

A DOWNHILL  
CONSUMER  
INTELLIGENCE  
PROJECT  
REPORT

NON-MEMBER \$495

# SOCIALTRENDS





TIM ZIMMERMAN

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EXECUTIVE SUMMARY

Understanding current social trends can help players in the snow sports market exploit opportunities, and help industry brands avoid the pitfalls of missing a trend. The snow sports participant base is young, well-educated and often on the front end of social trends like festival attendance, farm-to-table and organic food, the sharing economy and early adoption of technology like wearable fitness apps. Brands that understand their customers’ lifestyle and build around it have a distinct advantage over brands that fail to keep up. And it’s not easy keeping up these days.

Technology is moving at an unprecedented pace, bringing new communication vehicles, ideas, and trends to the marketplace on a constant basis. Think of how quickly Uber became a standard way to get around, how quickly the term “farm-to-table” hit the mainstream, or how fast social media became a central communication hub. Festivals like South by Southwest and Coachella are now star-studded, bucket list-worthy events and others are popping up everywhere. New ways to travel and enjoy spontaneous adventure like Airbnb, Gear Commons and Spinlister have attracted millions to activities that previously required months of planning and gear ownership. All of these trends are infused with opportunities for those who understand them well enough to take advantage.



## HOW CAN YOU USE THE CONSUMER INTELLIGENCE CONTAINED IN THIS REPORT ABOUT SOCIAL TRENDS?

What if you know that many of your core customers and potential customers are headed to a specific festival? How can your brand use the language of “farm-to-table” to engage consumers in a discussion about your brand? If you know that the notion that all Millennials live in the city and don’t own homes and cars is a myth, you have an advantage over those that are buying into that myth. Your customers are connected to social media on a 24/7 basis and are more frequently streaming media than watching and listening to traditional media, how does that impact your brand’s marketing and advertising strategies? If you know that your customers are interested in healthy lifestyle choices like organic food and tracking fitness levels, could you exploit that to engage them in snow sports? You can use this intelligence in a variety of ways because understanding your customer better gives your brand an advantage in engaging consumers, making the products that they are looking for, and attracting them to your brand.

Over the past six months, SIA Research examined a wide range of current social trends and chose those that had the most potential for impact on the snow sports market. Trends that affected more in the snow sports demographic, or had the potential for direct impact, such as gear sharing made the cut. The following trends are covered in this report:

- **FESTIVALS** – what, where and how snow sports youth experience the festival culture.
- **THE SHARING ECONOMY** – includes car, home, and gear sharing.
- **CONSTANT CONNECTION** – the connection habits of youth online.
- **FARM-TO-TABLE AND ORGANIC FOOD** – connecting food to lifestyle.
- **WEARABLE TECH AND OTHER SMART DEVICES** – where is the wearables market headed?

All of these social trends are connected to snow sports and this report analyzes that connection through the lens of a snow sports brand. Our objective is to keep SIA members and the snow sports industry on the leading-edge of trends. Those who aren’t informed may be stuck in a reactive stance, unable to adapt to the habits and attitudes of the current culture. This report focuses on the intelligence that will allow our members to be proactive and exploit the opportunities created by these trends.



## TREND SPOTLIGHT 1

THE FESTIVAL!  
HOW SNOW  
SPORTS CAN  
MAXIMIZE  
OPPORTUNITIES  
FESTIVALS  
BRING

Take a deep breath...this may be a shock...18-34 year olds love music festivals. A melting pot of entertainment, collaboration and relaxation, these gatherings have proven to be an ongoing summer past time for the Millennials and fans of all ages. Festivals including Coachella, South by Southwest, and Bonnaroo draw tens of thousands to hear music, share ideas, eat and drink, and spend.

Winter festivals like SnowGlobe in Tahoe and SnowBall in Vail draw thousands to the snow and offer prime marketing and engagement opportunities for snow sports brands.

### ACCORDING TO SIA'S CONSUMER PROFILE REPORT EXAMINING SNOW SPORTS PARTICIPATION...

8M+ SNOW SPORTS PARTICIPANTS ARE AGED 18-34

39% ARE WOMEN AND 61% ARE MEN

75% OF PARTICIPANTS AGE 18-34 HAVE A PROFILE ON A SOCIAL NETWORKING SITE

97% HAVE A MOBILE PHONE

72% OWN A SMARTPHONE

41% HAVE MADE A PURCHASE ON THEIR SMARTPHONE



To get a closer look at festival culture and how it relates to snow sports, SIA’s Tom Davis talked with Jack Mitrani (professional snowboarder, entrepreneur, filmmaker, musician, and more) who produces the Frendly Gathering. The festival was inaugurated in Mammoth Lakes, California in 2010 and continues in Vermont every summer.

Never ones to stray away from an opportunity, best friends and professional snowboarders Danny Davis and Jack Mitrani, just completed their 5th year of producing The Annual Frendly Gathering Music Festival in Windham, VT (June 25th - 27th). The three-day festival featured almost 30 different musical acts, camping, yoga, food, skateboarding, and some downhome “Frendship.” The group developed the project to bring friends together who share a deep love for music, snowboarding and the outdoors. Since their modest beginning, Frendly has partnered with globally recognizable brands like Burton, GoPro, Skype, Ben & Jerry’s, KIND: Healthy Snacks, Klean Kanteen, Love Your Brain and Martin & Co.

Jack Mitrani, shared his time with us to talk about the emergence of music festivals in action sports, the potential for the off-season connection with consumers, and the opportunity to build partnerships with non-endemic companies.

**TOM:** It seems like music and snow sports mesh pretty well together — i.e. Icelantic’s “Winter on the Rocks,” Bern’s collaboration with Wu-Tang, Burton’s collaboration with Martin Guitars, Volcom’s music label, SkiLogik and K2’s collaborations with The Grateful Dead, etc.) Why do you think that is?

**JACK:** If you think about it, music and action sports are parallel from a consumer standpoint. They’re both based on culture, lifestyle and entertainment. Contests like the X Games entertain and inspire people to participate and experience athletes performing in a dynamic setting, music festivals tap into that same part of the brain and offer a similar feel.

**TOM:** I’m seeing some potential for brands to connect with people during the off-season, right?

**JACK:** Absolutely. It gives brands a completely different platform to connect with people who are either already participating/buying product or who haven’t considered the brand. From a social media standpoint — leading up-to and during the festival — it builds interaction which is important during a time when, for some people, snow isn’t on their mind.

