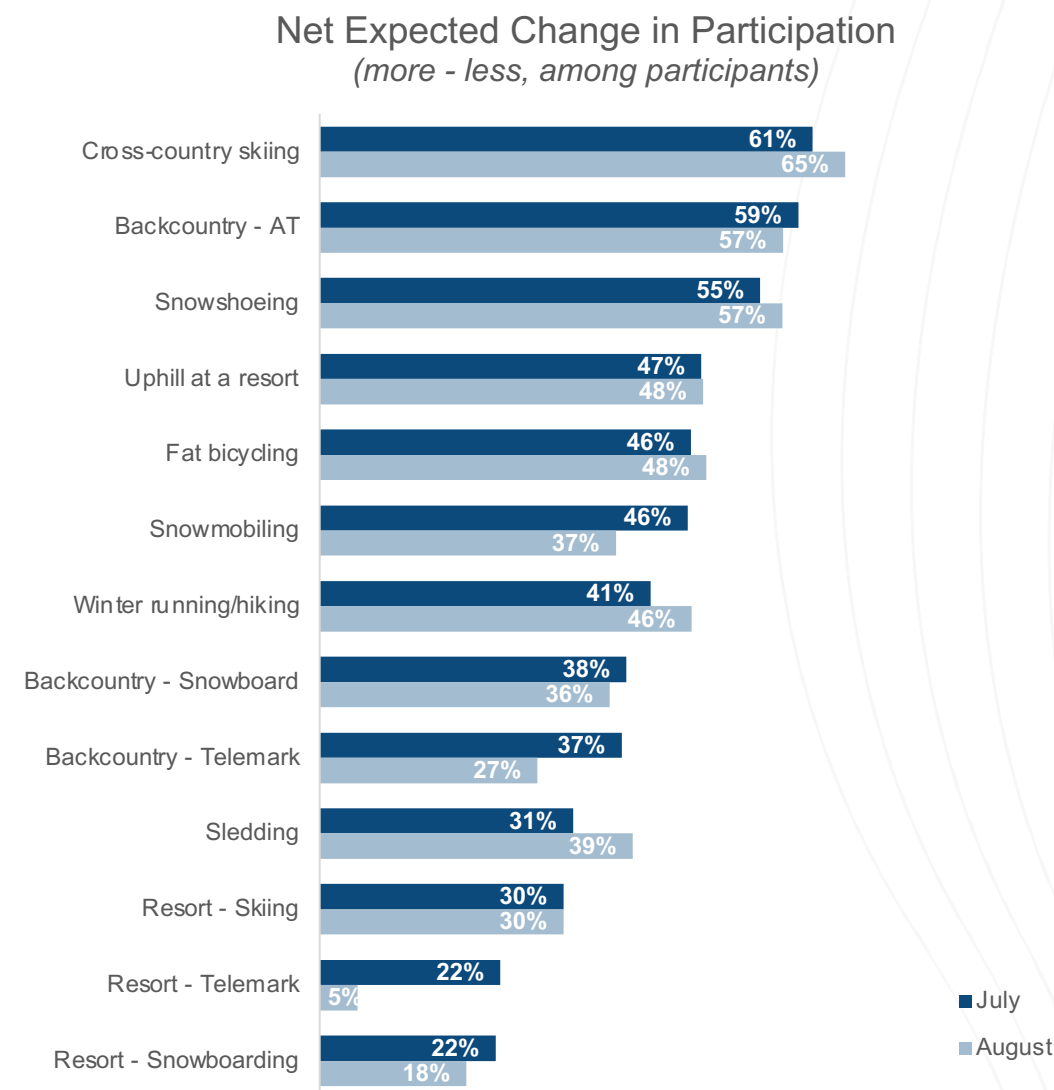
- In general, skiing (at resort), snowshoeing, and cross-country skiing tended to be more popular among older respondents, while younger respondents were more likely to participate in winter running/hiking, or snowboarding (either at resort or backcountry).
- Those in the West tend to have a wider variety of interests in snowsports, while those in the Northeast and in other areas tend to be more focused on resort skiing, specifically.

Darker shades indicate larger numbers in each row

Off-resort snowsports are poised for significant growth this season

- Participants anticipated increasing their involvement in all activities in the next year, but the most anticipated increases were seen for off-resort activities such as cross-country skiing, backcountry skiing (AT), snowshoeing, and fat tire bicycling.
- In addition, there is significant interest in increasing participation in uphill skiing at resorts.
- Not surprisingly, most resort activities will likely see modest growth this year. While some do anticipate participating more this year, any increase will likely be modest compared to off-resort activities.

Note: Analysis of this question by segment is omitted due to small sample sizes for many activities.



Net Expected Change = (much/a little more) – (much/a little less)

There is significant optimism about both on-resort and off-resort snowsports this season

- Many respondents said they would be more likely to participate in backcountry snowsports this season because they believed these activities will require less interaction with crowds and, therefore, would be safer during a pandemic.
- Not surprisingly, some noted that they were less likely to participate in snowsports at resorts due to concerns about COVID-19 and crowds. There is also concern that resorts will not even be open, so backcountry snowsports may be the only option for some.
- Even so, there is optimism among many that they will be able to participate in on-resort activities even more in the upcoming season than in the past. The two main reasons cited for this were:
 - There is hope that COVID-19 will be under control, and many want to make up for a short season last year.
 - Some have more flexibility with remote working setups. People have more flexible hours, as well as flexibility in location, which may allow some to participate more often – particularly during off-peak times such as weekdays.



If the resorts don't open or it is cumbersome to ski inbound due to pandemic precautions, I'll likely do a lot more backcountry to avoid the risk of catching the disease.



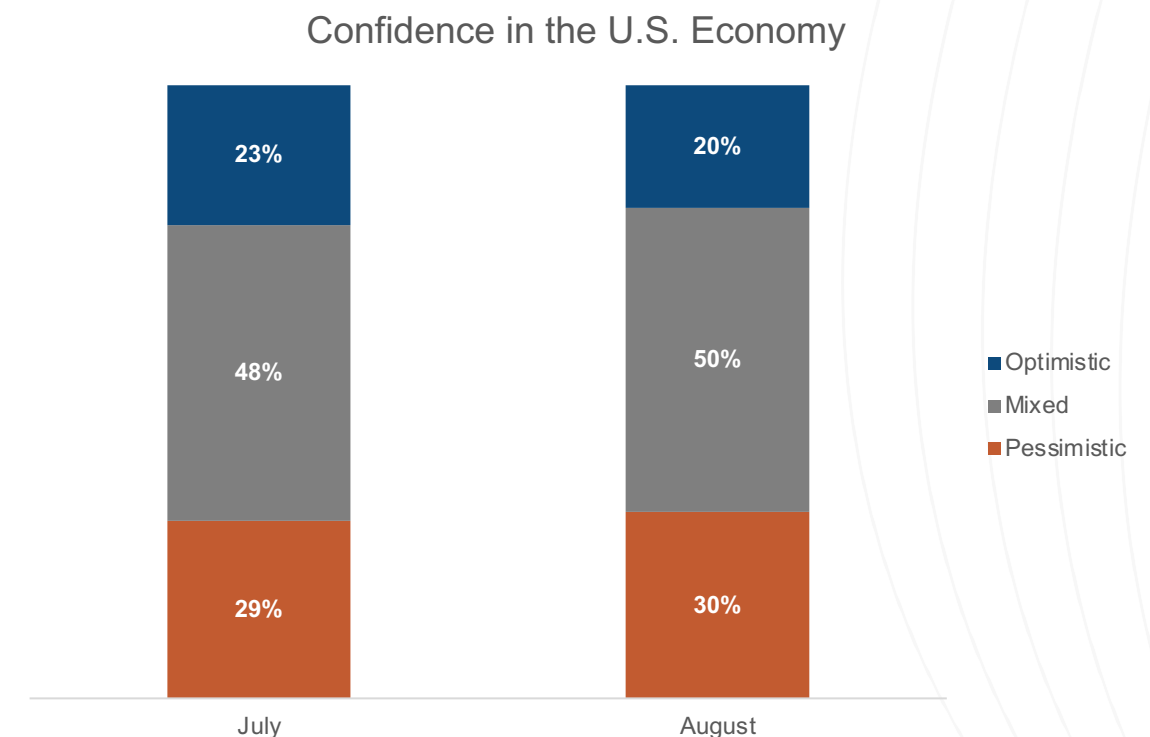
There is nothing else to do, and [skiing at a resort] feels like a safe activity where it would be easy to stay with people you know and socially distance from others.

This question was open-ended, and the most common themes are summarized here. Verbatim responses are available separately.

BROAD IMPACTS OF COVID-19

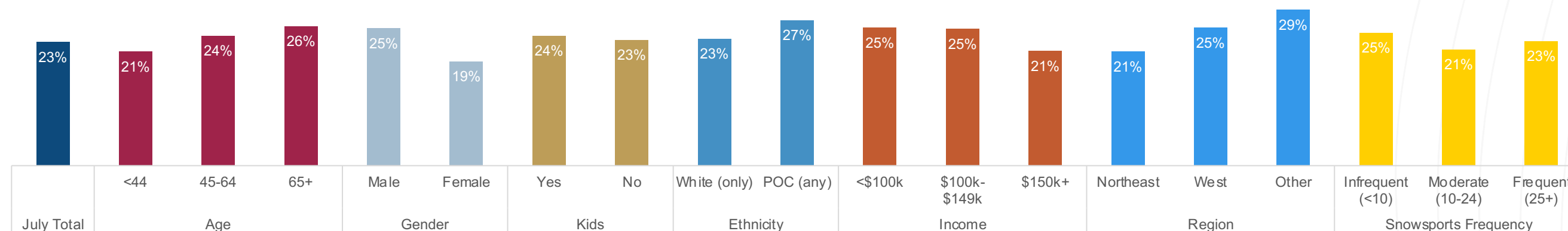
Enthusiasts are mixed in their expectations for the U.S. economy

- Roughly half of respondents were mixed in their confidence economic conditions due to COVID-19.
- The remainder were somewhat split between optimists and pessimists. Roughly three in ten were pessimistic about economic conditions, while a smaller portion (around two in ten) were optimistic.
- Overall, these results suggest a lukewarm outlook about the economy in the coming year.



Optimism in the economy is highest among older men

Confidence in the U.S. Economy
(very/somewhat optimistic - July only)



Though the differences were fairly small, older respondents were more likely to be optimistic about economic conditions than younger respondents, and men were more optimistic than women.

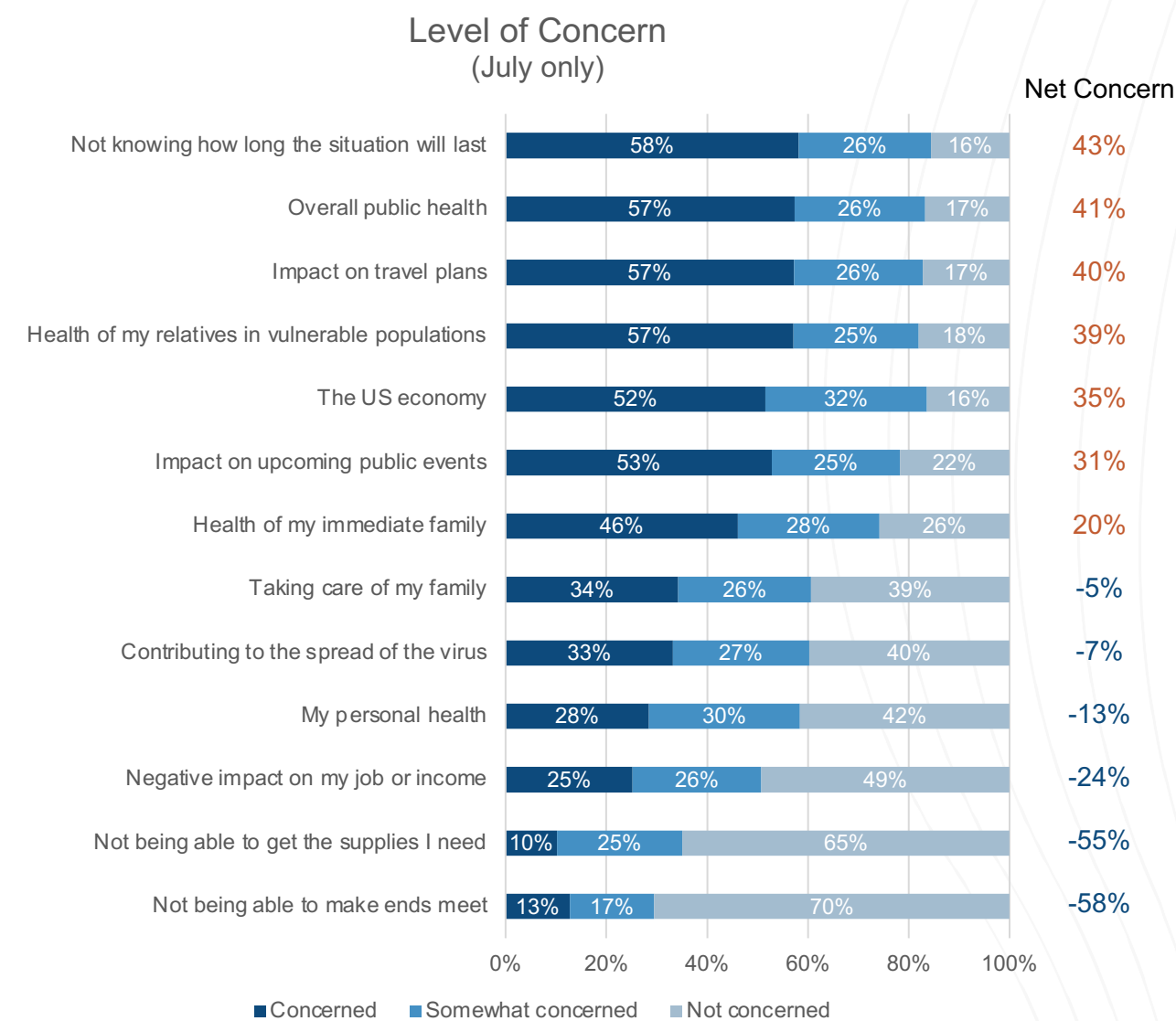
Similarly, people of color were slightly more likely to be optimistic than White respondents, and those with higher household incomes were somewhat less likely to be optimistic.

Those in the Northeast tended to have lower expectations than those in other areas.

