

SIA Snow Sports Industry Insights Study



Snowsports
Industries
America

SIA Snow Sports Industry
Insights Study

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Introduction

The Snow Sports Industry Insights Report is a compilation of research from a number of snow sports industry studies, including snow participation data and demographics*, general market trends, equipment sales, crossover activities and more. Published annually at the start of each snow season, this report is aimed to serve as a reference tool for the snow sports industry.

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*Participation information is derived from data produced by the Physical Activity Council (PAC), a partnership of six of the major trade associations in US sports.



KEY INSIGHTS

Look for the 'snowflake' icons that call out key insights.



Winter Market Summary

Winter Participation by Activity



DOWNHILL SKIING

11.8 Million

11.8 Million Americans report that they are active downhill skiers



SNOWBOARDING

7.6 Million

7.6 Million Americans report that they are active snowboarders



XC SKIING

5.1 Million

5.1 Million Americans report that they are active cross-country skiers



SNOWSHOE

3.7 Million

3.7 Million Americans report that they went snowshoeing



SLEDDING

8 Million

8 Million Americans report that they went sledding



KEY INSIGHT

100 Million Americans are active outdoors throughout winter (hiking, running, walking, skating)

Winter 2016/2017

General Market Trends

Estimated Retail Channel Sales*

All Channels: \$4.3B

Specialty: \$2.4B

Online: \$975M

Chain: \$910M

Direct-to-Consumer Sales

Direct-to-consumer sales are on the rise among snow sports equipment

Weather

Weather remains the most significant variable in Snow Sports for decades

Independent Retailers

Big box chain stores are losing ground to independent retailers & local stores

Northeast retailers had a better season than 2015/2016

Destination Resorts

Destination resorts featuring high-end product demos are on the rise

Specialty Shops in the West proximal to resorts sold well into the spring





Snowboarding = Surfing

New snowboard archetypes that favor environmental sensitivity, organic food and materials, and focus on sustainability are gaining attention



Carving Skis

Backing away from the fat,
120mm ski waist widths

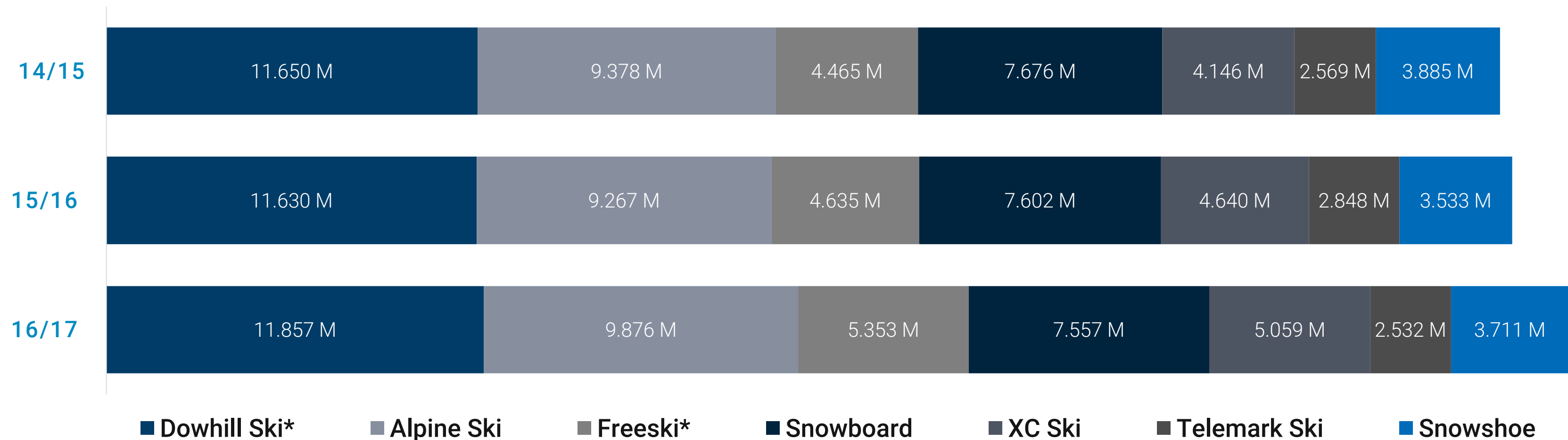


Backcountry & Uphill

More participants & more gear
across market channels

US Participation By Winter Sport

PARTICIPANTS FOR EACH SNOW SPORTS DISCIPLINE, WINTER 2014 - 2017



* Alpine Ski & Freeski with crossover removed

* Freeski defined as at parks, pipes, hand rails park and pipe, natural and man-made terrain features