**TOM:** What’s next for Frendly? You guys have a lot of steam now - Is this going to be strictly a summer thing?

**JACK:** No way. We’ve got plans for another one maybe in Colorado and not just during the summer. It’s really important that we stay true to the overall atmosphere, number of attendees and core values for the event. Windham is a pretty self-sustaining spot now and we’ve got a really good team of people. With our new Airstream activation, the possibilities are pretty endless. The new activation gives us a way to connect with people year-round.



THE FRENDLY GATHERING FESTIVAL

## FESTIVALS AND SNOW MAKING THE CONNECTION

Tom’s conversation with Jack brings home the opportunities that the festival culture could bring to the snow sports market both on and off season. Festivals in the summer bring together snow sports consumers and offers opportunities to brands who traditionally, might take a break from marketing because it isn’t snowing. Opportunities that include engaging skiers and snowboarders on their social networks, building strategic partnerships, experiential marketing, off-season engagement with consumers, and product placements.

TAKE A DEEP BREATH....

18-34  
YEAR OLDS  
LOVE MUSIC  
FESTIVALS —

A MELTING POT OF ENTERTAINMENT,  
COLLABORATION AND RELAXATION

32 MILLION PEOPLE  
ATTEND MUSIC FESTIVALS IN THE U.S. EACH YEAR

FESTIVALS  
ENGAGE SKIERS AND SNOWBOARDERS  
ON THEIR SOCIAL NETWORKS,  
BUILD STRATEGIC PARTNERSHIPS,  
EXPERIENTIAL MARKETING,  
OFF-SEASON ENGAGEMENT  
WITH CONSUMERS,  
AND PRODUCT PLACEMENTS







## TREND SPOTLIGHT 2

### COLLABORATIVE CONSUMPTION, THE SHARING ECONOMY AND MILLENNIALS

Over the past decade, trends in ownership and consumption have shifted and consumers of all ages and socio-economic backgrounds may be looking to own less and share more. Millennials, born between 1985 and 2001 are driving this shift but consumers of all ages are adopting the trend. This sharing trend began to hit mainstream America, particularly the Millennials, after the economic downturn that began in 2008. During that time the Millennials struggled to find jobs in their chosen career field, accrued mountains of student loan debt, watched as their parents lost their homes, had difficulty obtaining credit, and generally came of age in very lean economic times. As a result, Millennials are driving the change toward owning less and working with others to share goods like cars, bikes, and even homes. Services that cater to this trend include Airbnb, Uber, HomeAway, Zipcar, Bikeshare, GearCommons, Gearloope, and many more are gaining traction in the new Sharing Economy. Gear sharing, home sharing, and car sharing have the potential to profoundly impact snow sports in the not-too-distant future. Preparing for that future and looking for ways to exploit this trend could provide significant benefits to the snow sports market.

### MILLENNIALS

ARE DRIVING THE CHANGE TOWARD OWNING LESS  
AND WORKING WITH OTHERS TO

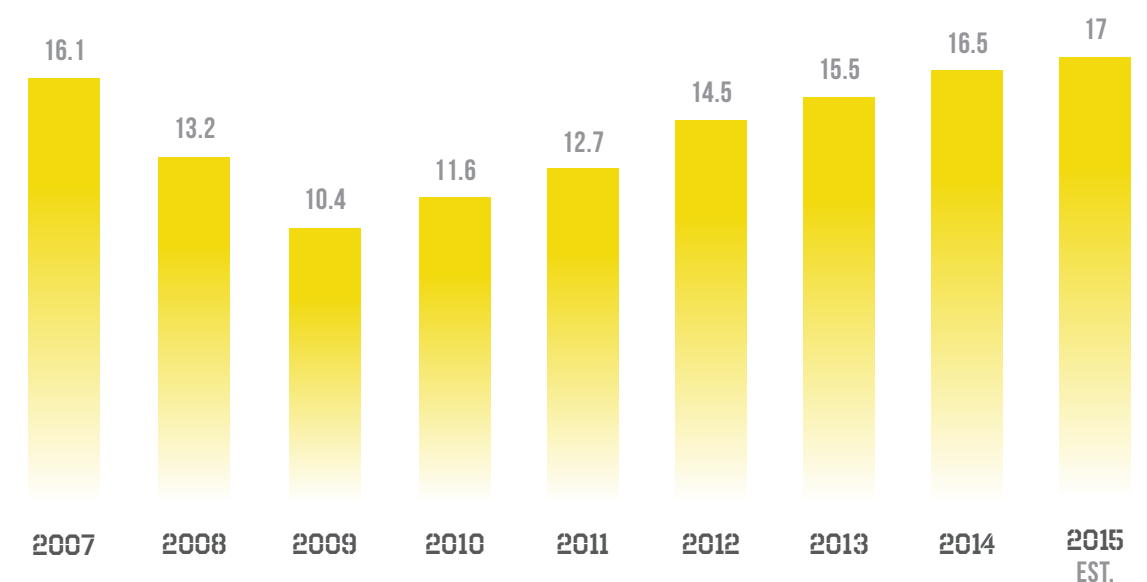
SHARE GOODS  
LIKE CARS,  
BIKES,  
AND EVEN HOMES.

ACCORDING TO AUTORENTAL NEWS,  
**IN 2014 THERE WERE**  
**19,115 CARSHARING CARS**  
IN THE U.S. AND ALMOST  
**1 MILLION CARSHARE MEMBERS.**

The automobile industry is an interesting test lab to see how the sharing economy may impact sales. According to AutoRental News, in 2014 there were 19,115 carsharing cars in the U.S. and almost 1 million carshare members. The total annual revenue for all carsharing in the U.S. reached about \$400M last year. (*AutoRental News, March/April 2015, Chris Brown*). Mobility sharing services such as RelayRides, Car2Go, and Zipcar have centralized their vision around on-demand sharing and its benefits, principally cost efficiencies for persons who do not have enough need for a car to justify the costs of purchasing and maintaining a vehicle, not to mention maintenance, storage and insurance costs.