Net Expected Change = (much/a little more) – (much/a little less)

Enthusiasts are much more concerned about broad impacts of COVID-19 than personal impacts

- Overall, the areas that respondents were most concerned about were about the broad societal impacts of COVID-19, such as not knowing how long the situation will last, overall public health, and the US economy.
- On the other hand, respondents were relatively unconcerned about being able to make ends meet, being able to get supplies, impacts on their own jobs or income, and personal health.
- Even so, respondents were somewhat concerned about personal impacts in terms of travel plans, the health of vulnerable relatives, and the health of their immediate families.



Net Concern = (extremely/very concerned) – (a little/not concerned)

Older enthusiasts and women tend to be more concerned

Level of Concern
(extremely/very concerned – July only)

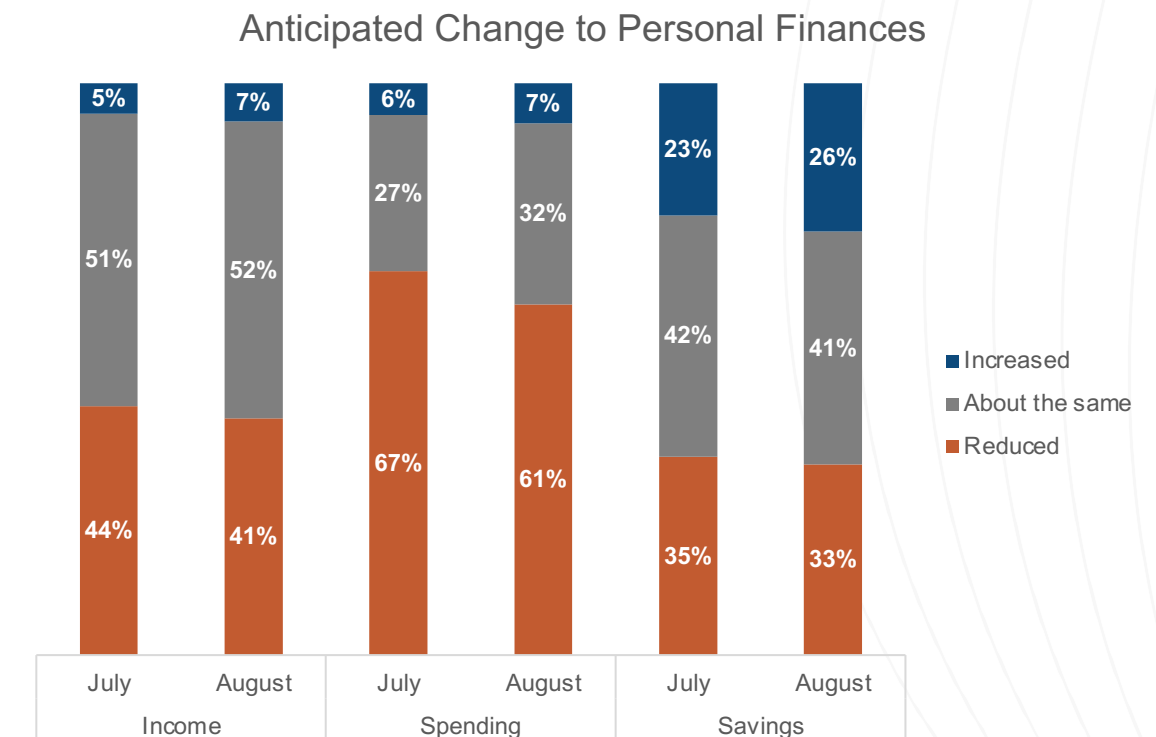
	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base (minimum)	1189	280	545	173	674	377	347	685	914	97	325	208	399	677	333	66	287	414	488
Not knowing how long the situation will last	58%	63%	56%	57%	54%	66%	58%	58%	58%	56%	62%	53%	56%	57%	61%	59%	62%	53%	60%
Overall public health	57%	55%	55%	70%	56%	63%	54%	59%	57%	63%	55%	65%	55%	59%	56%	58%	58%	56%	58%
Impact on travel plans	57%	54%	57%	61%	56%	57%	55%	58%	56%	58%	55%	54%	57%	56%	59%	52%	60%	57%	55%
Health of my relatives in vulnerable populations	57%	59%	56%	58%	56%	60%	59%	56%	57%	58%	59%	56%	55%	56%	62%	47%	56%	57%	58%
Impact on upcoming public events	53%	51%	54%	52%	52%	56%	51%	54%	53%	53%	55%	53%	51%	51%	57%	53%	56%	50%	53%
The US economy	52%	46%	53%	54%	50%	52%	55%	50%	51%	51%	44%	52%	54%	51%	52%	55%	48%	52%	53%
Health of my immediate family	46%	45%	44%	52%	46%	45%	46%	46%	45%	50%	49%	50%	40%	46%	47%	38%	46%	45%	47%
Taking care of my family	34%	31%	35%	36%	35%	32%	40%	31%	33%	36%	36%	36%	31%	32%	38%	33%	35%	33%	36%
Contributing to the spread of the virus	33%	34%	31%	42%	33%	34%	29%	36%	34%	34%	34%	39%	30%	33%	37%	27%	32%	31%	36%
My personal health	28%	22%	28%	39%	29%	28%	25%	30%	27%	38%	30%	29%	25%	28%	29%	32%	29%	28%	28%
Negative impact on my job or income	25%	30%	26%	15%	23%	27%	25%	25%	25%	30%	29%	22%	23%	23%	29%	23%	26%	22%	28%
Not being able to make ends meet	13%	14%	13%	9%	12%	13%	13%	12%	12%	20%	18%	12%	9%	11%	15%	20%	15%	10%	14%
Not being able to get the supplies I need	10%	10%	10%	9%	8%	12%	10%	10%	9%	17%	11%	11%	9%	10%	10%	9%	12%	10%	10%

- In general, older respondents tended to be more concerned about the broad impacts of COVID-19 in areas such as public health, the economy, travel plans, and personal health while younger respondents were more concerned about not knowing how long the situation will last. Women also tended to be more concerned in most areas compared to men.

Darker shades indicate larger numbers in each row

Income and spending will likely decline while savings will likely remain relatively stable

- Overall, a majority of respondents (61-67%) said that they expected their spending to decline in the next year, and a significant portion (41-44%) expected their income to decline.
- Around one-third (33-35%) expected their savings to be reduced in the next year, but nearly as many (23-26%) expected to increase their savings.
- Perceptions were very similar between July and August, but there was a slight decline in the percentage of respondents who expected to reduce their spending, which suggests that perceptions have improved very slightly regarding anticipated spending.



Perceptions about financial impacts are linked to income

Anticipated Change to Personal Finances
(reduced – July only)

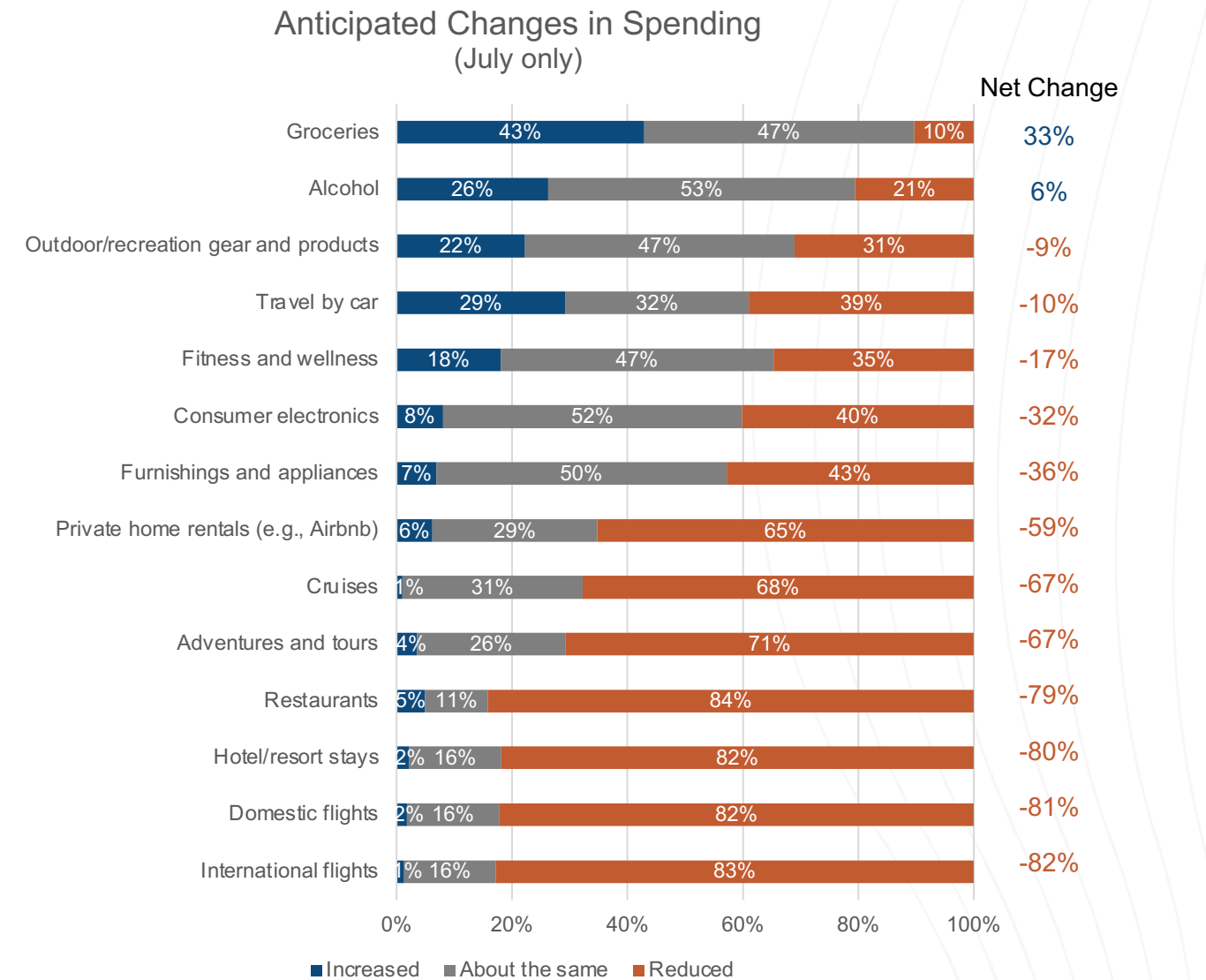
	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base (minimum)	1176	277	541	169	667	373	342	680	904	97	323	207	394	670	329	64	286	409	481
Income	44%	40%	48%	40%	43%	46%	47%	43%	44%	39%	48%	44%	40%	43%	47%	45%	45%	35%	50%
Spending	67%	68%	70%	58%	65%	72%	67%	68%	69%	55%	68%	66%	66%	66%	69%	65%	66%	66%	69%
Savings	35%	32%	37%	32%	33%	37%	34%	35%	33%	43%	44%	35%	28%	34%	37%	39%	39%	27%	38%

- In general, respondents from the various segments tended to have similar perceptions about the personal financial impacts of COVID-19.
- However, those with lower income levels tended to be more concerned about the impacts on income and savings compared to their higher-income counterparts. Interestingly, lower-income respondents were not any more concerned about reductions to spending than higher-income respondents.

Darker shades indicate larger numbers in each row

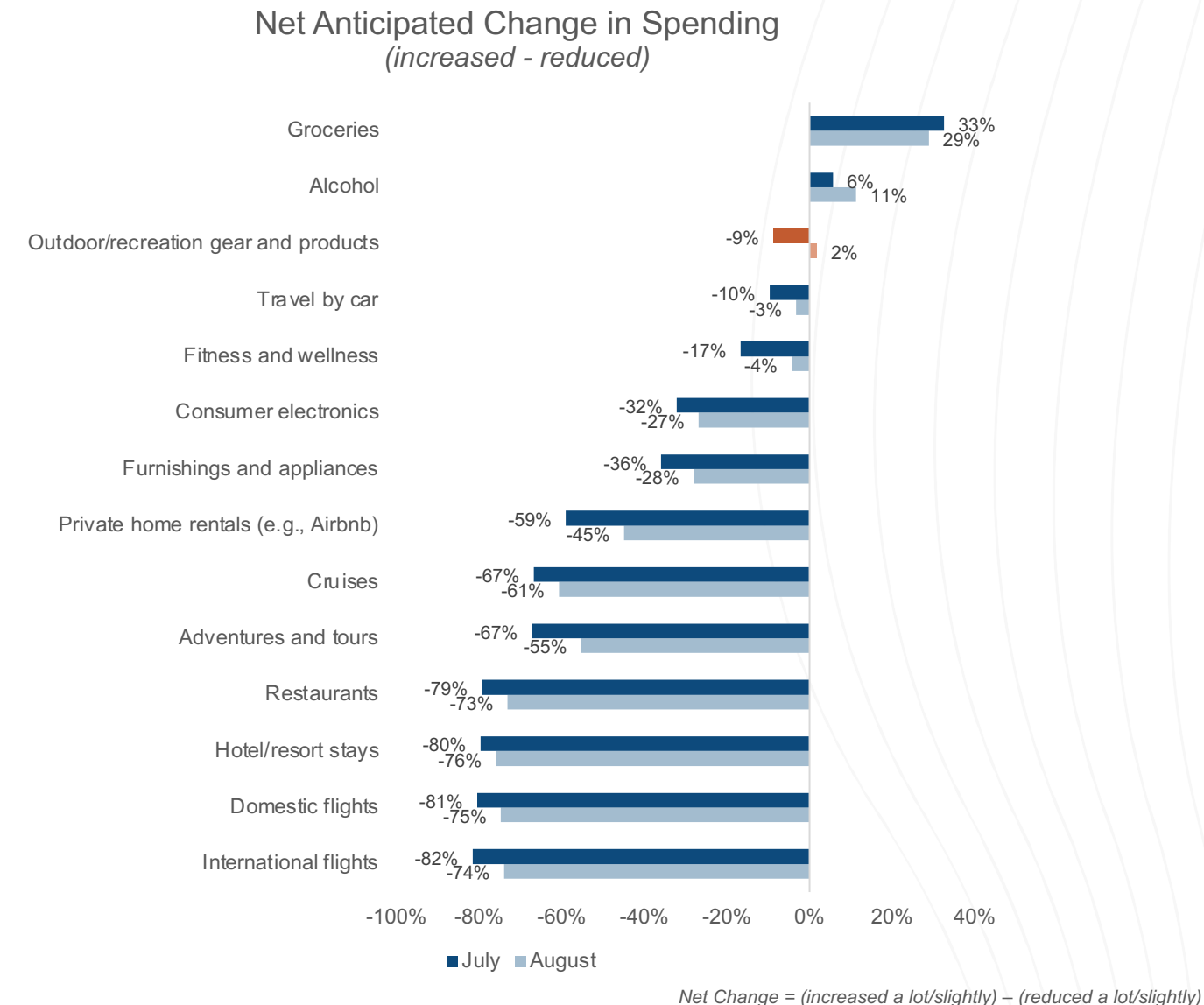
Travel spending will likely decline significantly, but outdoor spending will be relatively stable

- A vast majority expected their travel spending to decline in the next year due to COVID-19. In particular, respondents largely expected to reduce their spending on domestic and international flights, hotel/resort stays, and restaurants.
- Declines in spending on adventures and tours, cruises, and private home rentals will also be significant, but perhaps less so than the areas listed above. These types of experiences can often be somewhat more isolated than others which likely results in a reduced perception of risk.
- The good news for outdoor/recreation brands is that, while respondents as a whole did expect to reduce their spending in the category, these reductions were far smaller than those seen in other areas.



