

SIA Snow Sports Industry Nordic 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.

The information contained in this Report is the property of SIA. It cannot be reproduced or extracted in whole or in part in any way without prior written permission of SIA.

*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

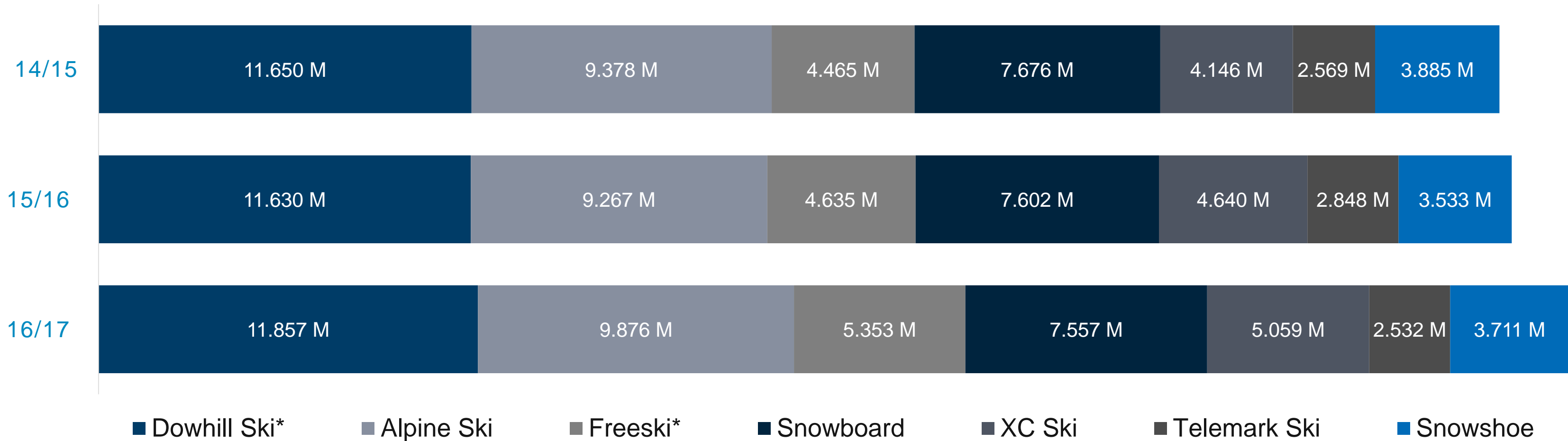
Destination resorts featuring high-end product demos are on the rise

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



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

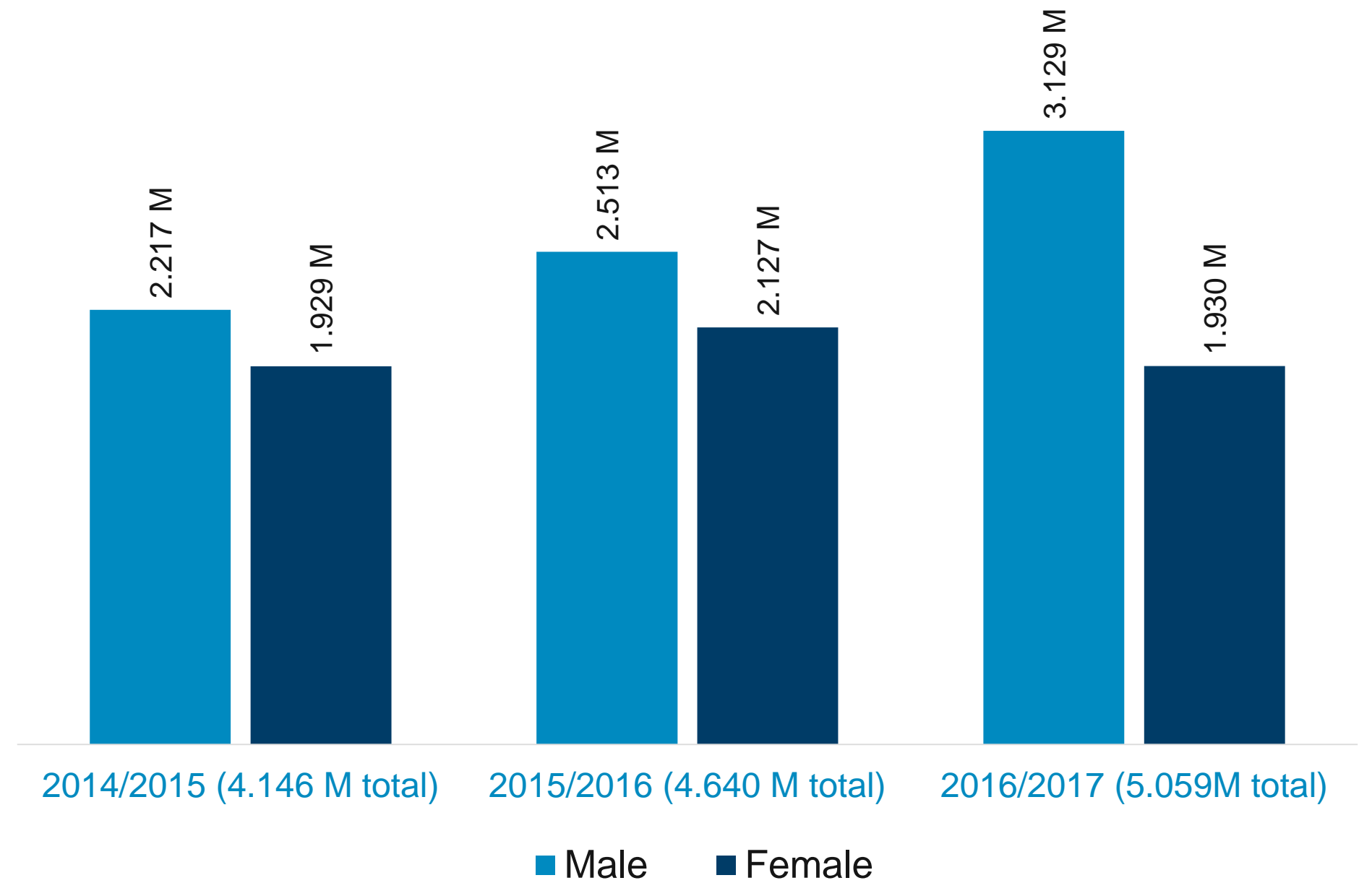


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XC Ski



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

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.

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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