At the same time, statistics on the number of light-vehicles (passenger) sold indicates that sales of passenger vehicles in the U.S. is at an all-time high. In fact, the 2014 auto sales reached \$408B, an all-time record of consumer spending on cars in the U.S. 27% of car buyers were Millennials in 2014, up 9% from 2010 according to J.D. Power and Associates. So, despite dire warnings that Millennials' lack enthusiasm for buying an owning vehicles and the rise of carsharing companies, the auto industry is not only healthy, but enjoying record revenue from car sales.

### NEW LIGHT-VEHICLES SOLD IN THE U.S. (MILLIONS)



Source: Power Information Network from JD Power and LMC Automotive 2015

In cities that have gone through significant gentrification and consequently have attracted a large share of Millennials over the past 10 to 20 years including Denver, Washington, D.C. and Portland, Oregon, new, expanded and/or improved public transportation systems, bike-sharing programs, and more pedestrian-friendly walkways are commonplace. Improvements in all modes of public transit have encouraged more urban residents, especially young residents to commute by bike, light-rail, and bus while driving to work at a significantly lower rate than they did a decade ago. (*Census, American Community Survey 2009-2013*). Washington D.C.'s Capital Bikeshare surveyed more than 11,100 members and found that 69 percent of respondents stated getting where they need to go fast was "very important" in encouraging them to use the program. (*NY Post, May 2015*). And some Millennials opting for the urban lifestyle may need to dedicate more income to rent and choose to cut costs by opting out of vehicle ownership.

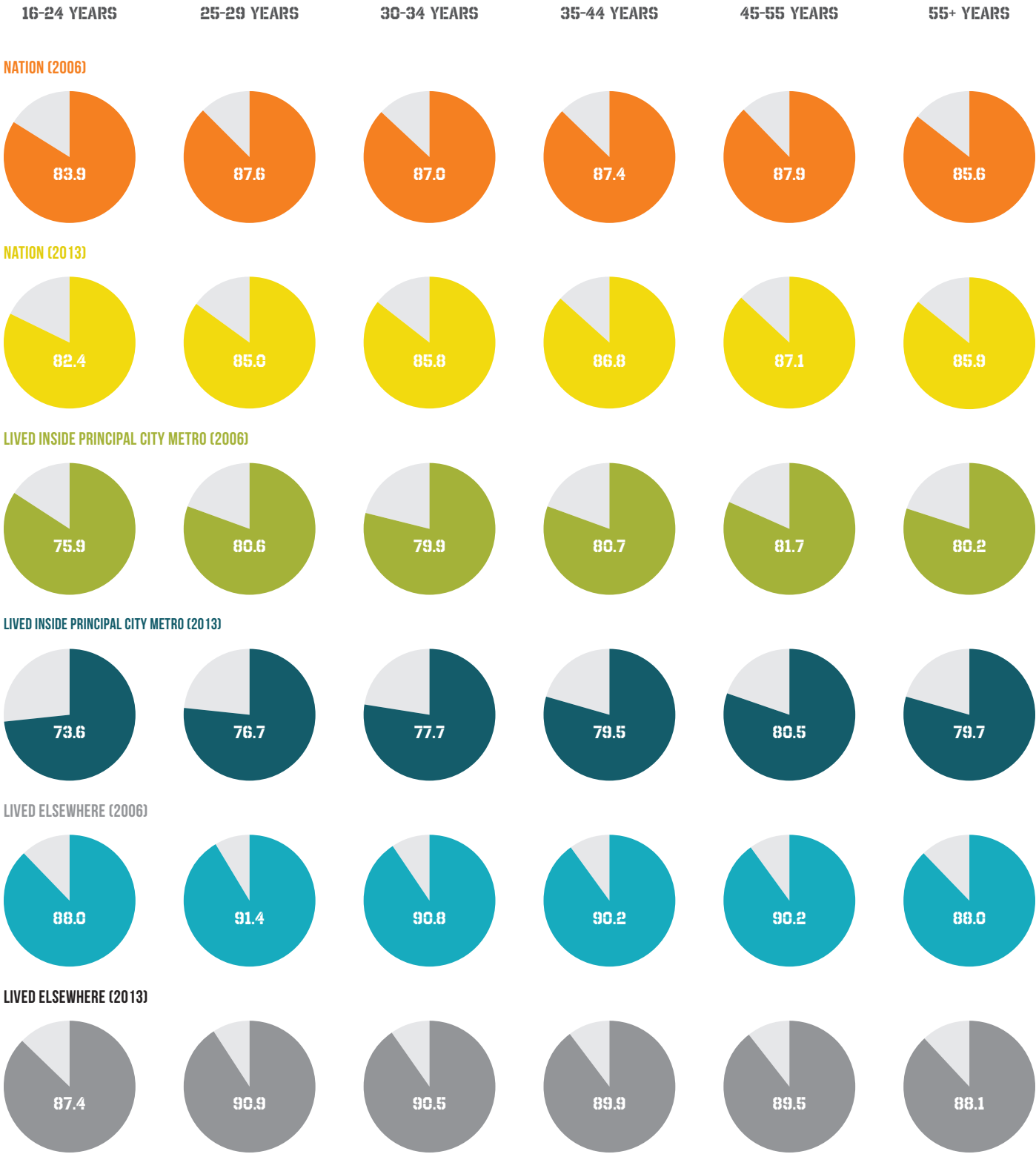
DESPITE DIRE WARNINGS  
THAT MILLENNIALS' LACK ENTHUSIASM  
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COMMUTING BY AUTOMOBILE

BY AGE AND COMMUNITY TYPE:  
2006 AND 2013

(Percent of workers. Universe: 16 years and older. Data based on sample. For information on confidentiality protection, sampling error, nonsampling error, and definitions, see [www.census.gov/acs/www/](http://www.census.gov/acs/www/))