Anticipated impacts on spending improved slightly between July and August

- For nearly all of the spending categories addressed in the survey, the net anticipated change in spending improved between July and August. This suggests that perceptions about the impacts of COVID-19 improved slightly between the two survey waves.
- With regard to spending on outdoor products specifically, respondents in August were nearly evenly divided between those who expected to decrease their spending and those who expected to increase their spending.
- With regard to segments, younger people, families with children, higher-income respondents, and frequent snowsports participants were all more optimistic about their spending than their counterparts (see [the following page](#)).



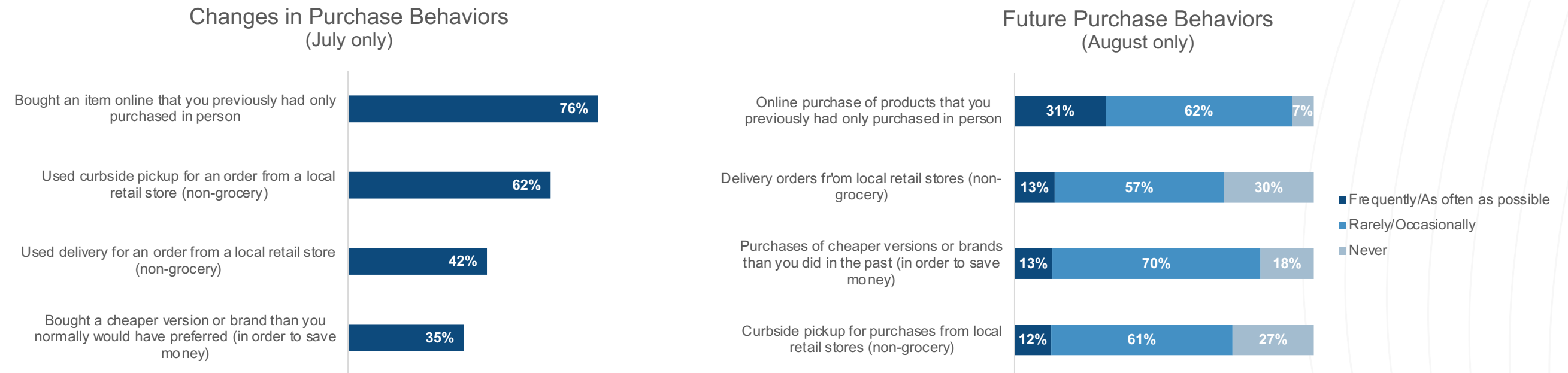
Younger people, families with children, higher-income respondents, and frequent snowsports participants are more optimistic about outdoor spending

Net Anticipated Change in Spending
(increased – reduced, July only)

	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base (minimum)	1158	281	536	169	663	374	346	673	903	96	325	204	395	665	332	64	286	396	476
Groceries	33%	45%	31%	25%	31%	38%	35%	33%	34%	35%	22%	33%	42%	33%	34%	27%	24%	43%	29%
Alcohol	6%	24%	4%	-15%	5%	10%	11%	4%	8%	-3%	-6%	6%	19%	8%	3%	-2%	1%	14%	2%
Outdoor/recreation gear and products	-9%	3%	-9%	-29%	-11%	-7%	0%	-14%	-7%	-25%	-11%	-19%	-3%	-9%	-9%	-23%	-19%	-6%	-5%
Travel by car	-10%	0%	-9%	-23%	-11%	-8%	-8%	-11%	-11%	1%	-14%	-13%	-3%	-16%	-3%	-3%	-11%	-12%	-7%
Fitness and wellness	-17%	-11%	-17%	-21%	-14%	-22%	-17%	-16%	-16%	-21%	-12%	-16%	-17%	-22%	-9%	-9%	-20%	-17%	-15%
Consumer electronics	-32%	-22%	-34%	-38%	-32%	-31%	-31%	-32%	-32%	-23%	-42%	-30%	-25%	-29%	-38%	-27%	-36%	-26%	-35%
Furnishings and appliances	-36%	-28%	-39%	-39%	-36%	-33%	-38%	-34%	-35%	-40%	-44%	-31%	-32%	-33%	-39%	-41%	-41%	-33%	-35%
Private home rentals (e.g., Airbnb)	-59%	-56%	-60%	-68%	-60%	-61%	-58%	-61%	-60%	-56%	-60%	-65%	-59%	-57%	-67%	-64%	-58%	-58%	-62%
Cruises	-67%	-63%	-64%	-77%	-66%	-66%	-65%	-67%	-66%	-63%	-64%	-72%	-66%	-70%	-59%	-58%	-66%	-65%	-69%
Adventures and tours	-67%	-61%	-66%	-78%	-65%	-70%	-65%	-67%	-67%	-58%	-62%	-71%	-67%	-70%	-61%	-62%	-66%	-66%	-69%
Restaurants	-79%	-77%	-80%	-82%	-80%	-80%	-82%	-79%	-80%	-73%	-76%	-82%	-81%	-83%	-77%	-61%	-74%	-81%	-81%
Hotel/resort stays	-80%	-81%	-80%	-76%	-78%	-83%	-78%	-80%	-81%	-67%	-76%	-81%	-82%	-81%	-77%	-79%	-75%	-81%	-81%
Domestic flights	-81%	-80%	-79%	-81%	-79%	-83%	-79%	-80%	-81%	-72%	-76%	-80%	-84%	-80%	-80%	-80%	-78%	-82%	-81%
International flights	-82%	-81%	-80%	-89%	-81%	-83%	-80%	-83%	-82%	-75%	-80%	-80%	-85%	-84%	-79%	-73%	-79%	-81%	-84%

Darker shades indicate larger numbers in each row

There will likely be a long-term shift toward more online spending



- Around three-fourths of respondents (76%) bought an item online due to COVID-19 that they had previously only purchased in person, and around one-third (31%) said that they will at least “frequently” do after the COVID-19 situation has subsided. While this does not suggest a full shift toward online shopping, it is clear that the pandemic has resulted in many becoming more comfortable with online shopping. This will likely have long-term impacts on brick-and-mortar retailers.
- Many had also used curbside pickup or delivery from local stores, and some had shifted their spending toward discount brands, but these impacts will likely be less significant in the long-term than the broader shift toward online shopping.

People of all ages have tried online shopping

Changes in Purchase Behaviors
(July only)

	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base (minimum)	1174	279	548	174	676	378	348	688	918	97	326	209	401	679	335	65	286	405	483
Bought an item online that you previously had only purchased in person	76%	75%	77%	73%	75%	78%	81%	73%	76%	72%	70%	79%	78%	78%	73%	65%	76%	79%	74%
Used curbside pickup for an order from a local retail store (non-grocery)	62%	69%	61%	54%	62%	62%	71%	58%	62%	68%	62%	60%	64%	62%	61%	58%	62%	65%	59%
Used delivery for an order from a local retail store (non-grocery)	42%	59%	37%	30%	41%	43%	47%	39%	41%	55%	41%	41%	46%	43%	40%	33%	43%	46%	39%
Bought a cheaper version or brand than you normally would have preferred (in order to save money)	35%	45%	34%	21%	33%	39%	39%	33%	33%	53%	43%	32%	32%	32%	40%	38%	37%	36%	34%

- Respondents from all age groups have ordered items online that they had previous only purchased in-store, so openness to trying out online shopping is not necessarily only for younger age groups. However, families with kids and moderate-to-high income households were more likely to do so than their counterparts.
- On the other hand, younger people were more likely to try curbside pickup or delivery from local stores than older people, and they were also more open to shifting their spending toward discount products.

Darker shades indicate larger numbers in each row

Higher-income households are more interested in online and delivery options in the future

Future Purchase Behaviors
(frequently/as often as possible – August only)

	August Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base (minimum)	1111	266	605	159	670	392	359	694	950	89	313	202	438	620	377	77	349	383	379
Online purchase of products that you previously had only purchased in person	31%	27%	32%	30%	30%	32%	33%	29%	31%	34%	21%	28%	38%	30%	31%	27%	29%	30%	33%
Delivery orders from local retail stores (non-grocery)	13%	16%	12%	15%	13%	15%	13%	13%	13%	16%	8%	13%	18%	13%	13%	13%	12%	13%	15%
Purchases of cheaper versions or brands than you did in the past (in order to save money)	13%	18%	12%	8%	11%	15%	14%	12%	12%	20%	19%	13%	8%	12%	13%	14%	16%	11%	12%
Curbside pickup for purchases from local retail stores (non-grocery)	12%	19%	11%	5%	12%	14%	15%	11%	12%	19%	7%	16%	14%	12%	13%	10%	13%	10%	14%

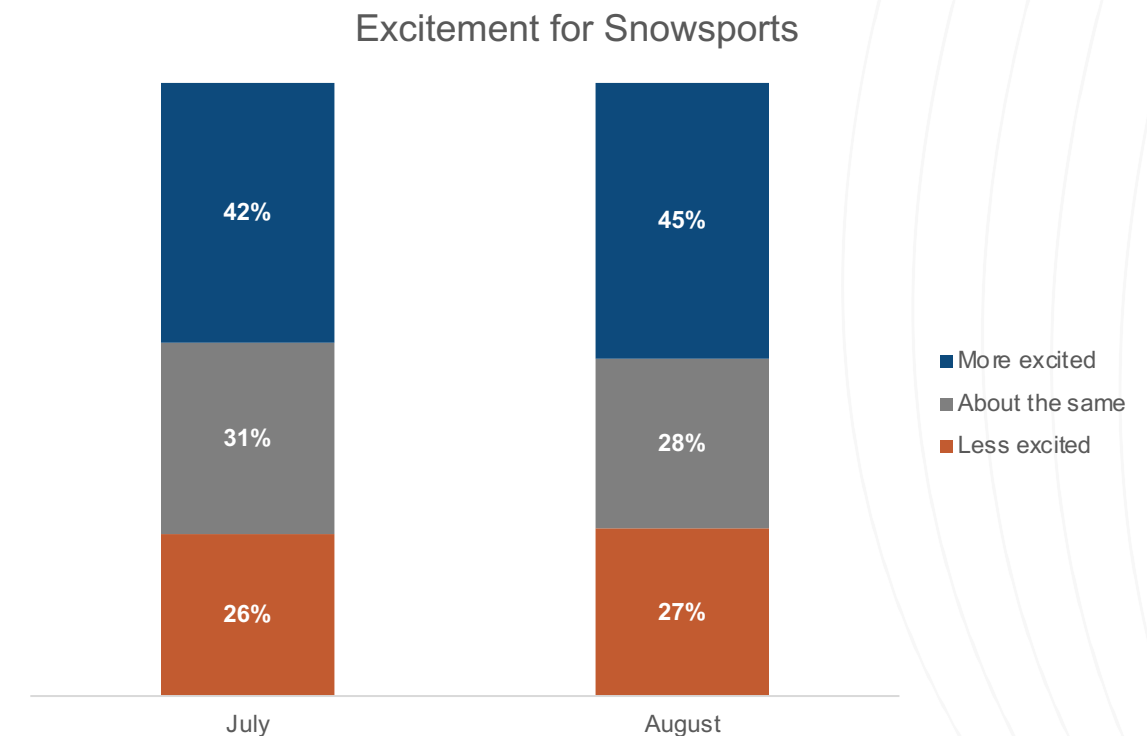
- In the future, 38% of households with incomes of \$150k or higher said that they would at least “frequently” purchase products online that they had previously only purchased in person – nearly double the portion of lower-income households (21%) who said that they would do so. This could suggest an increasing market for high-end product purchases online.
- Similar to the trend seen with regard to [recent experiences](#), younger respondents were more likely than others to be interested in curbside pickup and discount brands compared to their older counterparts.

Darker shades indicate larger numbers in each row

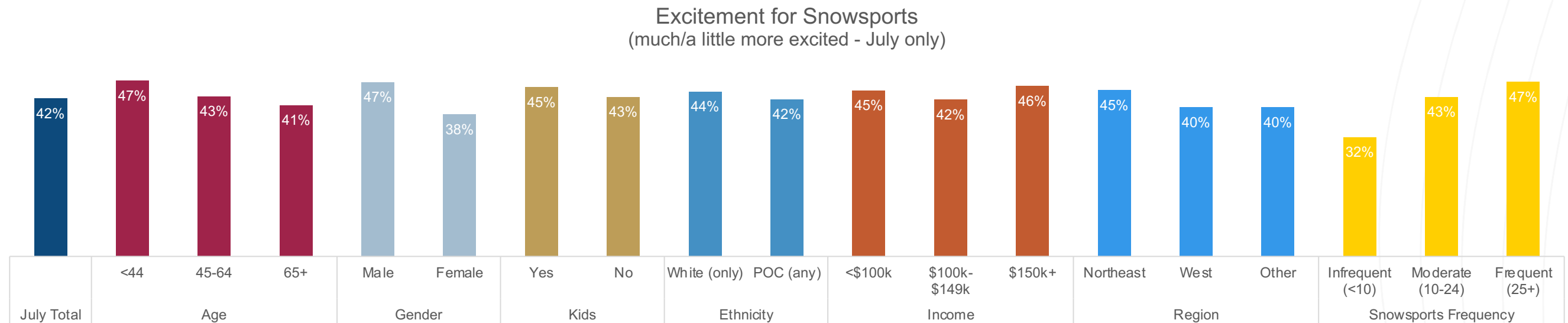
IMPACTS ON SNOWSPORTS

Despite the challenges, enthusiasts are generally more excited for snowsports than usual

- On the whole, respondents were more likely to be “more excited” for the coming season than “less excited.”
- Though the difference was slight, excitement increased a bit between July and August, suggesting that excitement is likely growing as we get closer to the beginning of the season.