KEY INSIGHT

Participation grew across the board in Alpine Ski, Freeski, XC Ski, and Snowshoe



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Alpine Skiing

Pages 7-16

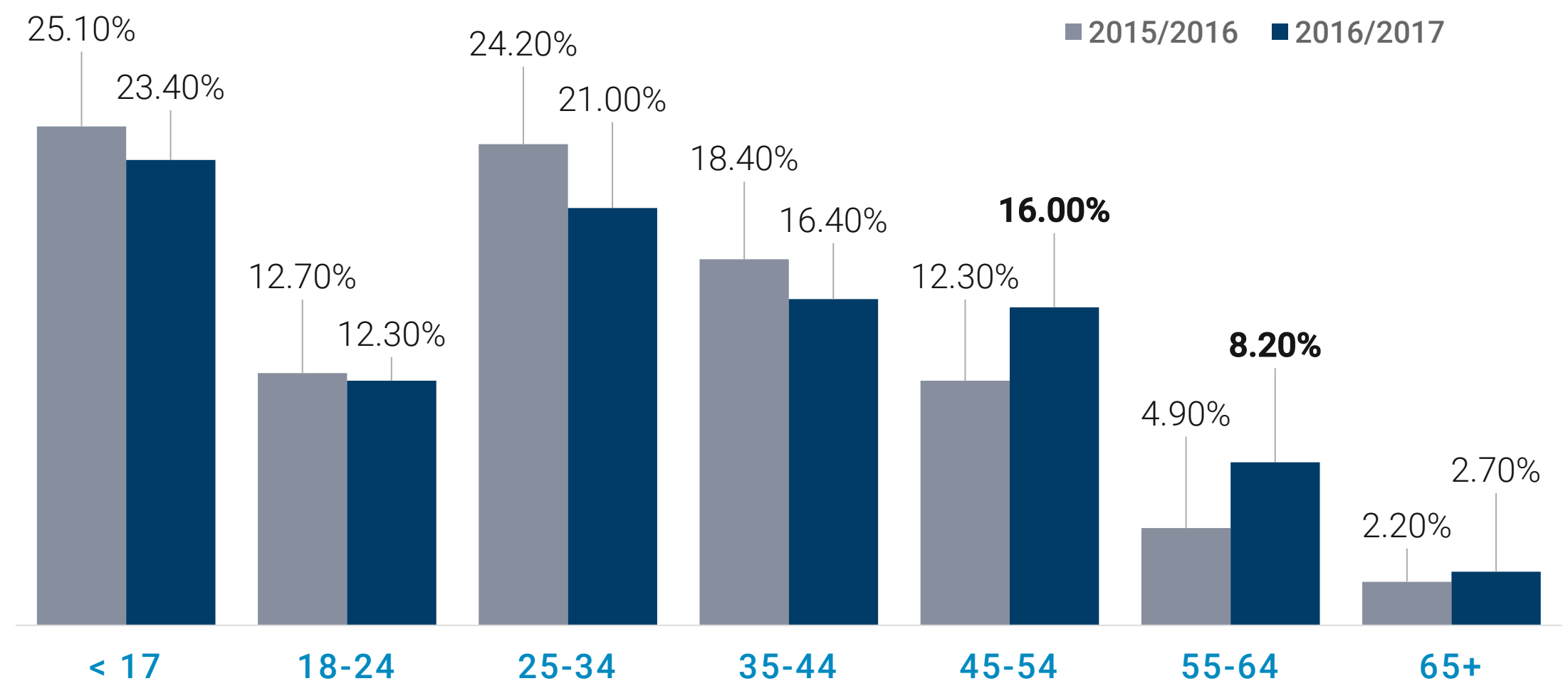


Alpine Ski Participant Age Trends



KEY INSIGHT

As a percentage of Alpine Skiers, the 45- 54 and 55-64 age groups grew



Reference: Physical Activity Council (PAC) Survey, 2017

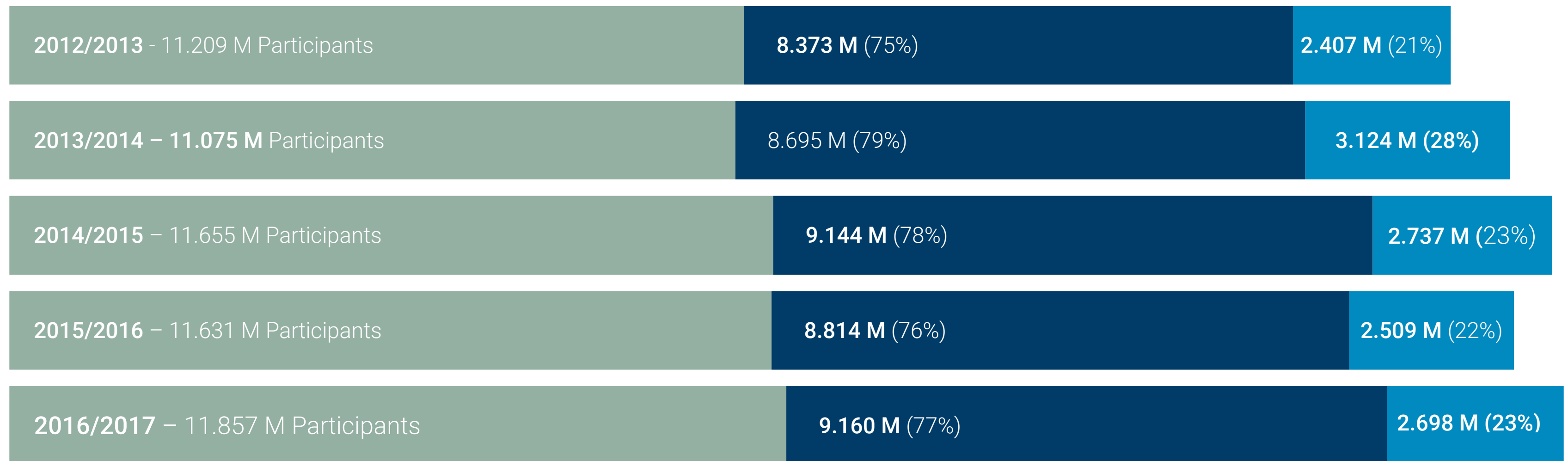
How Often Do People Ski?