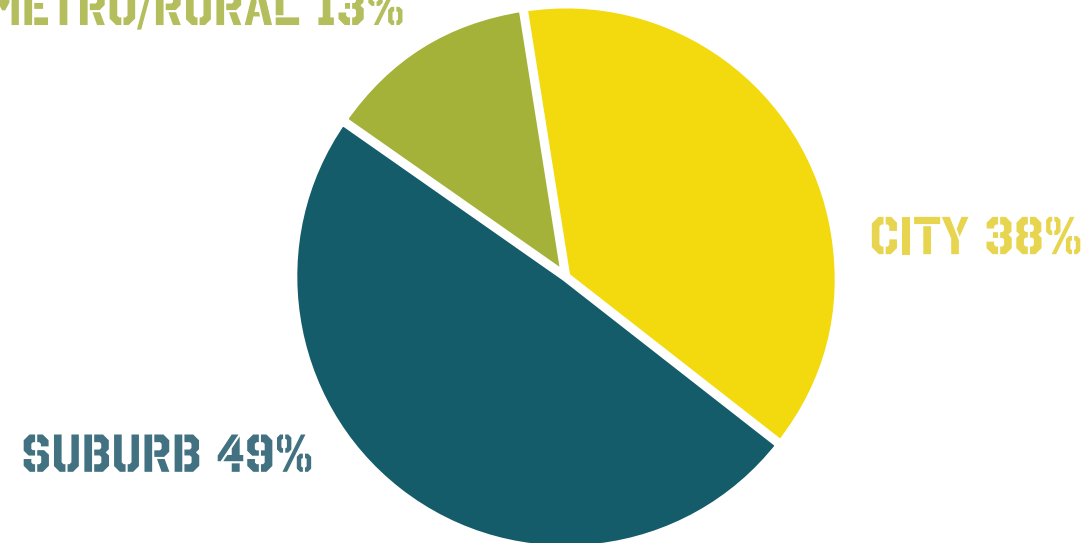


Note: See Appendix Table 2 for estimates and margins of error. Source: U.S. Census Bureau, 2006 and 2013 American Community Survey.



## POPULATION OF MILLENNIALS 2014

NON-METRO/RURAL 13%



The housing market is another industry warned about the impacts of Millennials who reportedly are reluctant to purchase homes. Home ownership rates fell from a 20-year peak in 2004 of 69.2% to a low of 63.5% in 2015, the lowest rate in 20 years. And home ownership among young adults has dropped to 36.8% from the 2004 peak of 43.1%. (Housing Vacancies and Homeownership, U.S. Census Bureau). The main reason for this decline was the catastrophic collapse of the housing market in 2008 when the financial markets that contained \$billions of investments in high risk homeowner loans collapsed. A strong argument could be made that the rate of home ownership was vastly and artificially inflated by the sheer volume of high risk mortgage loans made between 1995 and 2007. Since the collapse, the credit market tightened and mortgage loans are much harder to obtain, particularly for young persons who tend to have less income, shorter credit histories, and significant student loan debt. According to TransUnion data, the percentage of consumers in their 20s with student debt has jumped from 32% in 2005 to 52% in 2014. The share of student loans in relation to other debt held by young consumers has skyrocketed, too, increasing from 12.9% to 36.8% over the past decade. At the same time, their share of mortgage debt dropped from 63.2% to 42.9%. (*TransUnion Millennial Study*).

Although Millennials are said to be “flocking” to urban areas, Census data indicates that a higher percentage of Millennials live in the suburbs than in the City. In fact, almost half of the 80 million Millennials in the U.S. live in the suburbs.

Additionally, a larger share of 18 to 34 year olds live at home with their parents. In 2007, 22% of 18 to 34 year olds lived with their parents, in 2015, 26% lived at home with their parents. Recent surveys conducted by The Demand Institute, a non-profit operated jointly by Nielsen and the Conference Board clearly indicated that Millennials want to own a home. In fact, only 16% of respondents ages 18 to 29 said that won’t own a home while 26% already owned a home and 60% said they eventually will own a home. And when Millennials buy homes, they buy in the suburbs. According to the 2015 American Community Survey conducted by the U.S. Census Bureau, more Millennials are moving from the cities to the suburbs than from the suburbs to the city (721,000 out, 554,000 in). In fact, according to a recent study from the National Association of Home Builders, 66% of people born after 1977 want to live in the suburbs.

ALTHOUGH MILLENNIALS ARE SAID TO BE “FLOCKING” TO URBAN AREAS, CENSUS DATA INDICATES THAT A HIGHER PERCENTAGE OF MILLENNIALS LIVE IN THE SUBURBS THAN IN THE CITY

IN FACT  
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HOME OWNERSHIP RATES FELL FROM A 20 YEAR PEAK  
IN 2004 OF 69.2%  
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SHARING AND SNOW  
MAKING THE CONNECTION

People looking to share their homes for cash, or make some extra money providing others with transportation services are having wide ranging impacts on snow sports-related travel. The American international transportation company – Uber Technologies has recently been valued at nearly \$50B. Starting this season, Uber is offering UberSki in the greater Salt Lake City area, a service that will take skiers and snowboarders to any resort on the Wasatch front including Powder Mountain, Snowbird, Alta, Park City, Deer Valley, Solitude and Brighton resorts. Similarly Airbnb, the online marketplace connecting people looking to rent their homes with people who are looking for accommodations has a myriad of offerings in resort towns including Park City, Vail, Steamboat, Mammoth Lakes, and in almost any place with permanent dwelling and some without. In one case, an Airbnb renter in Colorado was offering up his van for \$75 per day. Or, one can rent a cable car in the French Alps above Combe de Saulire at Courchevel resort.

When it comes to gear, the sharing economy is likely to have the most significant impacts on the snow sports rental market. First time participants or seasoned skiers/riders have the option to rent equipment or apparel from a gear sharing/rental website and have their goods shipped directly to their home or travel destination. This is more likely to impact the current rental market, there is little evidence that this would have a negative impact on sales of equipment, apparel and accessories. Services such as GearCommons & Spinlister allow people to rent their bikes, surf boards, camping gear and winter sports gear to other users. These services allow an individual to rent everything he/she needs for a ski trip either by picking an entire apparel setup and accessories package and working with a styling crew to get the right fit, or by picking out the individual pieces he/she likes most. Then, the entire package is shipped directly to their ski/snowboard destination. At the end of the trip, the participant simply throws the gear in the prepaid mailer bag included in the original box and leaves it at the front desk of their hotel to be picked up by the postal service, or they drop the package off at a post office or shipping center. The cost is about \$30 a day for a complete package, including free shipping both ways. Clothing and equipment is also available for kids and teenagers, which may appeal to parents whose kids keep outgrowing their gear on a yearly basis.

STARTING THIS SEASON,  
**UBER**  
IS OFFERING  
**UBERSKI**  
IN THE GREATER SALT LAKE CITY AREA,  
A SERVICE THAT WILL TAKE SKIERS AND SNOWBOARDERS  
TO ANY RESORT ON THE WASATCH FRONT.