Younger, more frequent participants are particularly excited for snowsports



While a significant portion of all segments were excited about the upcoming season, younger people, men, and frequent participants were more likely than their counterparts to be excited about the season. This suggests a lot of energy among core participants to get out and be active this season.

Net Expected Change = (much/a little more) – (much/a little less)

There is significant optimism about both on-resort and off-resort snowsports this season

- Many respondents noted they were excited to engage in snowsports this year due to the prior year being cut short.
 - For many respondents, there is a desire to engage in snowsports more often to make up for the shortened 2019-2020 season.
 - Snowsports are also perceived to offer a safe environment since they are outside and, therefore, come with less risk of COVID-19 spread or outbreaks than other types of activities.
- However, some are still fearful that COVID-19 may make on-resort snowsports risky, especially during weekends or holidays.
 - Many are worried about going into the lodge or other closed, confined spaces.
 - Others noted that, if they did go to a resort for snowsports, they would likely bring their own food, avoid rentals and the lodge, and gear up in their cars to avoid crowds.
 - Additionally, some respondents noted they are uncertain of how admittance to resorts will be handled. Some worry that, despite having a season pass, they will not have unlimited access.

“

I am very anxious to get on my skis again since the 2020 season was cut short! I believe any outdoor recreational activity is beneficial to the mind, body, and soul! I am spending a lot more time outside than I ever have before!

“

Hopefully ski resorts will be able to open and implement COVID-19 safety precautions, (e.g., not fill chairs with people not in group and require face coverings and social distancing in lines and common areas).

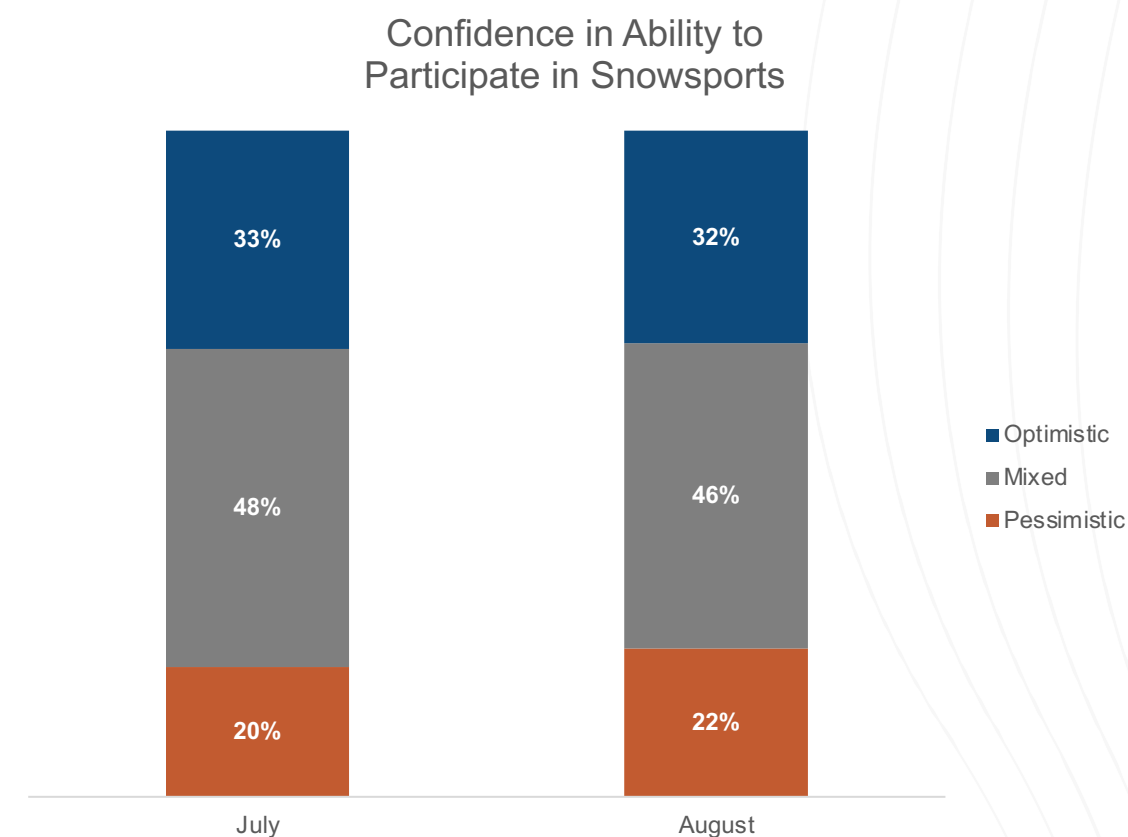
“

Expect less opportunities with capacity limited at resorts. Also worry about people taking the virus seriously if I am able to participate.

This question was open-ended, and the most common themes are summarized here. Verbatim responses are available separately.

Enthusiasts are more optimistic than pessimistic that they will be able to participate in snowsports as much as they desire

- In general, respondents were somewhat mixed in their confidence that they will be able to participate in snowsports as much as they'd like this season with around half of respondents (46-48%) saying that they were only “a little optimistic” or “a little pessimistic” about the season.
- Among those who had stronger perceptions about the season, however, respondents were more likely to be optimistic about the season than pessimistic.
- Confidence remained steady from July to August.



Higher-income enthusiasts are less optimistic about the season

Confidence in Ability to Participate in Snowsports
(very/somewhat optimistic - July only)



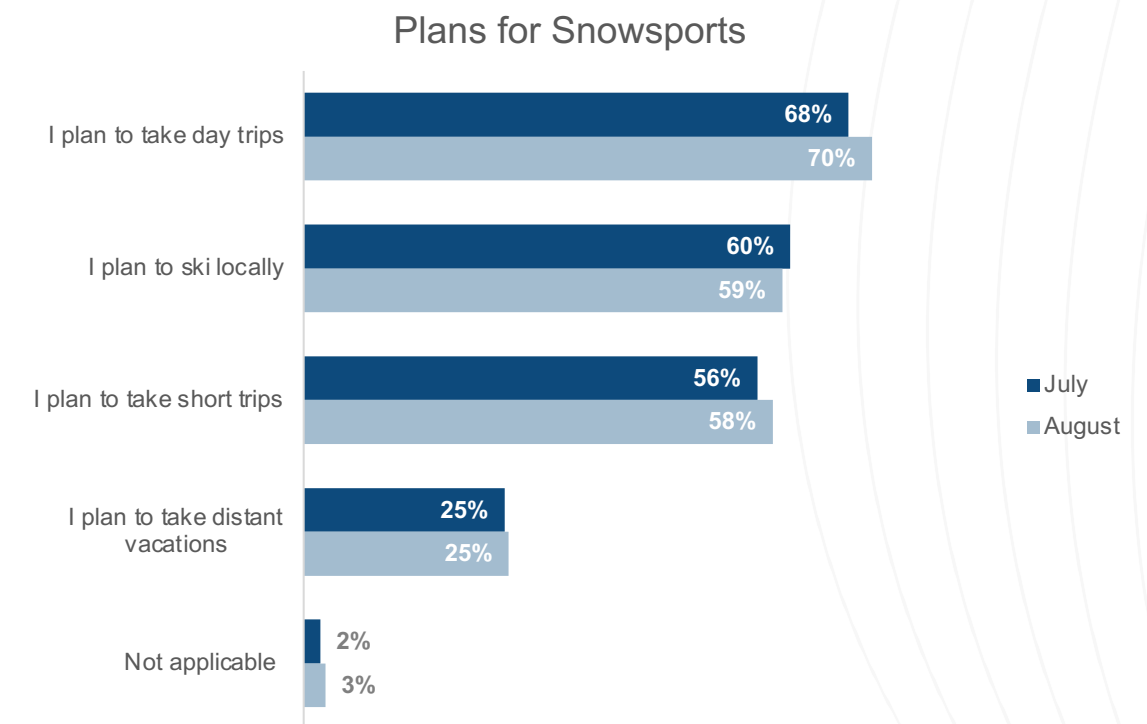
Members of all segments were more likely to be optimistic than pessimistic about the season.

Higher-income respondents were less likely to be optimistic than lower-income respondents. One possible explanation is that higher-income individuals might be more active in a typical year (since they can more easily travel and purchase products for a variety of activities), so they may be less optimistic that they'll be able to match that desired level of activity.

Net Expected Change = (much/a little more) – (much/a little less)

There will likely be an emphasis on local participation in the 2020-21 season

- Relatively few respondents expected to take distant vacations in the upcoming season, but a majority said that they will participate through short trips, day trips, or local skiing.
- While not surprising, this suggests a general aversion to traveling, but people will still try to participate near their homes this year.
- Plans largely remained consistent between July and August.



Plans are likely driven strongly by proximity to ski areas

Plans for Snowsports
(July only)

	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base	1105	259	525	158	642	352	325	651	867	88	295	200	381	647	315	55	217	403	485
I plan to take day trips	68%	76%	67%	60%	71%	64%	68%	68%	68%	69%	70%	71%	66%	68%	72%	56%	68%	74%	62%
I plan to ski locally	60%	58%	60%	66%	61%	59%	60%	60%	61%	55%	59%	60%	61%	58%	67%	51%	41%	53%	75%
I plan to take short trips	56%	61%	56%	52%	58%	53%	54%	58%	57%	56%	55%	52%	63%	59%	52%	56%	50%	62%	54%
I plan to take distant vacations	25%	21%	27%	24%	27%	20%	19%	28%	25%	30%	21%	22%	30%	26%	19%	46%	14%	24%	31%

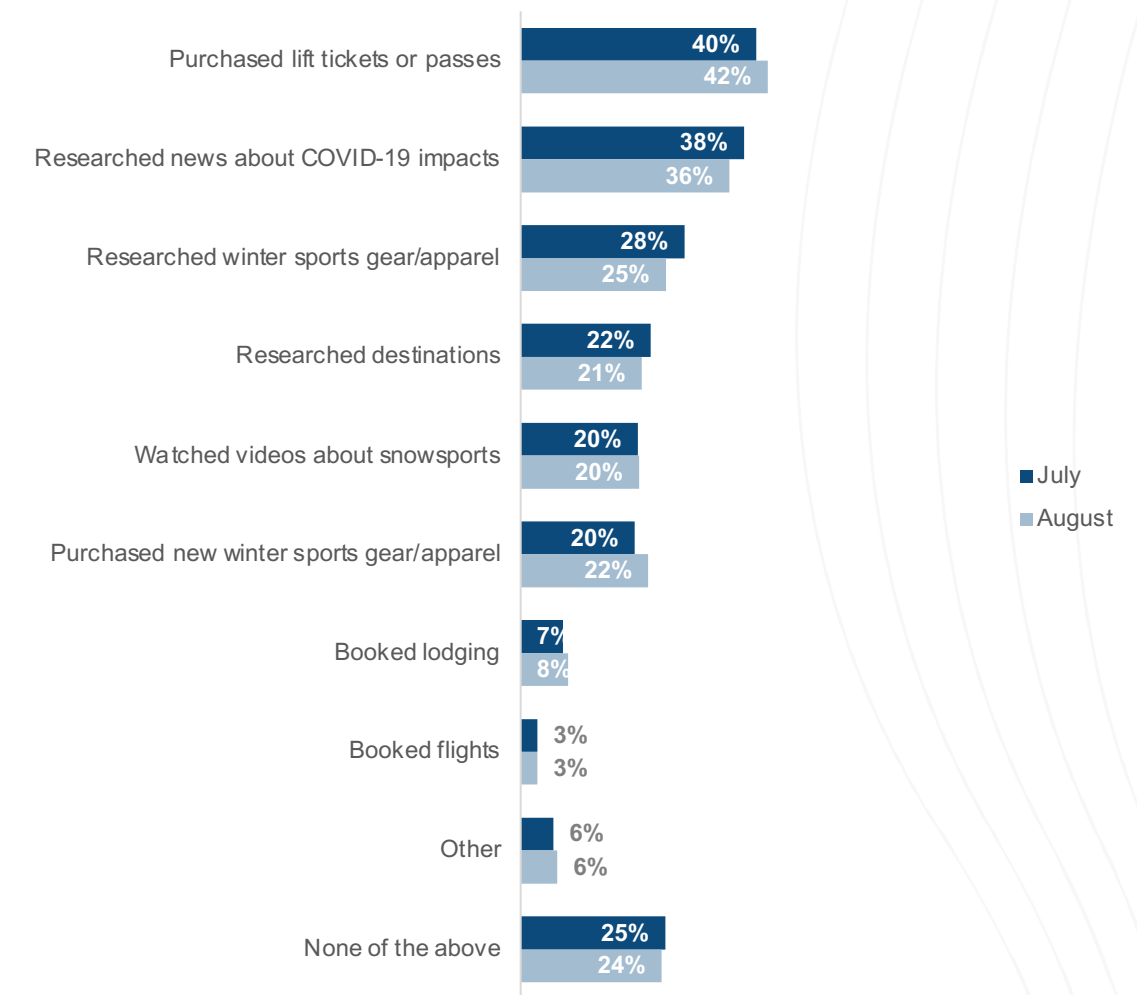
- Older respondents and frequent participants were more likely than their counterparts to say that they would ski locally.
 - This is likely simply driven by these two segments being more likely to live near ski areas than others.
- Younger respondents and moderate participants, on the other hand, were more likely to take day trips or short trips.
- Though the sample size was very small, it is interesting to note that respondents from “other” regions were much more likely than others to say they would take distant vacations.
 - While this is almost certainly driven by the fact that those who live in other areas are less likely to have easy access to nearby ski areas, this does suggest that there is still energy among people outside of the West and Northeast to participate in snowsports this year.

Darker shades indicate larger numbers in each row

Most enthusiasts have taken at least some actions to prepare for the upcoming season

- Roughly three-fourths of respondents (75-76%) have taken at least one action to prepare for the season.
- Around two in five (40-42%) have purchased lift tickets or passes, and only around one in five (20-22%) have purchased gear or apparel.
- However, many have at least researched news about COVID-19's impacts, researched gear or apparel, researched destinations, or watched videos about snowsports.
- Very few have actually booked lodging or flights.
- The results from July and August were fairly stable, but respondents were very slightly more likely to have made purchases in August compared to July.