KEY INSIGHT

2016/2017 saw the greatest number of participants over the last 5 years

DOWNHILL PARTICIPANTS, WINTER 2012-2017



1+ Days
 2+ Days
 9+ Days

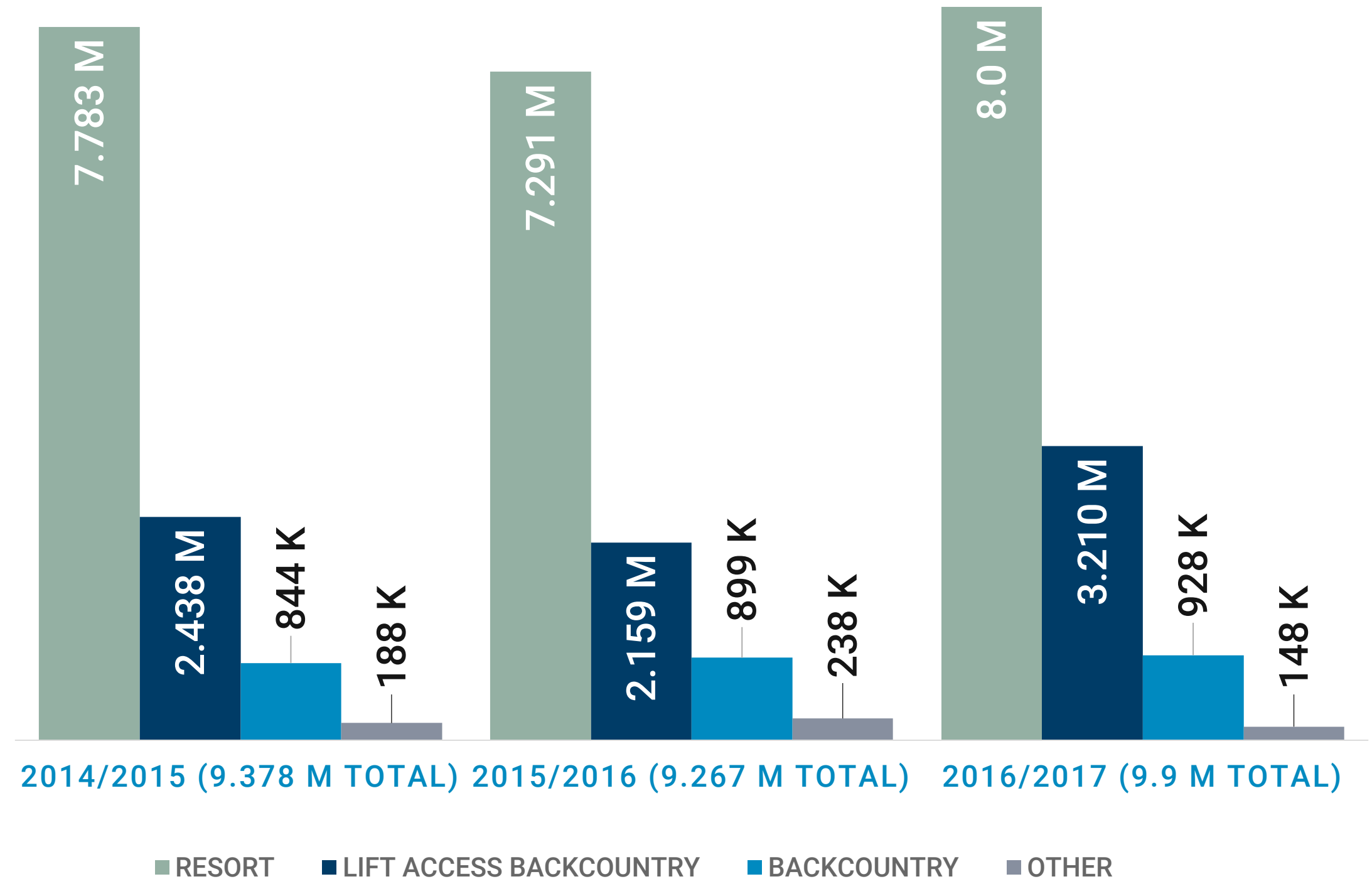
Reference: Physical Activity Council (PAC) Survey, 2017

Where Do Skiers Ski?



KEY INSIGHT

There's a growing interest in backcountry skiing, both lift and trail access



Reference: Physical Activity Council (PAC) Survey, 2017



Most Popular Other Activities For Alpine Skiers

Walking for Fitness: 38.8%

Hiking (Day): 35.8%

Treadmill: 34.9%

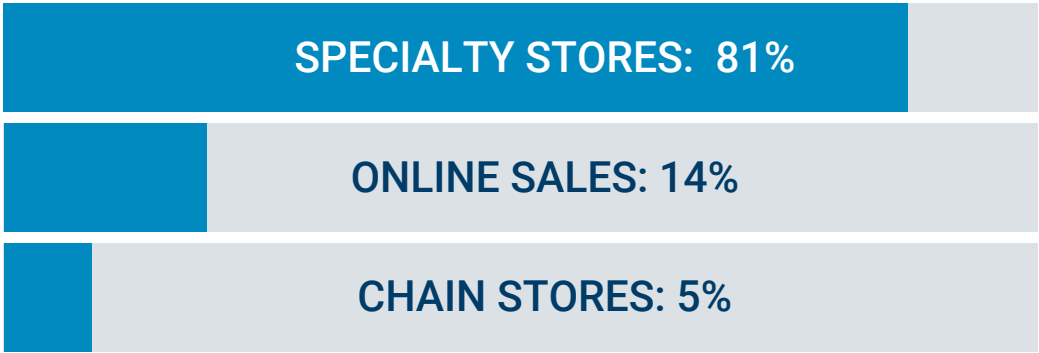
Running/Jogging: 34.5%

High Impact/Intensity & Training: 32.5%

Elliptical Motion Trainer/Cross-Trainer: 32.5%

Dumbbells: 30.5%

Alpine Equipment Sales at Retail



KEY INSIGHT
Estimated Alpine Equipment Retail Sales were \$592 Million*

*Reference: SIA Estimates based on former wholesale data and former retail data from NPD



Alpine Wholesale Numbers

Units

ALPINE SKIS: -8.3%
ALPINE BOOTS: -10.3%
ALPINE BINDINGS: -12.2%

Dollars

ALPINE SKIS: -7.3%
ALPINE BOOTS: -4.6%
ALPINE BINDINGS: -12.1%

Alpine Equipment Trends

SKI WIDTHS

Ski waist widths are narrowing. Skis with 90mm to 100mm waist width are best sellers

SKI TECH

Skis are lighter & stronger using new materials including: flax, carbon, & new construction techniques. Examples: Rossignol Ski and Soul Series, Blizzard Black Pearl, Salomon QST

