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.
Winter Market Summary

Winter Participation by Activity

<table>
<thead>
<tr>
<th>Activity</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOWNHILL SKIING</td>
<td>11.8 Million</td>
</tr>
<tr>
<td>SNOWBOARDING</td>
<td>7.6 Million</td>
</tr>
<tr>
<td>XC SKIING</td>
<td>5.1 Million</td>
</tr>
<tr>
<td>SNOWSHOEING</td>
<td>3.7 Million</td>
</tr>
<tr>
<td>SLEDDING</td>
<td>8 Million</td>
</tr>
</tbody>
</table>

11.8 Million Americans report that they are active downhill skiers.
7.6 Million Americans report that they are active snowboarders.
5.1 Million Americans report that they are active cross-country skiers.
3.7 Million Americans report that they went snowshoeing.
8 Million Americans report that they went sledding.

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

<table>
<thead>
<tr>
<th>Season</th>
<th>Dowhill Ski</th>
<th>Alpine Ski</th>
<th>Freeski</th>
<th>Snowboard</th>
<th>XC Ski</th>
<th>Telemark Ski</th>
<th>Snowshoe</th>
</tr>
</thead>
</table>

* 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

Reference: Physical Activity Council (PAC) Survey, 2017
SIA Snow Sports Industry Insights Study

XC Ski
The number of men participating in XC Ski grew.
**XC Ski Participant Diversity Trends**

### 2014 / 2015 - 4.146 Million Participants

- **White/Caucasian (Not Hispanic):** 63%
- **Asian/Pacific Islander:** 10%
- **Latino/Hispanic:** 17%
- **Black (Not Hispanic):** 7%
- **Other/Not Specified:** 3%

Net Growth: -3%

### 2015 / 2016 - 4.640 Million Participants

- **White/Caucasian (Not Hispanic):** 63%
- **Asian/Pacific Islander:** 9%
- **Latino/Hispanic:** 17%
- **Black (Not Hispanic):** 7%
- **Other/Not Specified:** 4%

Net Growth: -4%

### 2016 / 2017 - 5.059 Million Participants

- **White/Caucasian (Not Hispanic):** 65%
- **Asian/Pacific Islander:** 7%
- **Latino/Hispanic:** 19%
- **Black (Not Hispanic):** 6%
- **Other/Not Specified:** 6%

Net Growth: -3%

---

**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%

Reference: Physical Activity Council (PAC) Survey, 2017
<table>
<thead>
<tr>
<th></th>
<th>Wholesale Units</th>
<th>Wholesale Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nordic Skis</td>
<td>-11.6%</td>
<td>-12%</td>
</tr>
<tr>
<td>Nordic Boots</td>
<td>-13%</td>
<td>-11.9%</td>
</tr>
<tr>
<td>Nordic Bindings</td>
<td>-17%</td>
<td>-8.4%</td>
</tr>
</tbody>
</table>

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

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

Crossover Sports
Growing apparel crossover with road cycling, trail running, and triathlon
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 (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.

For SIA Cross Country Ski inquiries:

Reese Brown, Nordic Director
802.236.3021
rborwn@snowsports.org