Actions Taken to Prepare for the Season



Younger enthusiasts are more likely to do research to prepare, but many haven't actually bought lift tickets or passes

Actions Taken to Prepare for the Season
(July only)

	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base	1103	259	524	158	642	351	325	651	867	87	296	200	380	647	315	55	216	403	484
Purchased lift tickets or passes	40%	35%	42%	46%	43%	36%	39%	41%	41%	38%	37%	37%	47%	37%	49%	33%	17%	40%	52%
Researched news about COVID-19 impacts	38%	46%	35%	38%	41%	34%	38%	39%	39%	36%	41%	43%	36%	39%	39%	36%	29%	38%	43%
Researched winter sports gear/apparel	28%	41%	24%	22%	31%	23%	31%	28%	28%	35%	30%	30%	29%	29%	28%	24%	22%	25%	34%
Researched destinations	22%	26%	20%	20%	25%	17%	20%	23%	22%	30%	18%	25%	25%	24%	19%	29%	19%	22%	24%
Watched videos about snowsports	20%	32%	18%	15%	25%	13%	24%	19%	21%	18%	22%	17%	23%	22%	17%	24%	12%	18%	26%
Purchased new winter sports gear/apparel	20%	26%	17%	17%	20%	17%	21%	19%	19%	22%	20%	21%	20%	20%	21%	20%	11%	15%	28%
Booked lodging	7%	6%	7%	9%	8%	6%	7%	7%	7%	7%	4%	7%	9%	8%	5%	13%	4%	8%	8%
Booked flights	3%	2%	3%	2%	3%	2%	3%	3%	3%	2%	1%	3%	5%	3%	3%	4%	2%	3%	4%

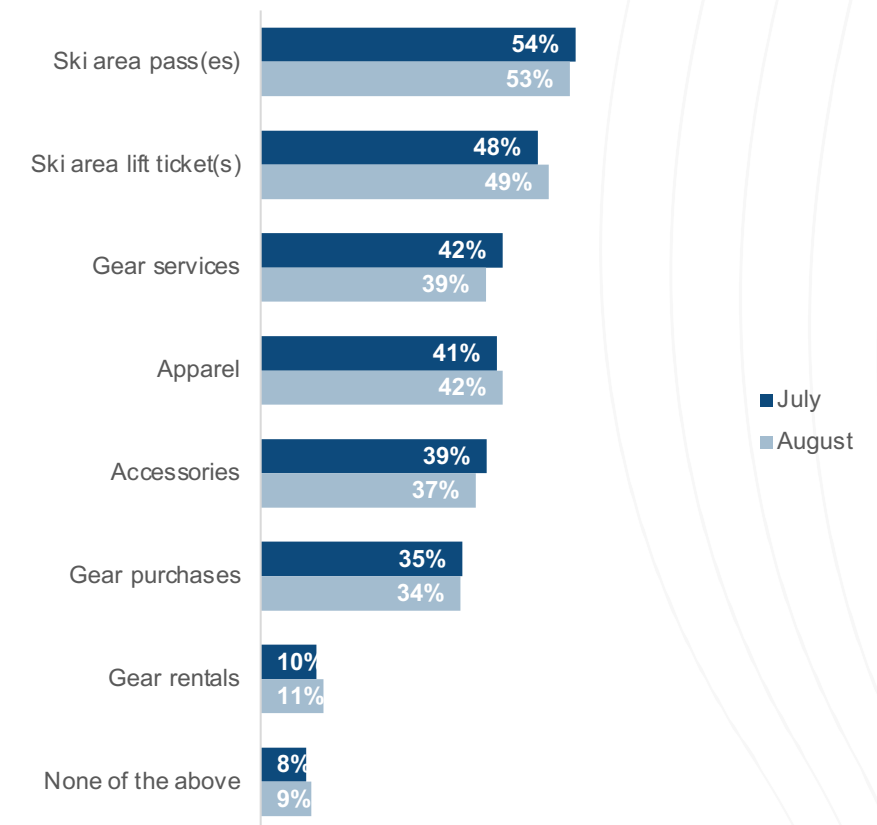
- Not surprisingly, frequent participants were more likely to have taken nearly all actions compared to less-frequent participants.
- Interestingly, older respondents were more likely than younger respondents to have purchased tickets or passes, but younger respondents were more likely to have taken nearly all other types of actions.

Darker shades indicate larger numbers in each row

Nine in ten enthusiasts plan to make at least some form of snowsports purchases this year

- Not surprisingly, the most common purchasers that respondents expected to make this year were passes and lift tickets to ski areas.
- Gear services, apparel, accessories, and gear purchases were all in the plans of a significant portion of respondents, while relatively few expected to rent any gear. (It is important to remember that this survey was aimed at an active group of participants, so it is likely that many simply don't have a need for rentals.)
- Results were very similar between July and August.

Anticipated Types of Purchases



Younger participants and families are more likely purchase gear, apparel, and accessories

Anticipated Types of Purchases
(July only)

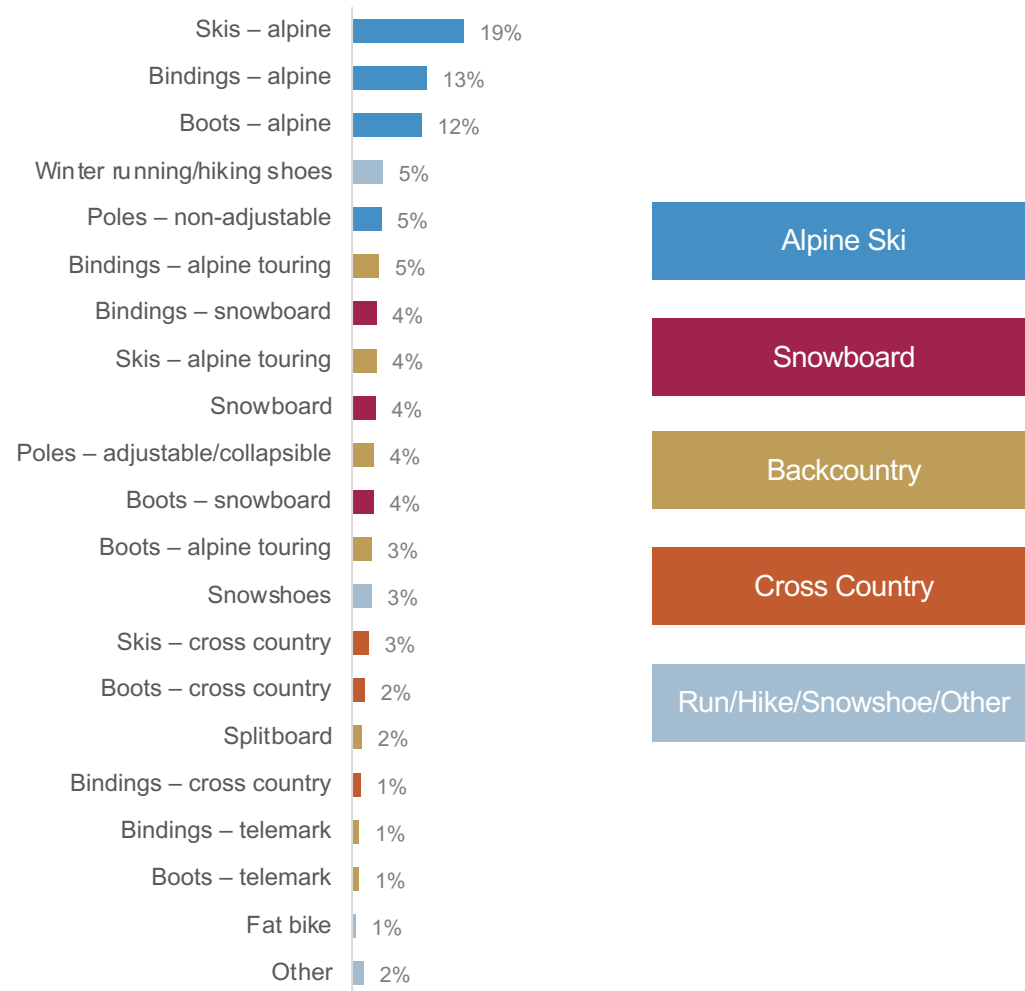
	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base	1100	259	523	158	641	351	326	649	865	88	296	200	380	647	314	55	216	401	483
Ski area pass(es)	54%	55%	54%	56%	57%	51%	59%	52%	55%	52%	50%	54%	61%	50%	67%	42%	31%	53%	65%
Ski area lift ticket(s)	48%	49%	48%	42%	48%	47%	49%	46%	47%	49%	42%	48%	49%	55%	30%	66%	62%	51%	38%
Gear services	42%	38%	44%	42%	44%	39%	42%	42%	43%	36%	37%	41%	45%	44%	40%	27%	29%	40%	48%
Apparel	41%	46%	41%	33%	42%	39%	51%	36%	42%	39%	39%	42%	44%	41%	41%	40%	26%	38%	49%
Accessories	39%	43%	38%	38%	42%	35%	45%	36%	40%	38%	41%	40%	39%	39%	40%	40%	23%	38%	47%
Gear purchases	35%	40%	36%	29%	39%	29%	41%	33%	37%	28%	33%	36%	39%	36%	35%	33%	19%	33%	43%
Gear rentals	10%	10%	11%	5%	10%	11%	18%	6%	9%	11%	7%	11%	11%	9%	10%	15%	11%	11%	8%

- Compared to respondents ages 65+, those who were under age 45 were considerably more likely to plan to purchase apparel, accessories, and gear this year.
- Similarly, families with kids were more likely to make essentially all types of purchases than those without.
 - This is likely driven by the need for new gear as kids continue to grow and evolve in their interests.

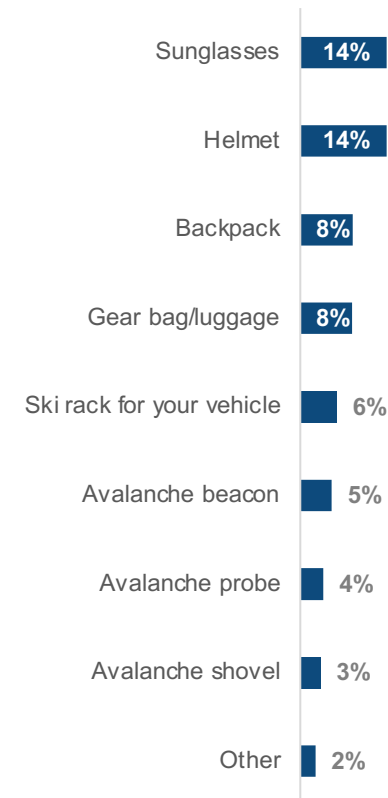
Darker shades indicate larger numbers in each row

Enthusiasts expect to make a wide variety of purchases this season

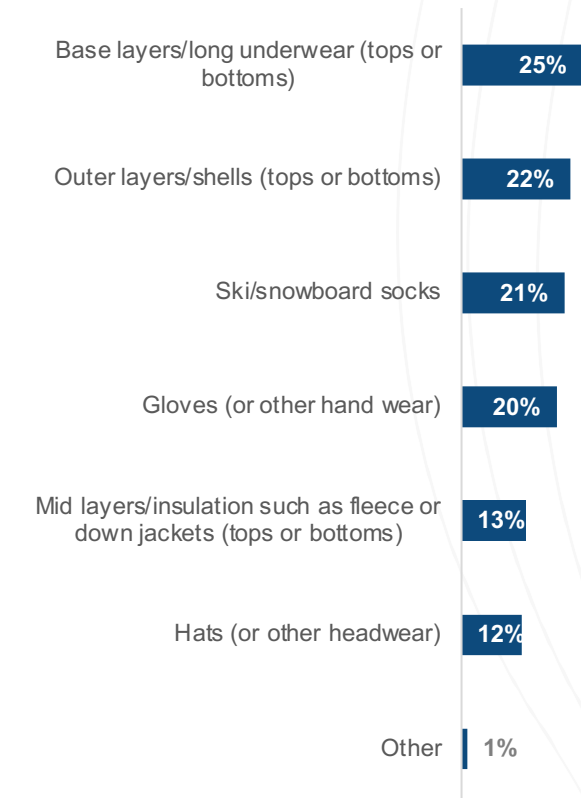
Anticipated Gear Purchases
(July only)



Anticipated Accessory Purchases
(July only)