SERVICES SUCH AS  
**GEARCOMMONS  
& SPINLISTER**  
ALLOW PEOPLE TO RENT THEIR  
**BIKES, SURF BOARDS, CAMPING GEAR  
AND WINTER SPORTS GEAR**  
TO OTHER USERS.

Some other benefits of gear sharing/rental sites include the opportunity for the participant to try different styles of apparel without having to commit to any new purchases prior to their trip. This option lets participants explore various gear options – giving them hands on experience and a better idea of what they would like to invest in for their future winter endeavors. New participants and returning participants have the opportunity to try better gear before they buy. Ultimately, this could lead to stronger sales in the snow sports market.

Outdoor specific gear sharing sites – that include snow sports gear, potentially could incorporate an “experience” aspect to their service by adding; a local mountain tour guide, instructor, photographer, or simply a buddy to ride with for the day, all with the option to meet with them at any given resort, or even for a backcountry experience. A focus on selling the experience of snow sports as an attractive option for Millennials may lead to more sales and increased participation overall by increasing access. This may be a key opportunity that winter resorts, retailers and brands to draw from while increasing their profitability and expanding their service options based on today’s consumer.



**GEAR  
SHARING**  
ALLOWS NEW AND RETURNING PARTICIPANTS  
THE OPPORTUNITY TO TRY  
BETTER GEAR BEFORE THEY BUY  
ULTIMATELY LEADING TO  
**STRONGER SALES**  
IN THE SNOW  
SPORTS MARKET.







# TREND SPOTLIGHT 3

## OVERSHARING AND CONNECTIVITY

We have become a society that’s hyper-connected, constantly online, and always available through smart devices including phone, tablets, laptops, and even our cars. In today’s hyper-speed business environment where “micro-moments” with customers have become part of the marketing norm, businesses need a strong and constant online presence to engage customers. People of all ages are staying connected constantly through smart devices that allow them to text, talk, and surf their favorite social media fronts – facilitating their ability to keep up with their friends, research, shop share photos and videos, talk about their most daring experiences or simply say what they had for breakfast, play games, and explore the world. With the vast majority of customers online, social media is now an integral part of any outdoor brand’s marketing strategy including snow sports – getting their messaging across with a direct reach to their consumers, participants or new potential participants. Their posts vary from updates on sales, weather, resorts closing/opening or perhaps the release of a new model of snowboard. Businesses that use social media effectively find ways to engage their customers, build their brand image, and sell products and services.

### PEW RESEARCH REPORTED THE FOLLOWING ON U.S. SMARTPHONE USE IN 2015:

67% OF CELL OWNERS FIND THEMSELVES CHECKING THEIR PHONE FOR MESSAGES, ALERTS, OR CALLS – EVEN WHEN THEY DON’T NOTICE THEIR PHONE RINGING OR VIBRATING.

44% OF CELL OWNERS HAVE SLEPT WITH THEIR PHONE NEXT TO THEIR BED BECAUSE THEY WANTED TO MAKE SURE THEY DIDN’T MISS ANY CALLS, TEXT MESSAGES, OR OTHER UPDATES DURING THE NIGHT.

29% OF CELL OWNERS DESCRIBE THEIR CELL PHONE AS “SOMETHING THEY CAN’T IMAGINE LIVING WITHOUT.”

TEXTING IS THE MOST POPULAR FEATURE OF TODAY’S SMARTPHONE, 97% OF SMARTPHONE OWNERS USE THE TEXT FEATURE.

## TEXT MESSAGING, VOICE/VIDEO CALLS, INTERNET, EMAIL RANK AMONGST MOST POPULAR SMARTPHONE FEATURES

% of smartphone owners who used the following features on their phone at least once over the course of 14 surveys spanning a one-week period		Average number of surveys (max 14) in which they reported using these features
Text messaging	97%	7.0 surveys
Voice/video calls	92%	4.1
Internet	89%	4.4
Email	88%	5.3
Social Networking	75%	4.2
Take pictures/video	60%	1.4
News	55%	1.7
Watching video	50%	1.3
Games	47%	1.9
Maps	41%	0.8
Music or podcasts	41%	1.3

Pew Research Center American Trends Panel experience sampling survey. November 10-16 2014.

Respondents were contacted twice a day over the course of one week (14 total surveys) and asked how they had used their phone in the preceding hour (besides completing the survey). Only those respondents who completed 10 or more surveys over the course of the study period are included in this analysis.

In fact, texting is one of the most popular vehicles for communication. According to a survey performed by One Reach Research, customers want the ability to text a company back immediately with a response or to initiate a text conversation themselves. When questioned, customers indicated they were interested in doing a number of different activities through text – from simple tasks such as refilling orders to more complex tasks like asking questions for tech support. (*The High Demand for Customer Service via Text Message: 2014 U.S. Survey Report*) This research indicates that businesses could increase their customers’ overall satisfaction by integrating texting into their communication strategy.

For most, unplugging while on vacation does not bring relief from a busy world, it simply brings anxiety. In fact, this condition is called nomophobia and research indicates that more than 70% of smartphone users experience the symptoms of addiction to their phones. Many people feel they need to stay connected constantly and even compulsively check emails, social media, and text when on vacation. The Trends in Mobility Report by Braun Research also points out that nearly four in 10 (38%) consumers say they never disconnect from their mobile phones. Only 7% of Americans say they unplug completely while on vacation. (*The Trends in Mobility Report, Braun Research*)





**OVERSHARING, CONNECTIVITY AND SNOW**  
**MAKING THE CONNECTION**

Skiing and snowboarding offer excellent material for social media posts and suppliers, resorts, and retailers have opportunities to turn that to their advantage. Participants often use social media to share their snow sports experiences including where they stayed, their favorite run, the food they ate, the friends and family members they snowboarded with that day, the fresh pow stash they found in the trees, videos of their best line of the day, or simply a post about their experiences.

Snow sports has an advantage on social media because it serves the “adventurous experience” market. In that market, an experience doesn’t necessarily need to be extreme to be considered an adventure, it’s the act of the experience that’s the selling factor, especially for someone that’s trying the sport for the first time. One of the main reasons consumers decide to share about a brand is to give people a better sense of who they are and what they care about. Snow sports brands have an opportunity to connect customers to the adventure of snow sports and engage them as they share their experiences.