Key Models: Skis

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Rossignol Soul 7 HD



Black Crows Corvus



Blizzard Cochise



Nordica Enforcer Pro



Salomon QST Lux 92 Ski



DPS Nina 99

Key Models: Ski Boots

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Atomic Hawx Ultra



Tecnica Mach 1



Salomon X Pro



APEX XP



Lange RX 110 LV



Salomon X Pro Custom Heat

Key Models: Ski Bindings

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Marker Griffon



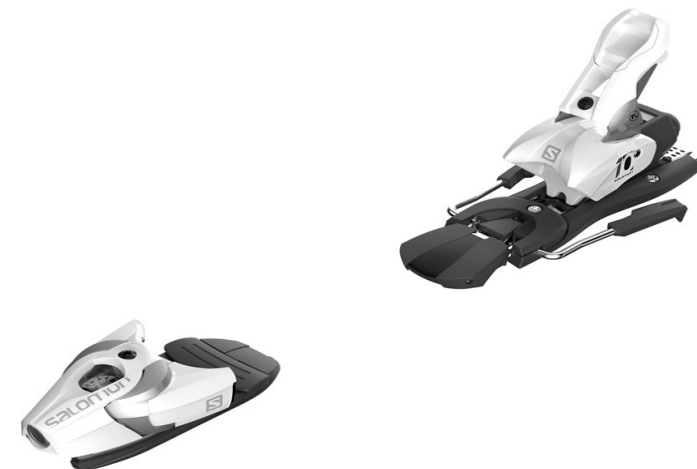
Tyrolia AAAttack 18



Salomon Warden MNC



Marker Squire



Salomon Z10 TI



Tyrolia AAAttack 12



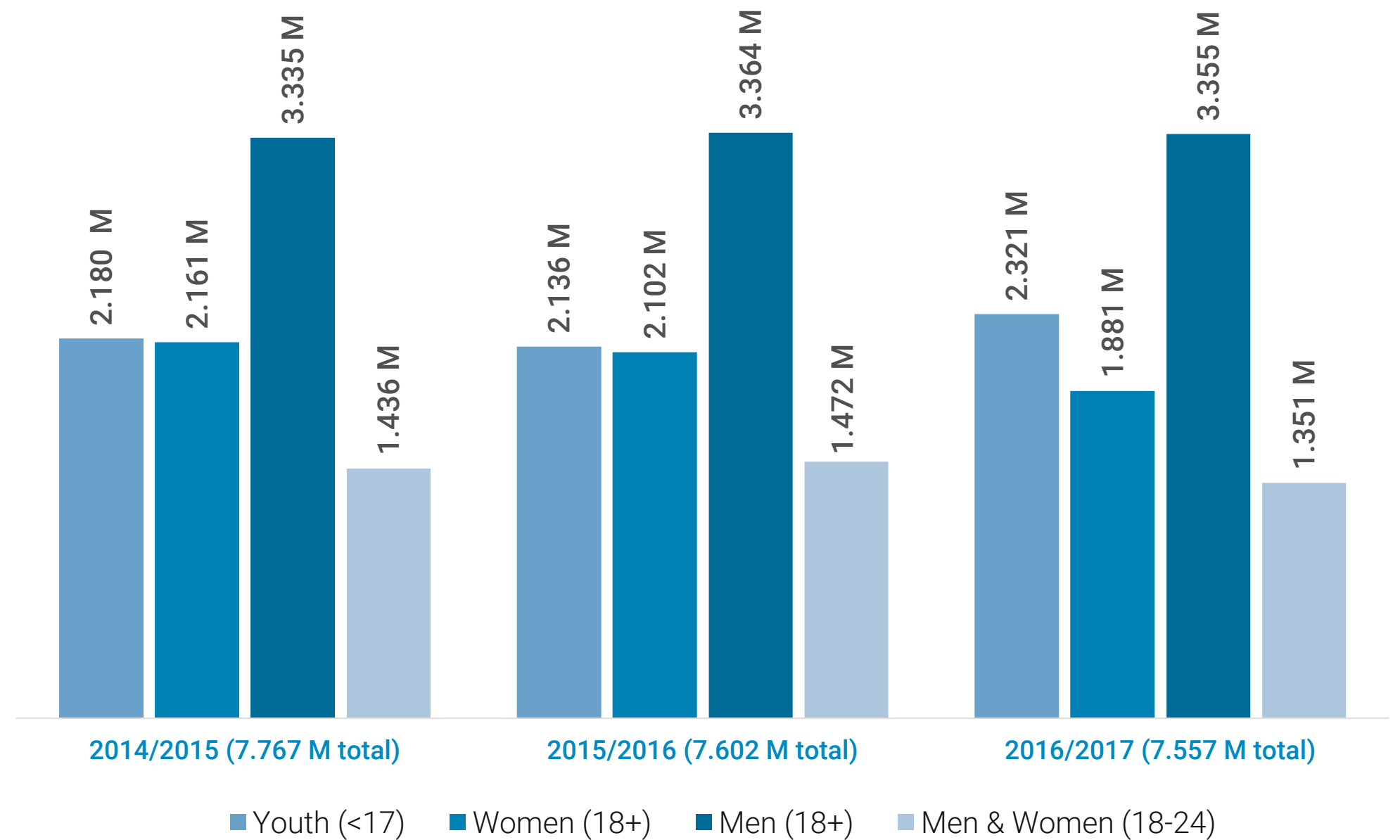
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Snowboarding