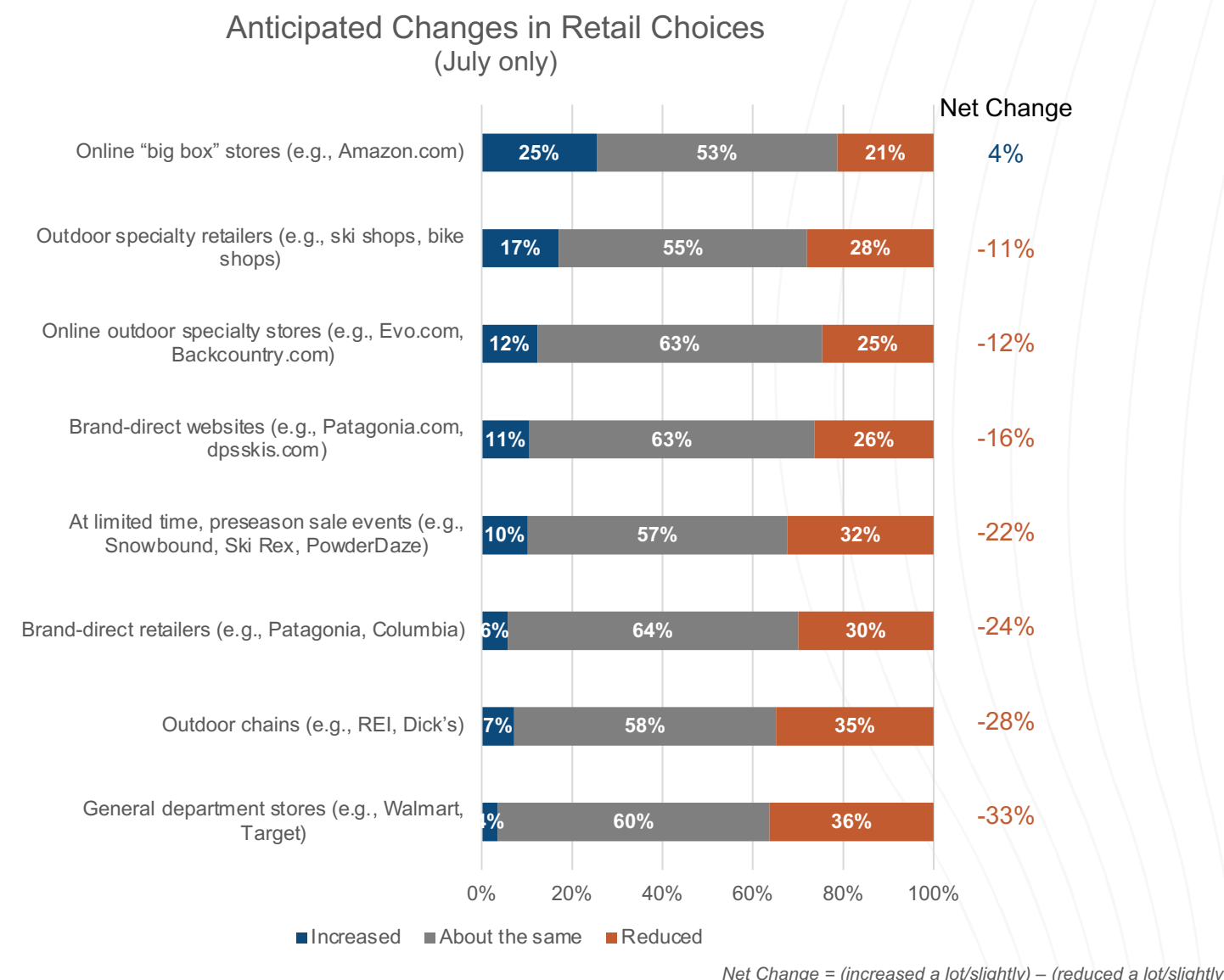


Anticipated Apparel Purchases
(July only)



Enthusiasts anticipate purchasing more from online “big box” stores like Amazon this season

- Compared to “normal,” slightly more respondents expected to increase their spending at online “big box” retailers than expected to decrease their spending at such stores.
- On the whole, respondents expected to decrease their spending at all other types of retailers.
 - However, these decreases were lowest for specialty stores (both in-person and online), as well as brand-direct websites.
- Respondents were least-excited about shopping at outdoor chains or general department stores.
 - While it is important to remember that respondents are frequent participants and likely have preferences for products that these types of stores do not carry, this does suggest a general aversion to shopping at mass-market retailers for snowsports products.



Frequent participants are more likely than others to rely on specialty retail

Net Anticipated Changes in Retail Choices
(increased - reduced, July only)

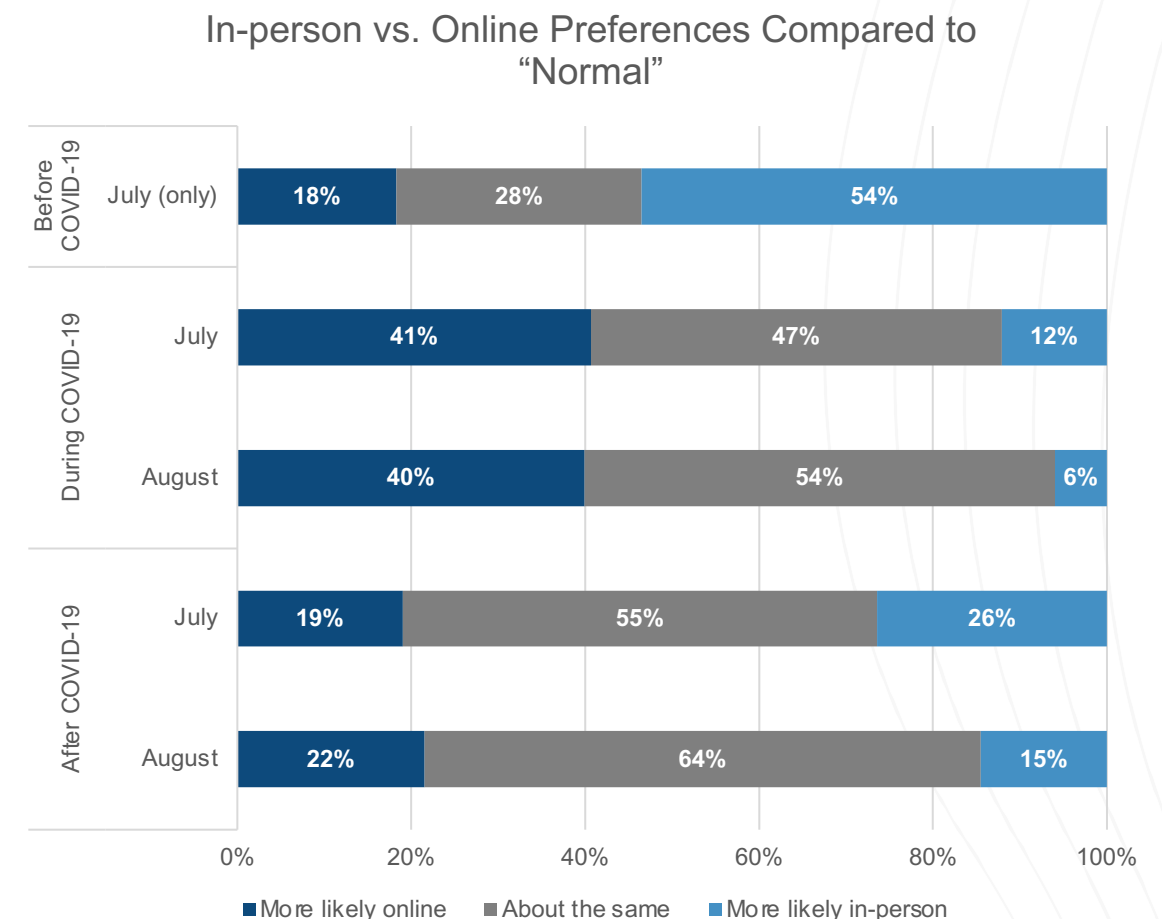
	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base (minimum)	1065	256	518	152	629	347	323	637	853	87	292	196	376	636	310	53	208	390	467
Online “big box” stores	4%	4%	7%	-5%	3%	8%	15%	-1%	5%	5%	-10%	6%	15%	5%	6%	-4%	10%	5%	1%
Outdoor specialty retailers	-11%	-12%	-8%	-12%	-9%	-11%	-11%	-9%	-8%	-21%	-17%	-7%	-7%	-6%	-17%	-20%	-18%	-12%	-8%
Online outdoor specialty stores	-12%	-2%	-12%	-26%	-12%	-11%	-8%	-13%	-11%	-20%	-22%	-8%	-5%	-10%	-12%	-26%	-13%	-10%	-14%
Brand-direct websites	-16%	-5%	-16%	-26%	-15%	-16%	-15%	-16%	-14%	-25%	-22%	-15%	-10%	-15%	-16%	-15%	-20%	-12%	-17%
At limited time, preseason sale events	-22%	-21%	-21%	-33%	-21%	-24%	-22%	-23%	-22%	-26%	-26%	-25%	-20%	-18%	-30%	-30%	-20%	-20%	-25%
Brand-direct retailers	-24%	-23%	-22%	-26%	-25%	-21%	-23%	-24%	-23%	-26%	-30%	-23%	-20%	-22%	-25%	-28%	-25%	-23%	-25%
Outdoor chains	-28%	-22%	-28%	-35%	-29%	-25%	-28%	-27%	-26%	-31%	-31%	-28%	-25%	-27%	-27%	-38%	-24%	-25%	-32%
General department stores	-33%	-32%	-33%	-34%	-34%	-29%	-32%	-33%	-32%	-32%	-36%	-36%	-29%	-32%	-31%	-42%	-31%	-30%	-35%

- While online “big box” stores like Amazon were relatively popular with all segments, they tended to be more popular with infrequent participants than frequent participants.
 - However, they were perhaps most popular among families with kids. These types of participants likely value the simplicity and ease of shopping online.
- On the other hand, outdoor specialty stores were more popular among frequent participants.
 - These types of individuals likely value the guidance from staff and quality of brands that specialty stores can provide.

Darker shades indicate larger numbers in each row

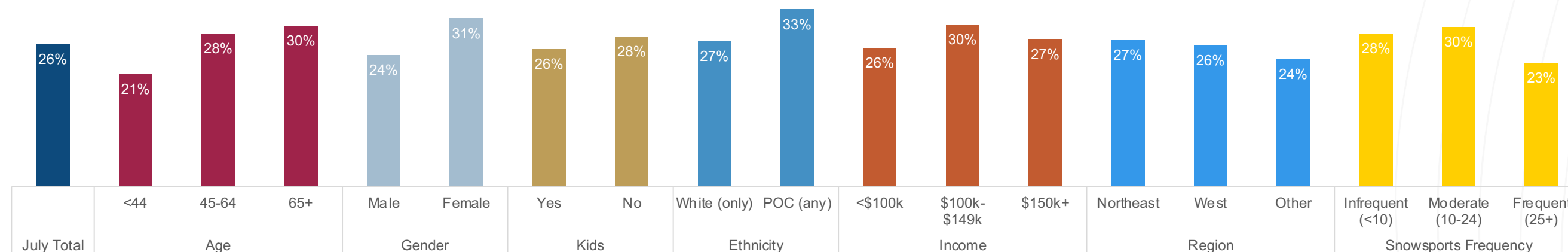
In-person shopping will likely not return to pre-COVID levels in the future, but it will rebound somewhat

- Before COVID-19, over half of respondents (54%) said that they were more likely to purchase snowsports gear and apparel in-person.
- During the COVID-19 situation, this percentage dropped dramatically (to 12% in July).
- After the situation has subsided, some respondents expected to shift their purchases back to in-person shopping (to 26% in July).
 - While this suggests that brick-and-mortar retail will rebound somewhat after the pandemic has subsided, it is unlikely that it will ever fully return to pre-COVID levels.
- It also appears that interest in in-person shopping has dropped somewhat even in recent months.
 - Considerably fewer respondents in August said that they would likely shop in-person during or after COVID-19 compared to the results seen in July.



Interest in making in-person purchases in the future is higher among older enthusiasts and women

More Likely to Purchase In-Person After COVID-19
(July only)



Respondents under age 45 were particularly unlikely to say that they would be more likely to make purchases in person after COVID-19 compared to those ages 45+.

Similarly, men were relatively unlikely to anticipate making purchase in store after COVID-19 than women.

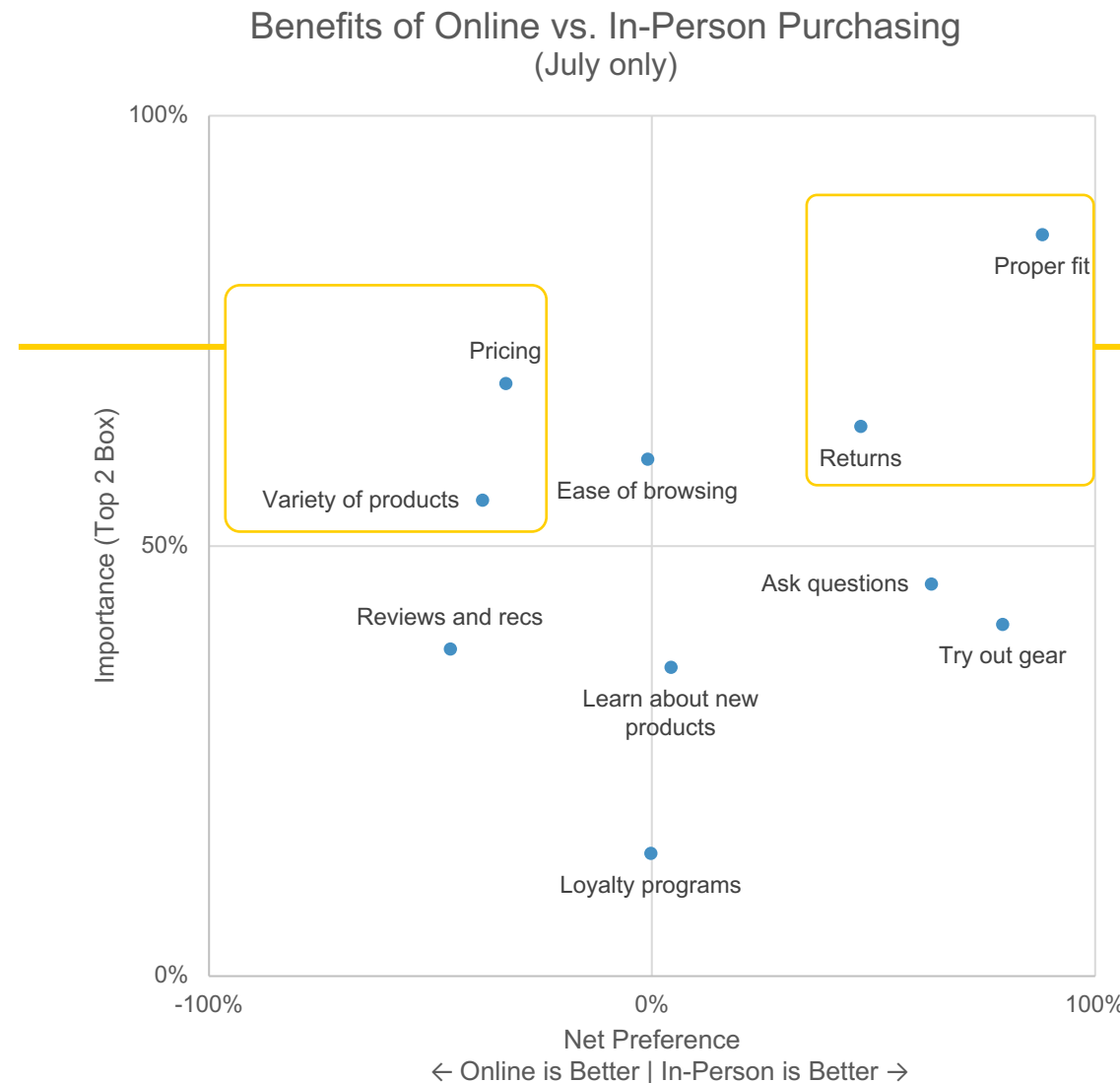
While the sample size for respondents of color was relatively small, it also appears that people of color were slightly more likely to be interested in in-store purchases in the future compared to White respondents.