WE HAVE BECOME A SOCIETY THAT’S HYPER CONNECTED, CONSTANTLY ONLINE,  
AND ALWAYS AVAILABLE THROUGH OUR SMART DEVICES.

WITH THE VAST MAJORITY OF CUSTOMERS ONLINE,  
**SOCIAL MEDIA**  
IS NOW AN INTEGRAL PART  
OF ANY OUTDOOR BRAND’S MARKETING  
STRATEGY INCLUDING SNOW SPORTS —

GETTING THEIR MESSAGING ACROSS WITH A DIRECT REACH  
TO THEIR CONSUMERS, PARTICIPANTS OR NEW POTENTIAL PARTICIPANTS.

**67%** OF CELL OWNERS  
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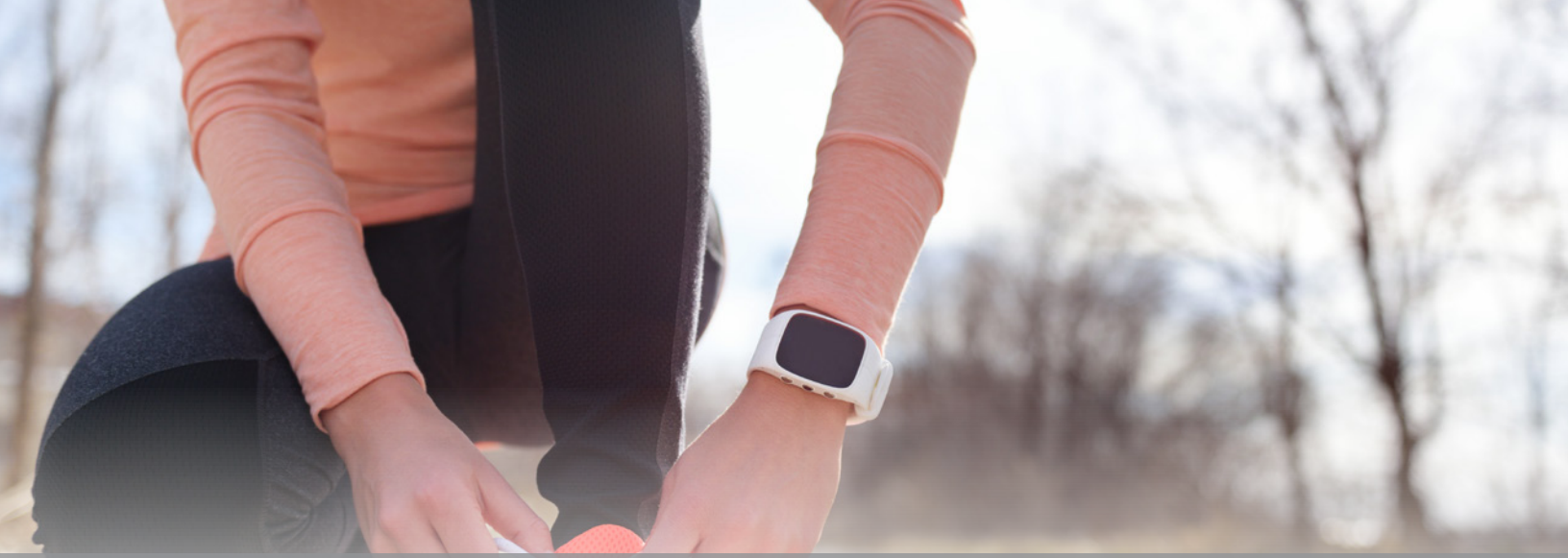
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CUSTOMERS WANT THE ABILITY TO TEXT A COMPANY BACK IMMEDIATELY WITH A RESPONSE  
OR TO INITIATE A TEXT CONVERSATION THEMSELVES.

SNOW SPORTS OFFER EXCELLENT MATERIAL FOR SOCIAL MEDIA POSTS  
AND SUPPLIERS, RESORTS,  
AND RETAILERS HAVE OPPORTUNITIES  
TO TURN THAT TO THEIR ADVANTAGE  
IN THE SNOW SPORTS MARKET.

ONE OF THE MAIN REASONS CONSUMERS DECIDE TO SHARE ABOUT A BRAND  
IS TO GIVE PEOPLE A BETTER SENSE OF WHO THEY ARE AND WHAT THEY CARE ABOUT.





# TREND SPOTLIGHT 4

## WEARABLE TECH AND SMART DEVICES

Wearable technology is a fast-paced, growing market. Products that track fitness and health help promote a healthier lifestyle. Fitness tracking devices are designed to increase our knowledge and broaden our ability to track and analyze our physical activities and fitness. Today, self-tracking is not just about collecting data for personal use, but for sharing and swapping updates with friends and loved ones. Transparency Market Research estimated that the global wearable technology market stood at \$750 million in 2012 and expected it to reach \$5.8 billion by 2018. (*Wearable Technology Market – Transparency Market Research 2012 – 2018*). The future holds exciting innovations in the wearable technology sector – including conductive fabrics or sensor smart biometric garments that measure body vitals like AiQ Smart Clothing, Hexoskin and OMsignal. However, help with monitoring goes further than just wearables. Smart devices are expected to advance into other areas such as cups and plates that measure calorie intake and sodium content of foods, while identifying known allergens; pillows and sheets that are able to monitor sleeping patterns and REM sleep cycles.

Intelligent headphones, or “hearables” are another innovation coming to the smart technology market. (*IQ, 2014*) In fact, analysts predict that the hearables market could be a \$5B industry by 2018. The appeal of hearable devices include their size, and the ear being a better place to access vitals in comparison to the wrist. Not only can one get more accurate heart rate readings from the ear, but core body temperature levels too. Combining highly accurate fitness metrics with other high quality sound and more functionality as apps become speech enabled may make the market for wearables explode.

## WEARABLE TECH, SMART DEVICES AND SNOW MAKING THE CONNECTION

In the snow sports market, the wearables sector already includes products like smart goggles, snow sports fitness apps for smart phones and watches, and smart apparel. For example BearTek Gloves are equipped with two removable interchangeable sync modules (Camera & Bluetooth wireless sync) that can be paired with any phone, music, or GoPro camera and controlled by touch sensitive buttons in the digits. The gloves have an 80-hour battery life and provide optimized grip for handling equipment with excellent moisture resistance to ensure comfort on the slopes.