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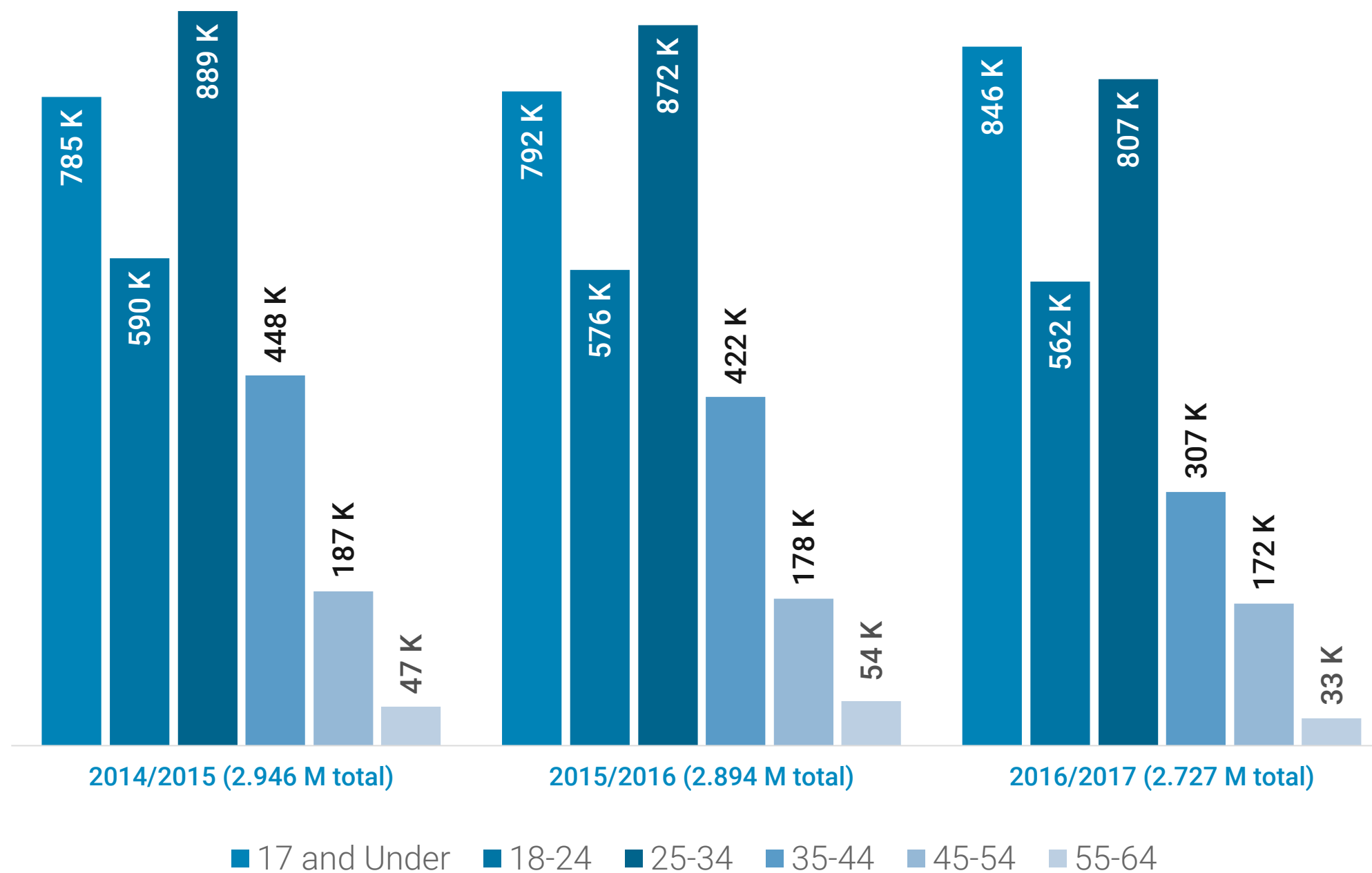
Snowboard Participant Age Trends



KEY INSIGHT

The one area that saw growth in participation was in youth (Under 17)

Female Snowboard Participant Age Trends



Reference: Physical Activity Council (PAC) Survey, 2017



KEY INSIGHT

Growth in female 17 & under

Snowboard Participant Diversity Trends



2014 / 2015 7.676 Million Participants



2015 / 2016 7.602 Million Participants



2016 / 2017 7.557 Million Participants



- White/Caucasian (Not Hispanic)
- Asian/Pacific Islander
- Latino/Hispanic
- Black (Not Hispanic)
- Other/Not Specified



KEY INSIGHT

Asian/Pacific Islanders and Latinos/Hispanic make up 30% of the total participants

Reference: Physical Activity Council (PAC) Survey, 2017

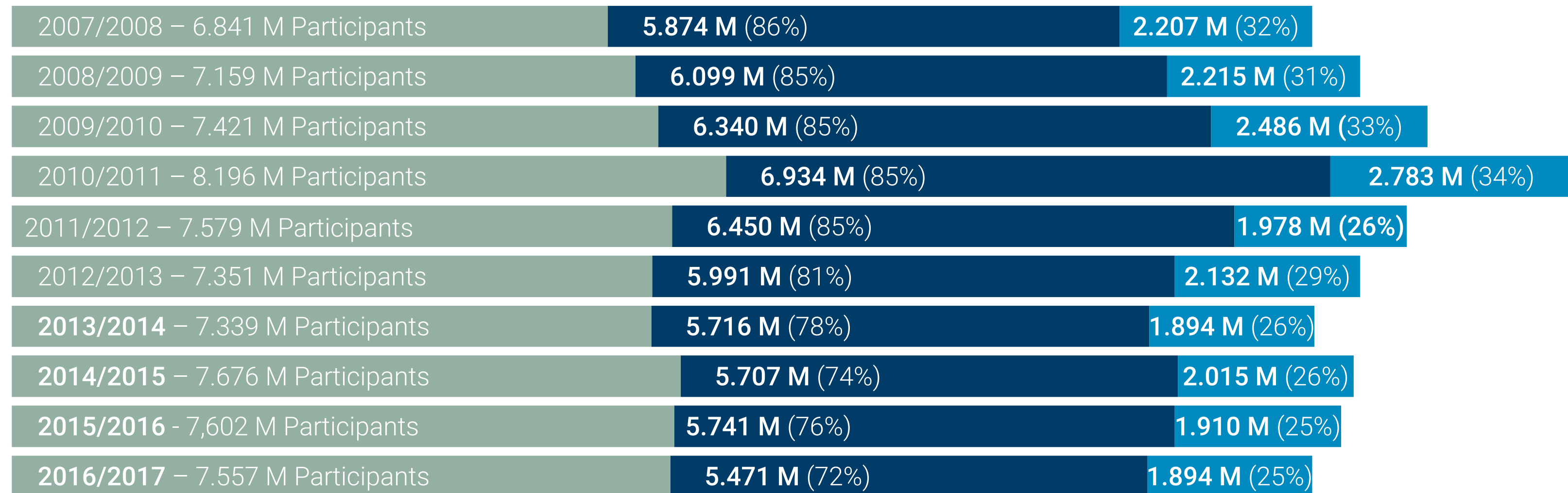
SNOWBOARD PARTICIPANTS, WINTER 2012-2017

How Often Do People Snowboard?