Net Expected Change = (much/a little more) – (much/a little less)

Online purchasing cannot replicate the ability to ensure a proper fit like in-person purchasing

For those looking to capitalize on the shifts toward online shopping, offering a variety of products at low costs is key.

- These two areas were very important to respondents, and they are areas where online shopping is seen as being superior.



For those trying to lure shoppers back to brick-and-mortar stores, it will be critical to help customers find products that fit them well.

- Ensuring a proper fit was the most important aspect of shopping to respondents, and it is an area where online shopping simply can't compete.
- Similarly, ease of making returns was an area that was very important to respondents and where in-person shopping is seen as being superior.

Proper fit is critical to essentially all types of buyers

Importance of Retail Benefits
(extremely/very important - July only)

	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base (minimum)	1053	259	520	154	633	352	324	643	859	87	293	199	376	642	311	55	204	384	465
Ensuring that the products you buy fit you properly	86%	86%	86%	89%	85%	88%	82%	88%	86%	86%	85%	88%	84%	88%	86%	71%	87%	84%	87%
Better pricing and discounts	69%	74%	67%	60%	67%	72%	71%	67%	68%	68%	75%	69%	64%	68%	71%	64%	67%	71%	68%
Ease of returning products you don't want to keep	64%	65%	64%	66%	60%	74%	63%	65%	64%	64%	65%	69%	59%	64%	63%	66%	62%	65%	64%
Ease of browsing products	60%	59%	60%	58%	56%	68%	58%	61%	60%	64%	59%	60%	59%	60%	60%	53%	59%	63%	58%
Variety of products available	55%	51%	55%	60%	54%	58%	55%	55%	55%	60%	55%	53%	54%	56%	54%	45%	58%	54%	55%
Ability to ask questions from experts	46%	38%	47%	53%	44%	49%	45%	46%	46%	45%	43%	51%	42%	48%	43%	32%	40%	44%	49%
Ability to try out gear before you commit	41%	41%	39%	44%	39%	45%	37%	43%	40%	46%	41%	43%	38%	42%	40%	30%	41%	41%	41%
Reviews or recommendations from other customers	38%	43%	37%	33%	34%	45%	39%	37%	37%	38%	36%	41%	38%	38%	38%	38%	40%	40%	35%
Ability to learn about new products you didn't know about	36%	33%	36%	40%	36%	36%	32%	38%	36%	34%	34%	39%	35%	37%	34%	38%	27%	36%	40%
Loyalty programs	14%	14%	14%	12%	13%	16%	15%	14%	13%	20%	14%	15%	15%	16%	11%	15%	11%	11%	19%

- While there were slight differences in the importance of various aspects of retail options between segments, the most notable finding is perhaps simply that essentially all segments valued ensuring a proper fit. In-person retailers should capitalize on this advantage over online options as much as possible.

Darker shades indicate larger numbers in each row

Older enthusiasts and women are more likely to value the in-person experience

Net Preference for Online vs. In-Person Purchasing
(July only)

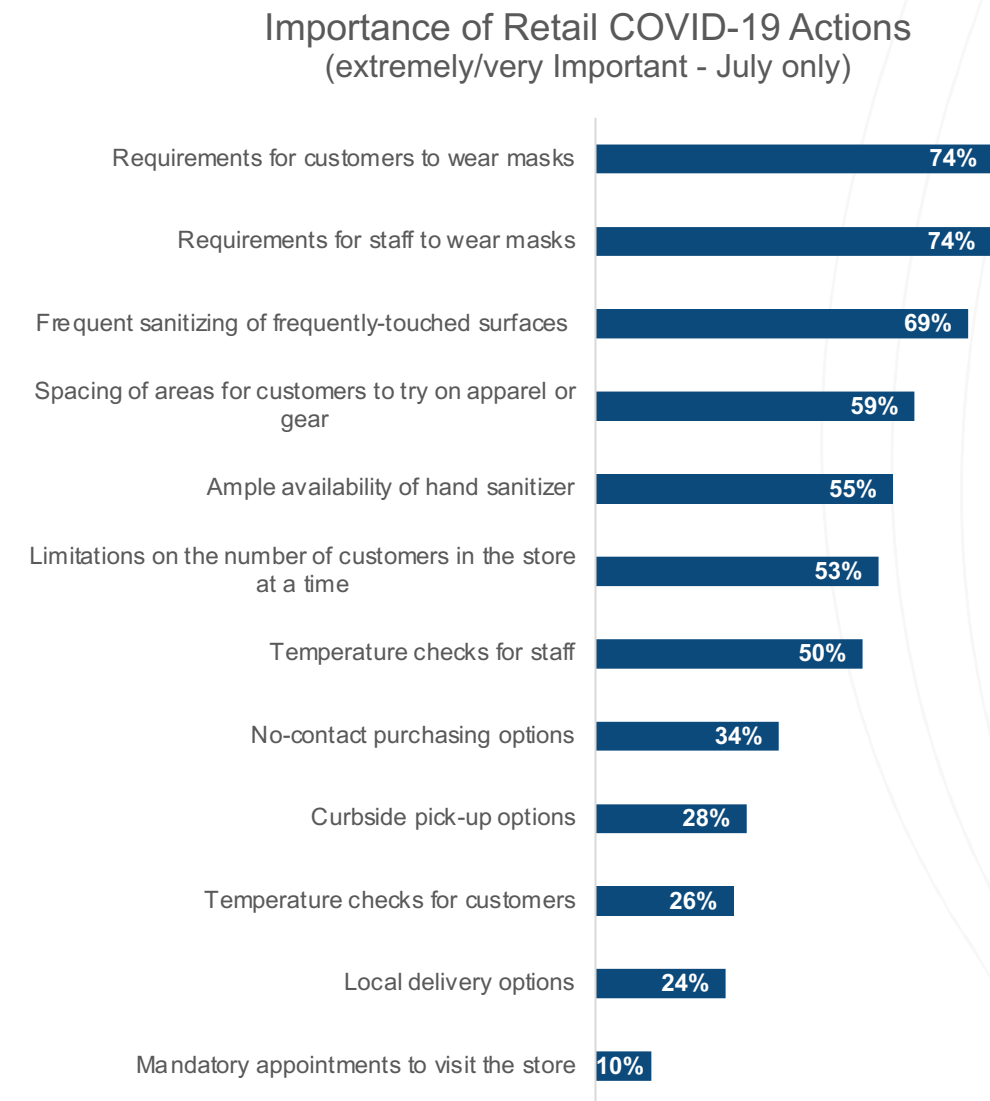
	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base (minimum)	1031	258	511	154	626	348	318	639	850	86	293	197	369	636	308	53	203	380	448
Ensuring that the products you buy fit you properly	88%	89%	89%	89%	88%	91%	85%	91%	90%	79%	93%	86%	88%	88%	90%	89%	90%	87%	88%
Ability to try out gear before you commit	79%	79%	81%	82%	79%	82%	74%	83%	81%	76%	79%	84%	78%	81%	79%	72%	76%	80%	79%
Ability to ask questions from experts	63%	61%	64%	67%	63%	66%	61%	65%	64%	59%	57%	69%	64%	67%	58%	59%	71%	62%	60%
Ease of returning products you don't want to keep	47%	49%	47%	55%	48%	48%	46%	49%	49%	44%	48%	46%	50%	49%	45%	49%	52%	49%	43%
Ability to learn about new products you didn't know about	4%	0%	5%	6%	-2%	16%	6%	3%	4%	1%	6%	4%	1%	11%	-10%	7%	0%	1%	9%
Loyalty programs	0%	-2%	-2%	5%	-2%	1%	2%	-2%	0%	-2%	-2%	2%	-3%	0%	-1%	-2%	0%	-4%	3%
Ease of browsing products	-1%	-16%	1%	8%	-6%	7%	-3%	-1%	-2%	-2%	-9%	-8%	3%	2%	-9%	6%	-2%	-2%	0%
Better pricing and discounts	-33%	-39%	-35%	-27%	-40%	-26%	-40%	-32%	-35%	-31%	-28%	-37%	-38%	-30%	-43%	-44%	-28%	-34%	-35%
Variety of products available	-38%	-48%	-37%	-30%	-43%	-31%	-39%	-38%	-38%	-35%	-34%	-35%	-43%	-38%	-41%	-38%	-32%	-43%	-38%
Reviews or recommendations from other customers	-46%	-65%	-44%	-23%	-44%	-52%	-48%	-45%	-47%	-37%	-44%	-52%	-44%	-43%	-53%	-40%	-52%	-52%	-37%

- In general, respondents age 65 and older were more likely to feel that in-person stores were better in nearly all dimensions compared to younger respondents.
- Likewise, women were more likely to value in-person stores than men.

Net Preference = (in-person is much/a little better) – (online is much/a little better)
Darker shades indicate larger numbers in each row

Masks, sanitization, and spacing are critical to making sure customers feel safe in store

- A strong majority (74%) of respondents said that it was “extremely” or “very” important that the retail stores they visit have requirements for both staff and customers to wear masks.
- In addition, frequent sanitization of frequently-touched surfaces, spacing of areas for customers, ample hand sanitizer, limitations on customer capacity, and temperature checks for staff were all at least “very” important for over half of respondents.
- Other measures, such as no-contact purchasing options, curbside pickup, temperature checks for customers, local delivery options, and appointments to visit stores were only important to smaller segments of customers.



COVID safety is more important to older enthusiasts and women

Importance of Retail COVID-19 Actions
(extremely/very Important - July only)

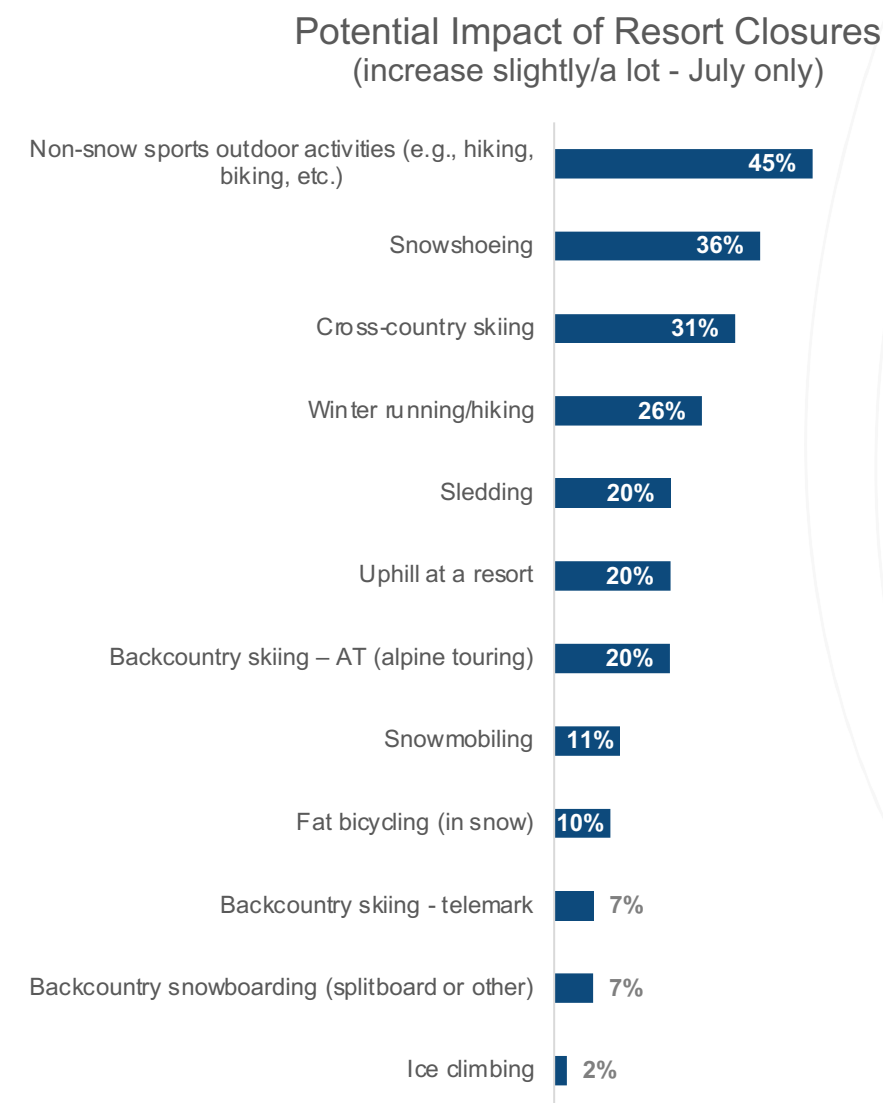
	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base (minimum)	1024	257	520	155	633	350	321	645	859	87	292	198	376	640	312	54	202	376	446
Requirements for customers to wear masks	74%	72%	73%	78%	71%	79%	70%	75%	73%	78%	70%	79%	72%	75%	74%	55%	73%	74%	75%
Requirements for staff to wear masks	74%	72%	72%	81%	71%	78%	69%	76%	74%	74%	72%	79%	71%	74%	76%	50%	74%	73%	74%
Frequent sanitizing of frequently-touched surfaces (e.g., door handles, baskets, registers, etc.)	69%	70%	68%	69%	65%	77%	70%	68%	68%	72%	69%	71%	67%	70%	72%	48%	69%	70%	68%
Spacing of areas for customers to try on apparel or gear	59%	55%	58%	69%	56%	67%	60%	59%	59%	60%	58%	63%	56%	60%	59%	49%	63%	59%	58%
Ample availability of hand sanitizer	55%	58%	54%	53%	50%	66%	57%	55%	54%	64%	55%	57%	53%	57%	54%	42%	59%	55%	54%
Limitations on the number of customers in the store at a time	53%	51%	51%	58%	48%	60%	52%	52%	52%	51%	49%	56%	50%	54%	51%	45%	54%	52%	52%
Temperature checks for staff	50%	48%	49%	57%	47%	56%	47%	51%	49%	54%	52%	52%	46%	48%	54%	42%	51%	46%	52%
No-contact purchasing options	34%	36%	33%	34%	31%	39%	34%	33%	33%	40%	33%	35%	32%	34%	36%	24%	35%	33%	35%
Curbside pick-up options	28%	37%	25%	22%	23%	36%	29%	27%	27%	32%	30%	31%	24%	26%	32%	24%	28%	30%	27%
Temperature checks for customers	26%	24%	24%	29%	23%	29%	19%	28%	24%	33%	30%	25%	21%	22%	32%	24%	27%	22%	28%
Local delivery options	24%	30%	22%	18%	21%	28%	27%	22%	23%	29%	24%	24%	23%	23%	27%	16%	28%	23%	24%
Mandatory appointments to visit the store	10%	11%	8%	13%	10%	10%	8%	11%	9%	17%	11%	9%	10%	10%	11%	9%	12%	8%	11%

- While both older respondents and women were particularly likely to value the in-person shopping experience over shopping online, these two segments also feel that it is important for retailers to take steps to reduce the COVID-19 risk. It is critical for brick-and-mortar retailers to ensure these segments (and others) feel safe in order to continue to promote the value of shopping in person.