As in other sports, the more unobtrusive the data collective product is, the more likely skiers/riders will wear it during competition, practice runs, and recovery. (*CNET, 2015*). Athos smart clothing tracks muscle activity, letting wearers know if they favor one side over another and, in the process, helping self-correct their form. (*NPR, April 2015*) For skiers, a set of smart under layers could give them the ability to monitor whether the intended muscles are engaged while skiing, which could lead to improved performance and faster results. These gadgets could help both skiers and riders understand and maximize the fitness benefits of skiing and snowboarding, help them capture their experiences on snow, and increase skill levels by providing detailed feedback on physical performance.

TODAY,  
SELF-TRACKING  
IS NOT JUST ABOUT  
COLLECTING DATA FOR PERSONAL USE,  
BUT FOR  
**SHARING & SWAPPING  
UPDATES**  
WITH FRIENDS AND LOVED ONES.

TRANSPARENCY MARKET RESEARCH  
ESTIMATED THAT THE GLOBAL  
WEARABLE TECHNOLOGY  
MARKET STOOD AT  
**\$750 MILLION**  
IN 2012 AND EXPECTED IT TO REACH  
**\$5.8 BILLION BY 2018.**

IN THE SNOW SPORTS MARKET,  
THE WEARABLES SECTOR ALREADY INCLUDES PRODUCTS LIKE  
**SMART GOGGLES,  
SKI SPECIFIC  
FITNESS APPS**  
FOR SMARTPHONES AND WATCHES,  
& SMART APPAREL.

**SMART  
CLOTHING  
TRACKS MUSCLE  
ACTIVITY**

AND FOR SKIERS A SET OF SMART UNDER LAYERS COULD GIVE THEM  
THE ABILITY TO MONITOR WHICH MUSCLES ARE ENGAGED  
WHICH COULD LEAD TO IMPROVED PERFORMANCE  
AND FASTER RESULTS.





# TREND SPOTLIGHT 5

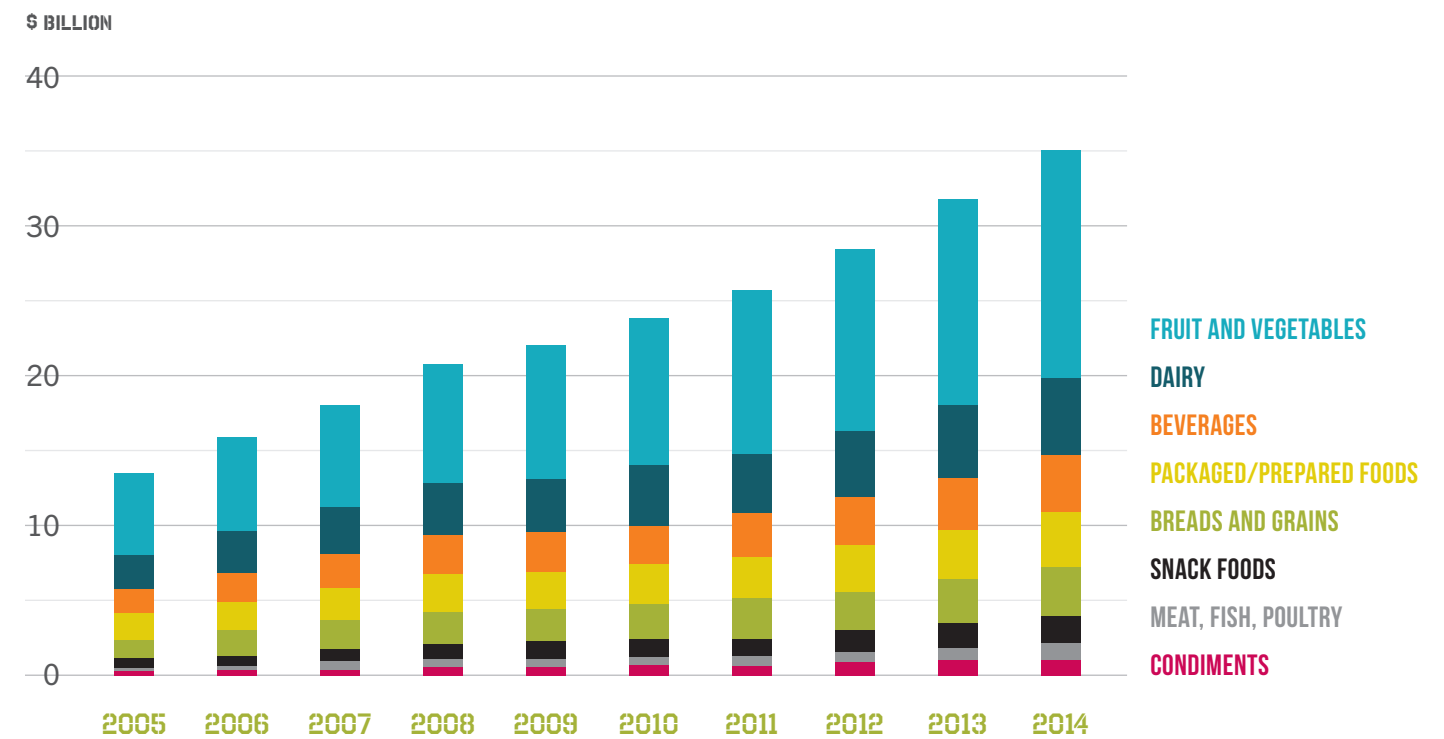
## FARM-TO-TABLE AND ORGANIC

Over the past decade, there has been an evident movement towards farm-to-table and organic food products. The idea that the less time and fewer hands it takes for the food to get from the farm to table, the fresher and more environmentally sensitive and community minded it is. Foodies of today are also in search of something exotic, memorable or new to explore during their dining experience. This has helped transform cuisine searches into an adventure — and something as simple as food trucks — into a following and culture of its own. Consumers of today enjoy food and beverages very differently as in the past. They are more eager to review, blog and post to YouTube, Vine and Instagram visually sharing their meals relating to their consumption interests and aspirations. (*Forbes*, Dec. 2014)

A recent Consumer Reports survey (Organic food labels, 2014) showed that 84% of American Consumers purchase organic foods. In fact, the USDA estimates that the organic food market will have sales topping \$35B in 2014. Organic sales now account for a 5% share of the total food market.