KEY INSIGHT

Percentage of snowboarders going more than once is trending down



1+ Days 2+ Days 9+ Days

Reference: Physical Activity Council (PAC) Survey, 2017

SNOWBOARD PARTICIPANTS, WINTER 2012-2017

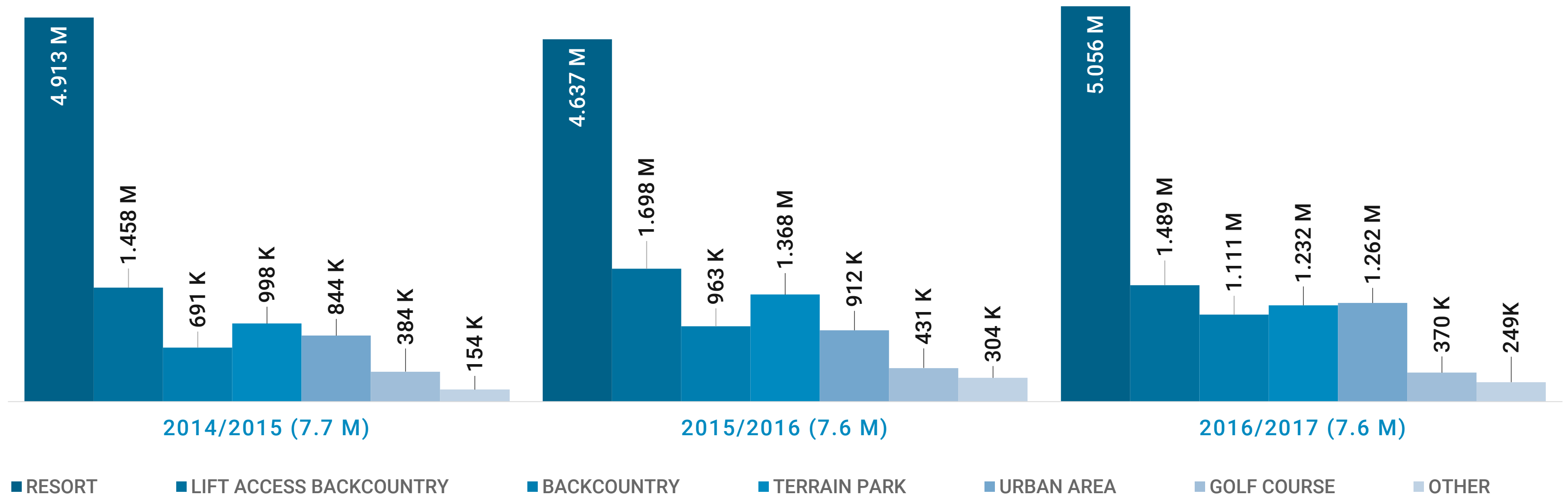
Where do Snowboarders Ride?