Darker shades indicate larger numbers in each row

If resorts cannot open, many will turn to snowshoeing and cross-country skiing

- When asked how they would change their participation in non-resort activities if resorts are unable to operate at full capacity, non-snowsports activities would be a popular choice for many (45% would increase their participation in these activities).
- However, respondents said they would increase their participation in a wide variety of other activities as well. Snowshoeing was of particular interest (36% increasing their participation), as was cross-country skiing (31%).
- Other activities, such as winter hiking/running, sledding, uphill, and backcountry skiing would all likely see increased participation if ski areas are not open (20-26% increasing their participation in these activities).



Many older enthusiasts would turn to cross-country skiing while younger enthusiasts would try a variety of activities

Potential Impact of Resort Closures
(increased slightly/a lot - July only)

	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base (minimum)	970	257	497	137	604	334	306	618	820	84	281	189	360	611	299	49	192	352	426
Non-snow sports outdoor activities (e.g., hiking, biking, etc.)	45%	50%	46%	32%	44%	46%	49%	42%	45%	43%	42%	43%	49%	41%	53%	33%	39%	43%	49%
Snowshoeing	36%	32%	39%	34%	33%	41%	37%	36%	37%	26%	30%	35%	41%	37%	37%	15%	25%	35%	41%
Cross-country skiing	31%	25%	34%	38%	29%	37%	34%	31%	33%	24%	30%	29%	35%	31%	33%	22%	19%	32%	36%
Winter running/hiking	26%	31%	27%	14%	24%	30%	30%	24%	26%	21%	22%	25%	30%	24%	30%	22%	15%	25%	31%
Sledding	20%	30%	18%	12%	19%	23%	29%	15%	20%	16%	18%	21%	21%	20%	21%	10%	21%	19%	21%
Uphill at a resort	20%	23%	21%	13%	21%	18%	20%	20%	20%	20%	16%	21%	24%	17%	26%	14%	8%	12%	32%
Backcountry skiing – AT (alpine touring)	20%	24%	19%	17%	23%	15%	20%	20%	21%	16%	17%	18%	24%	17%	26%	14%	7%	15%	30%
Snowmobiling	11%	14%	12%	5%	12%	10%	16%	10%	12%	10%	11%	7%	15%	10%	13%	10%	6%	13%	13%
Fat tire bicycling (in snow)	10%	7%	12%	6%	11%	7%	12%	8%	10%	5%	7%	10%	12%	9%	12%	12%	7%	11%	10%
Backcountry skiing - telemark	7%	4%	8%	7%	6%	8%	9%	6%	7%	7%	7%	6%	7%	5%	9%	10%	4%	6%	9%
Backcountry snowboarding (splitboard or other)	7%	15%	5%	1%	7%	6%	6%	7%	7%	7%	10%	7%	6%	5%	10%	2%	1%	10%	7%
Ice climbing	2%	4%	3%	0%	3%	1%	3%	2%	3%	1%	2%	1%	4%	2%	2%	4%	3%	2%	3%

Darker shades indicate larger numbers in each row

There are many ways to participate even if resorts are unable to operate at full capacity

- The risk of COVID-19 has led many to re-think how the 2020-2021 season will look. While some expect to take simple actions like arriving at the resort earlier in the day to avoid crowds, skiing during the week, or bringing their own food, others noted they were less likely to travel long distance to participate in snowsports.
- Smaller, local resorts were also appealing to some due to the perception they will be less crowded.
- Respondents also noted they would likely not want to share a lift at a resort with anyone that is not family to reduce their exposure risk to COVID-19.
- Due to some of the concerns around large resorts and crowds, some respondents noted they would instead spend the 2020-2021 winter doing backcountry skiing or snowboarding, cross-country skiing, or snowshoeing. These activities were thought to be safer than on-resort activities.



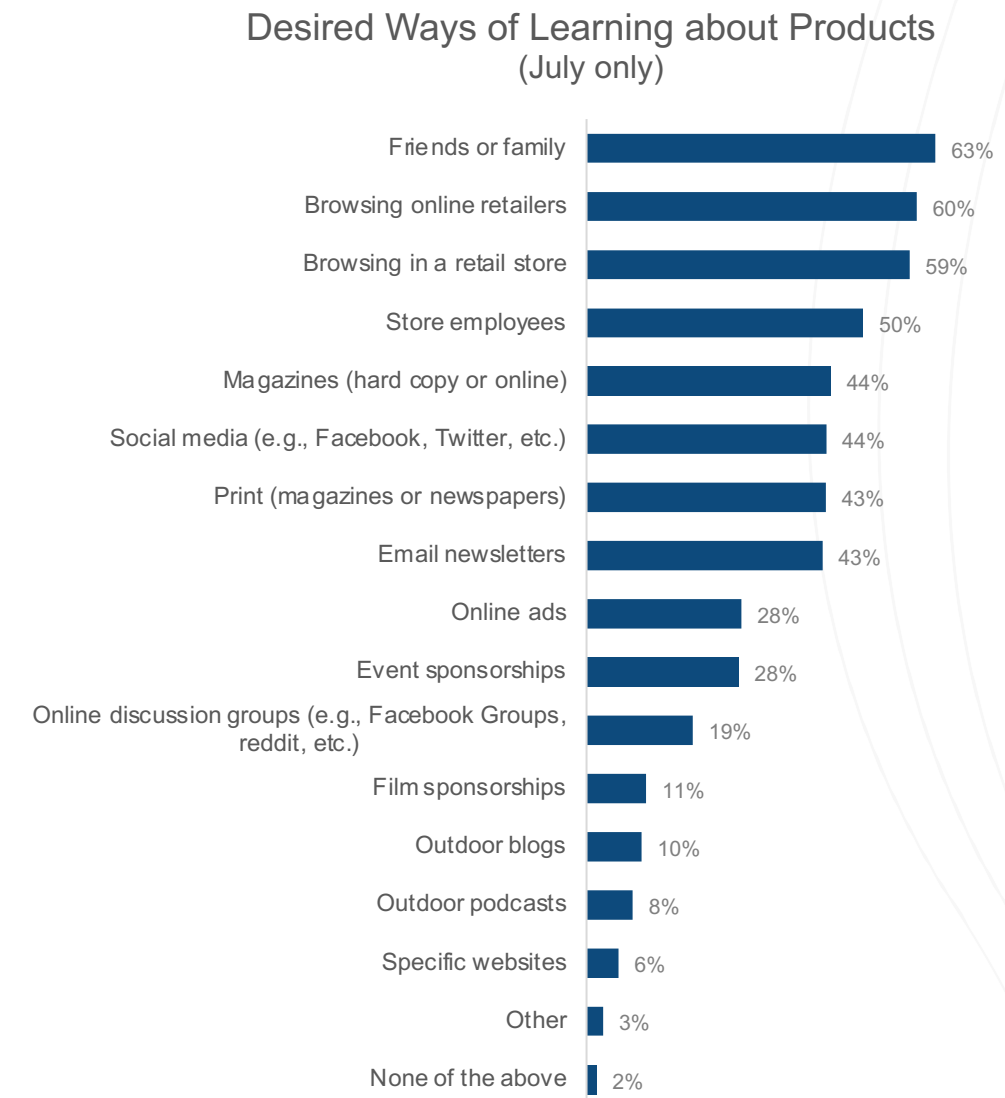
I plan to X-country ski on the trail behind my house and buy a season trail pass in Bethel ME. I already have a season pass at Black Mountain of Maine, which expects to open. I expect I will have to boot up at my car rather than in the lodge.

This question was open-ended, and the most common themes are summarized here. Verbatim responses are available separately.

COMMUNICATIONS AND MARKETING

Retailers remain a key source of information about new products

- While word-of-mouth will always be a key way that people learn about new products, services, events, and brands, retailers play an important role in helping people to learn about these types of offerings.
 - People very commonly browse both online or retail stores, and around half said that they learn about new offerings from retail store employees.
- Among the proactive media included in the survey, magazines, social media, newspapers, and newsletters were all common ways that people learn about new offerings.
- Online ads, events sponsorships, and online discussion groups were all used by smaller segments of respondents to learn about new offerings.



Young people tend to be more interested in learning about offerings in online and innovative media

Desired Ways of Learning about Products
(July only)

	July Total	Age			Gender		Kids		Ethnicity		Income			Region			Snowsports Frequency		
		<44	45-64	65+	Male	Female	Yes	No	White (only)	POC (any)	<\$100k	\$100k-\$149k	\$150k+	Northeast	West	Other	Infrequent (<10)	Moderate (10-24)	Frequent (25+)
Base	1084	279	545	175	674	378	345	688	917	96	325	208	400	677	332	65	268	374	442
Friends or family	63%	60%	67%	61%	59%	71%	66%	63%	65%	53%	58%	63%	66%	65%	61%	57%	58%	63%	67%
Browsing online retailers	60%	62%	59%	57%	62%	56%	58%	61%	61%	53%	59%	57%	63%	59%	63%	55%	55%	64%	59%
Browsing in a retail store	59%	56%	58%	65%	60%	57%	54%	61%	60%	46%	60%	55%	58%	59%	60%	49%	56%	60%	59%
Store employees	50%	42%	52%	58%	52%	48%	48%	51%	51%	43%	51%	49%	49%	52%	49%	37%	40%	50%	57%
Magazines (hard copy or online)	44%	33%	46%	58%	48%	39%	42%	46%	45%	40%	37%	50%	44%	44%	45%	49%	36%	43%	51%
Social media (e.g., Facebook, Twitter, etc.)	44%	59%	43%	28%	38%	55%	44%	45%	44%	48%	47%	44%	46%	42%	48%	42%	50%	41%	42%
Print (magazines or newspapers)	43%	25%	46%	63%	46%	39%	42%	45%	44%	39%	40%	46%	41%	43%	46%	37%	41%	41%	47%
Email newsletters	43%	35%	46%	51%	45%	41%	42%	44%	43%	43%	44%	41%	43%	43%	43%	46%	39%	43%	45%
Online ads	28%	27%	30%	29%	32%	23%	28%	29%	28%	28%	29%	34%	28%	28%	30%	26%	30%	28%	27%
Event sponsorships	28%	28%	30%	22%	28%	27%	30%	27%	27%	33%	27%	32%	27%	29%	27%	22%	28%	26%	29%
Online discussion groups (e.g., Facebook Groups, reddit, etc.)	19%	28%	19%	10%	19%	21%	23%	19%	19%	30%	20%	21%	20%	20%	20%	12%	16%	19%	22%
Film sponsorships	11%	18%	9%	5%	12%	9%	10%	11%	11%	9%	13%	10%	10%	10%	13%	5%	10%	12%	10%
Outdoor blogs	10%	15%	9%	5%	10%	11%	13%	9%	9%	17%	11%	10%	10%	9%	13%	8%	10%	11%	9%
Outdoor podcasts	8%	15%	7%	3%	9%	9%	10%	8%	9%	7%	9%	10%	9%	9%	9%	3%	6%	8%	10%
Specific websites	6%	7%	4%	7%	7%	4%	6%	5%	5%	9%	8%	3%	5%	5%	6%	8%	4%	6%	7%

- Not surprisingly, older respondents tended to be more interested in traditional media, such as magazines, newspapers, and email newsletters, than younger respondents.
- On the other hand, younger respondents were more likely to be interested in social media, online discussion groups, film sponsorships, outdoor blogs, and outdoor podcasts.

Darker shades indicate larger numbers in each row

“

I just want to say thanks to everyone who hangs in and provides skiing in spite of the constant challenges. Warmer winters, extreme cost of infrastructure, insurance, etc. I'm afraid I think snow sports might be doomed as our world changes, but for as long as I can, I'll keep skiing every year. It has been very important to me personally and is the most unifying thing for my family.

”

A final comment from a survey respondent.



POWERED BY:
snowbound

ABOUT SIA RESEARCH

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

- NPD MONTHLY RETAIL SALES REPORTS – Top line retail data issued from November to May.
- WHOLESALE SALES AND ORDERS – Aggregated wholesale market data
- ANNUAL WINTER PARTICIPATION STUDY - An in-depth look at winter sports demographics across the US
- PARTICIPATION INSIGHTS REPORT - A closer look at the opinions and habits of winter sports participants
- CONSUMER RESEARCH – YOY surveys conducted across a nationwide group of consumers:
 - Consumer Anticipation (early season)
 - Snow Sports Retail Consumer Behavior
 - Retail and Direct-to-Consumer for Snow Sports • Holiday Purchases
 - Snow Sports Used Marketplace
 - Snow Sports Consumer Rental and Service
 - Snow Sports Technology and Participation
 - Diversity in the Snow Sports Industry
- CUSTOM RESEARCH – Creation of custom queries within our research database/raw data.

For more information, please reach out to research@snowsports.org

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APPENDIX

METHODOLOGY

- Online survey
- Invitations sent to ~109k BEWI Expo attendees and ~14k from SIA's other mailing lists
- Fielding Periods
 - July 10-20, 2020
 - August 12-24, 2020
- Sample size
 - July – 1,209 responses (1,079 fully completed)
 - August – 1,145 responses (1,075 fully completed)
- Median Length*
 - July – 23 minutes
 - August – 14 minutes

** The July survey formed as a baseline, and the August survey only focused on a subset of questions that were of particular interest for examining trends.*

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, were 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
 - Marital Status
 - Kids
 - Employment
 - Ethnicity
 - Education
 - Income
 - Region
 - Snowsports Frequency
 - Prefer In-Person or Online
 - Confidence (Economy)
 - Confidence (Snowsports)
 - Excitement (Snowsports)

OUR RESEARCH PARTNER



1580 Lincoln Street, Suite 510
Denver, Colorado 80203
303.894.8246
CoronaInsights.com

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*
- Matt Herndon, *Principal*



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