OVER THE PAST DECADE,  
THERE HAS BEEN AN EVIDENT MOVEMENT TOWARDS  
FARM-TO-TABLE  
& ORGANIC FOOD  
PRODUCTS.

## U.S. ORGANIC FOOD SALES BY CATEGORY, 2005-14



Note: E = estimate Source: USDA, Economic Research Service using data from Nutrition Business Journal

Most organic sales (93%) take place through conventional and natural food supermarkets and chains. The Organic Trade Association (OTA) estimates the remaining 7 % of U.S. organic food sales occur through farmers’ markets, foodservice, and marketing channels other than retail stores. The number of farmers’ markets in the United States has grown steadily from 1,755 markets in 1994, when USDA began to track them, to over 8,268 in 2014, a 1.5 % increase from 2013. (*State of the Industry*, OTA).

Consumers are purchasing healthier foods and have taken action against food and beverage manufacturers and retailers for falsely marketing products as “health foods” or “all natural” when they are clearly neither healthy nor natural. It’s undeniable that convenience plays a huge role in consumer’s purchasing behavior but research shows that individuals will spend more money for better quality foods. “We often value cheap, quick food and turn a blind eye to where it comes from. As a consumer, I want to support restaurants, businesses and corporations that are trying to change our food system for the better.” Anne Gibbons, 21, from Evanston, Ill. (*Best and worst fast-food restaurants in America*, *Consumer Reports Survey*). Simply and effectively communicating benefits is essential for consumers and a big trend this year,” said Lynn Dornblaser, Director of Innovation and Insight at Mintel, the Chicago-based market research agency.

To satisfy today’s consumer, numerous restaurants including fast casual and fast food chains have taken considerable measures to improve their standards. McDonald’s, the world’s largest restaurant chain, said it would gradually stop buying chicken raised with antibiotics used to treat human infections during the next two years. Giant retailer Costco Wholesale, which sells 80 million rotisserie chickens annually, recently announced it is working with suppliers to restrict antibiotics in chicken and meat. Chick-fil-A also made the announcement that it was cleaning up its menu by reducing potentially harmful ingredients including dyes, high fructose corn syrup and antibiotics in its popular chicken. Panera Bread has taken a big step towards healthier menu initiatives and recently announced that by the end of 2016, artificial additives, sweeteners, and preservatives will be removed from the food in their bakery-cafes. (*Panerabread.com*)



FARM-TO-TABLE, ORGANIC AND SNOW  
MAKING THE CONNECTION

Sourcing food locally cuts down on the environmental damage caused by moving products long distances from their source and provides consumers with fresher and most likely better tasting food products. The farm to table movement is a great way for snow sports business to get involved by providing and incorporating locally sourced product and healthier/organic food alternatives in and around snow sports destinations. With the right targeted marketing, healthful organic foods could become the preferred choice of nutrition for skiers & riders at every resort. Options such as smoothie bars, vegan and vegetarian foods, and a variety of organic choices could elicit a greater favorability among participants and visitors – as they have done in many of the Vail Resorts. With a variety of organic dining options providing high quality energy, on and off the mountain, skiers & riders would have no trouble lasting from that first chair to the last. Including an organic food section to the resort’s mobile app could be a helpful way to send participants push notifications of the delicious organic specials running for any particular day – enticing them to come in and try these fresh delicacies!

Associating snow sports with these food trends is a chance to connect with consumers on shared values including protecting the environment and promoting healthy lifestyle choices. In fact, the group labeled “foodies,” persons who have high levels of interest in categories like gourmet food, in cooking, in organic and natural foods, and cultural food trends are in many of the same demographic categories that skiers and snowboarders fall into; highly educated and higher than average income. In fact, Salt Lake City, Boston, Seattle, Portland, OR, and Denver made the top 25 cities for foodies in the U.S. (Travel and Leisure’s Top 30 Cities for Foodies 2014). We do not currently measure crossover between skiers and riders and foodies, but based on shared values and demographics, it is likely that crossover is high.

With the recent popularity of festivals of all types including music, food, beer and wine, more mountain resorts are featuring enticing culinary events drawing only mountain enthusiasts and destination foodies and festival seekers. Leading the way is Vermont, the state with the most craft breweries per capita in the United States. Mount Snow’s Annual Brewer’s Fest features beer, music and BBQ with 50 breweries pouring beers and ciders from 90+ taps. It’s no surprise that live music and great food attracts thousands of beer lovers to this Northeastern beer fest (mountsnow.com). Such events could be opportunities to market snow sports and the shared values of foodies and snow sports participants to groups coming to resorts for these events.

Festivals at ski/snowboard resorts featuring tastings of local products prepared by the resort’s most talented chefs would be a great way to offer a culinary-inspired alternative for skiers and snowboarders who have significant others, family members, etc. who do not participate in snow sports. This type of event may be a great way to have a winter vacation even if not all involved will be focused on snow sports. Additional hosting a festival in the summer and perhaps in the winter too, can generate additional revenue for the resort and has the potential to attract more people to snow sports.

THE NUMBER OF **FARMERS’ MARKETS** IN THE UNITED STATES HAS GROWN STEADILY FROM **1,755** MARKETS IN 1994, WHEN USDA BEGAN TO TRACK THEM, TO OVER **8,268** IN 2014, A **1.5 % INCREASE FROM 2013.**

IT’S UNDENIABLE THAT  
CONVENIENCE PLAYS A HUGE ROLE  
IN CONSUMER’S PURCHASING  
BEHAVIOR BUT RESEARCH SHOWS  
THAT INDIVIDUALS WILL  
**SPEND MORE MONEY  
FOR BETTER QUALITY FOODS.**

**ORGANIC  
SALES**  
NOW ACCOUNT FOR A  
**5% SHARE**  
OF THE TOTAL FOOD MARKET.

**FOODIES OF TODAY**  
ARE ALSO IN SEARCH OF SOMETHING  
EXOTIC,  
ADVENTURESOME,  
MEMORABLE  
OR NEW  
TO EXPLORE  
DURING THEIR DINING EXPERIENCE.

WITH THE RIGHT TARGETED  
MARKETING, HEALTHFUL  
ORGANIC FOODS COULD BECOME  
THE PREFERRED CHOICE  
OF NUTRITION FOR SKIERS &  
RIDERS AT EVERY RESORT.





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