KEY INSIGHT

More snowboarders are riding in urban areas than before

Reference: Physical Activity Council (PAC) Survey, 2017



Most Popular Other Activities for Snowboarders

Treadmill: 38.9%

Running/Jogging: 38.9%

Bowling: 38.7%

Basketball: 35.9%

High Impact/Intensity & Training: 35.5%

Hiking (Day): 35.5%

Walking for Fitness: 35.3%



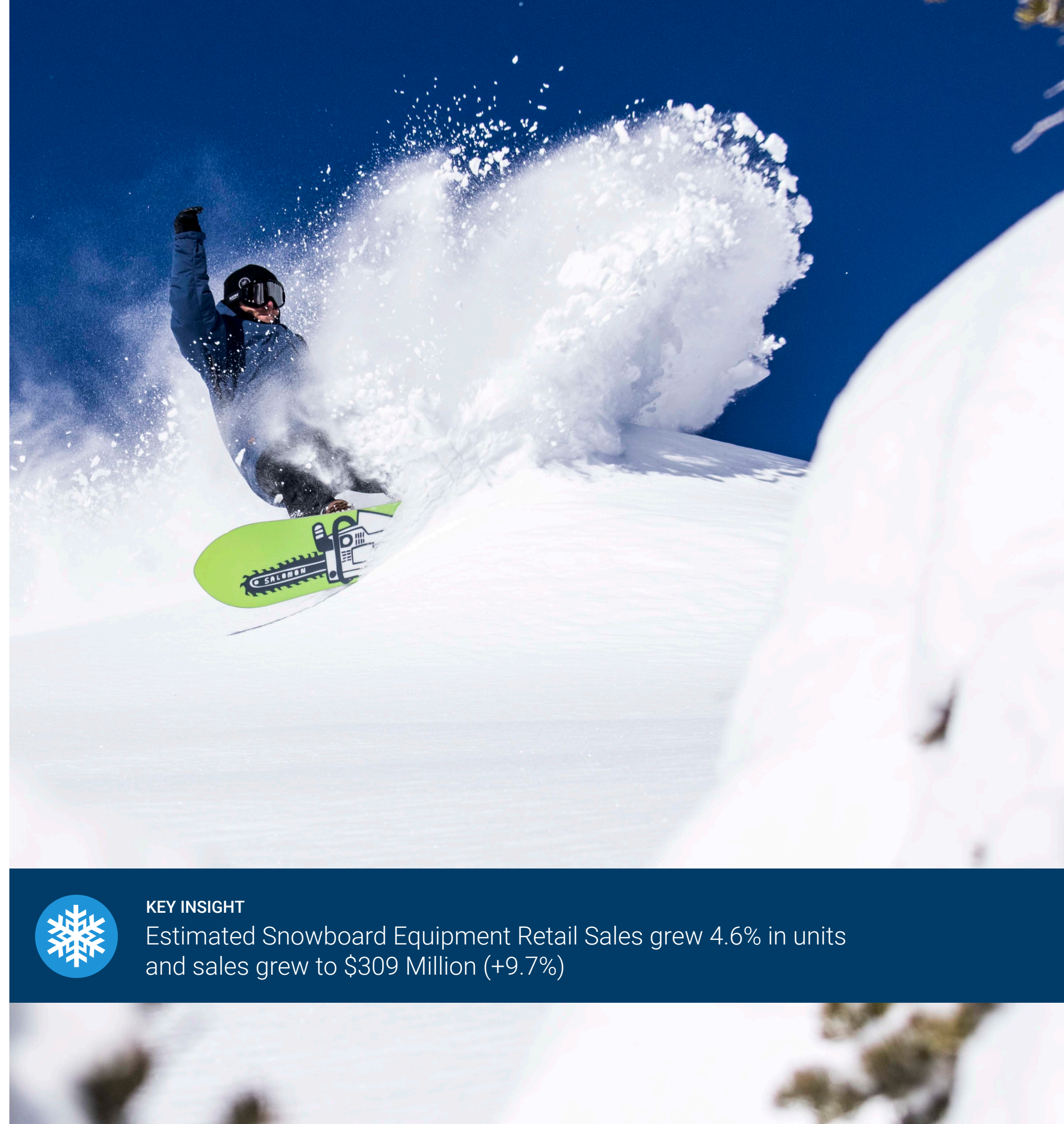
Snowboard Equipment Sales at Retail

- Estimated 409K Boards Sold
- Estimated 545K Boots Sold
- Estimated 499K Bindings Sold



KEY INSIGHT

Estimated Snowboard Equipment Retail Sales grew 4.6% in units and sales grew to \$309 Million (+9.7%)



Key Models: Snowboards

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Burton Skeleton Key



Capita Navigator



Never Summer West



Jones Lone Wolf



GNU Klassy



Burton Lip Stick

Key Models: Snowboard Boots

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Salomon Hi-Fi



Adidas Tactical ADV



Vans Sequal



Burton Ion Boa



Thirty-Two Zephyr FT



Burton Felix Boa

Key Models: Snowboards Bindings

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Nitro Team



Burton Step On



Union Falcor



Flow NX2-GT



Burton Lexa



Union Milan



Snowboard Market Trend Summary



KEY INSIGHT

Equipment sales are up, even though overall participation fell

Participation Fell

Snowboard participation fell slightly last season from 7.6M to 7.56M snowboarders

Youth Snowboarding On-the-Rise

The Youth (17 and Under) is the only age category that grew in participants last season; 28% of all snowboarders are juveniles and 36% of snowboarding kids are girls

Online & Direct-to-Consumer

Online and direct-to-consumer sales are more than a third of all equipment sales

Equipment Sales Are Up

SIA estimates that snowboard equipment sales in units were up 4.6% to \$309M; Included 409K boards, 5.3K splitboards, 545K boots, and 499K bindings



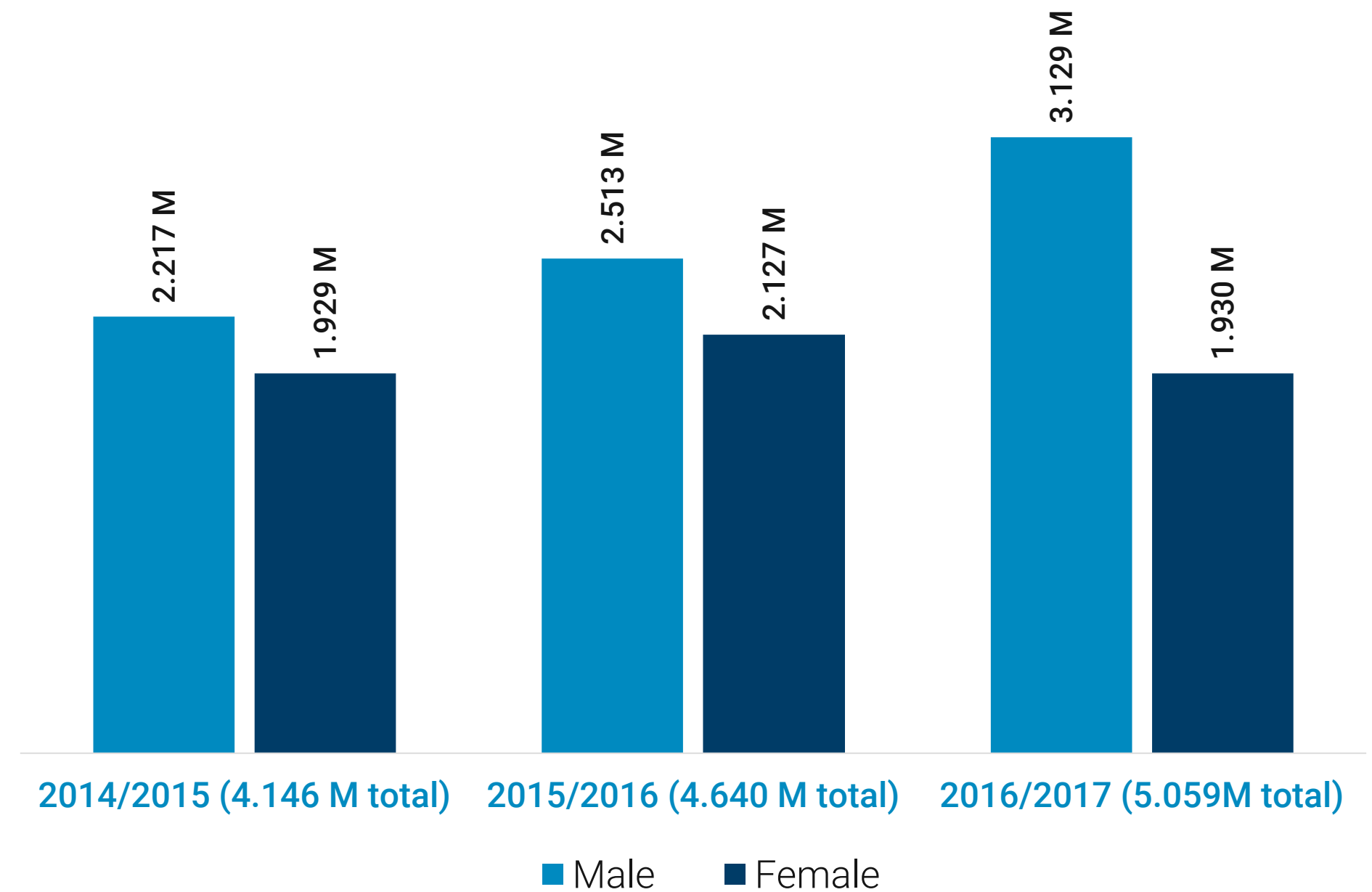
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XC Ski

Pages 29-38



XC Ski Participant Gender Trends



KEY INSIGHT

The number of men participating in XC Ski grew

XC Ski Participant Diversity Trends



2014 / 2015 - 4.146 Million Participants



2015 / 2016 - 4.640 Million Participants



2016 / 2017 - 5.059 Million Participants



- White/Caucasian (Not Hispanic)
- Asian/Pacific Islander
- Latino/Hispanic
- Black (Not Hispanic)
- Other/Not Specified



KEY INSIGHT
XC Ski saw 2% growth among
Latinos/Hispanic

Reference: Physical Activity Council (PAC) Survey, 2017



Most Popular Other Activities for XC Skiers

High Impact/Intensity & Training: 51.1%

Walking for Fitness: 42.3%

Elliptical Motion Trainer/Cross-Trainer: 39.6%

Bicycling (Road/Paved Surface): 39.1%

Bowling: 38.6%

Treadmill: 38.4%

Hiking (Day): 38.4%

WINTER 2016/2017

XC Ski Equipment Sales

Wholesale Units

- Nordic Skis: -11.6%
- Nordic Boots: -13%
- Nordic Bindings: -17%

Wholesale Dollars

- Nordic Skis: -12%
- Nordic Boots: -11.9%
- Nordic Bindings: -8.4%

Reference: SIA 2017 Sales Survey Cross-Country Hard Goods Year-to-Year Report





Crossover Sports

Growing apparel crossover with road cycling, trail running, and triathlon



Household Income

41% of cross country skiers have household income above \$100K



Increase in Participation

More than 5M report participating in cross country in 2016/2017 compared to 4.6M in 2015/2016



Wholesale Orders

More than 37% in wholesale orders for XC skis were XC systems



Multi-Use Winter Trails

Fat bikes are used on cross country trails

Key Models: XC Skis

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Fischer Speedmax Skate



Rossignol Ultra Lite Waxless-IFP



Salomon S/Lab Carbon SK



Atomic Redster C9 Skintec X-Hard



Madshus Nordmarka Classic



Alpina Control 64 Touring

Key Models: XC Boots

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Fischer XC Control



Rossignol X-IUM Carbon



Salomon SIAM 7 Pilot CF



Atomic Motion 25



Madshus Glittertind BC



Alpina ECL Pro

Key Models: XC Poles & Bindings

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Swix Triac 2.0 IPM Carbon



Leki Genius Carbon



One Way Premio HD



Start Poles Loppet



Fischer Turnamic



Salomon SNS Propulse



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Alpine Touring & Backcountry

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Backcountry Terrain

900K Skiers and 1.1M snowboarders report skiing or snowboarding in non-resort backcountry terrain.



Uphill Access

According to NSAA, **50% of resorts allow uphill access**; 7% on an unlimited basis and 43% on a limited basis



Backcountry Gear

Backcountry is driving the trend toward lighter equipment across all categories of downhill ski and snowboard.

Key Models: Alpine Touring & Backcountry

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Black Diamond Helio 105



Marker Kingpin 13



G3 Alpinist Climbing Skin



Backcountry Access Tracker 2



Union Expedition Binding



Arbor Bryan Iguchi Pro Split

Winter 2016/2017

Fat Bikes

In the U.S. alone, about 8.5M mountain bike riders are out on the trails. We estimate that about 5% (400K+) are riding fat bikes with some regularity (Source: PAC Participant Data)

Last year, according to SportsScan Info data, more than 7K fat bikes were sold in specialty bike shops (not including online, chain, or D2C) in the U.S.





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Hardgood Accessories

Pages 43-45

Key Models: Helmets

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Oakley Mod 5



POC Fornix MIPS



Giro Discord



Smith Vantage MIPS



Pret Lyric X



Anon Nova MIPS

Key Models: Goggles

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Dragon NFX2



Giro Axis



Anon M3



Oakley Flight Deck XM Prizm



Smith Angel Sig. I/O



Zeal Fargo



SIA Snow Sports Industry Insights Study

Outerwear & Accessories

Pages 46-49



Winter 2016/2017

Trends in Ski Apparel

COLOR & FIT TRENDS LEAN CONSERVATIVE

Solid colors, color block, clean lines, and pockets are all trending, while direct-to-consumer and runway-to-consumer are changing the market

FABRIC INNOVATIONS & OTHER TRENDS

PFC Free, Surface Hardened™, biomimetic spider silk, and growth in waterproof/breathable

SMALL BRANDS GETTING NOTICED

Some brands like Strafe, Voormi, and Stio are getting noticed

Key Models: Outerwear

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



The North Face Chakal



Eider Shaper



Dakine Smyth II



Burton AK 2L Blade



Patagonia Snowbelle Insulated



Norrøna Svalbard Anorak

Key Models: Softgood Accessories

Winter 2017/2018 models have been selected by SIA to highlight a few key products that have been gaining attention.



Blackstrap Hood Balaclava



Buff Original Women's



Coal B.E.B Light



Burton AK Oven Mit



Hestra Leather Fall Line Women's



Arc'teryx Sabre Glove

Snowsports Industries America

Research, Education Participation.

SnowSports Industries America (SIA) is the national not-for-profit, member owned trade association representing the winter sports industry. Established in 1954, SIA's mission is to help the winter industry thrive. SIA delivers invaluable services and programs to its members.

For information on SIA membership:
Call **435-657-5140** or visit **snowsports.org** for more information.

SIA publishes a wide variety of research products for members including consumer data, wholesale Sales and Orders, Snow Sports Participation, Rental Equipment Purchasing, Compensation Reports and custom reports.

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