



# 2019 CCSAA Annual Meeting

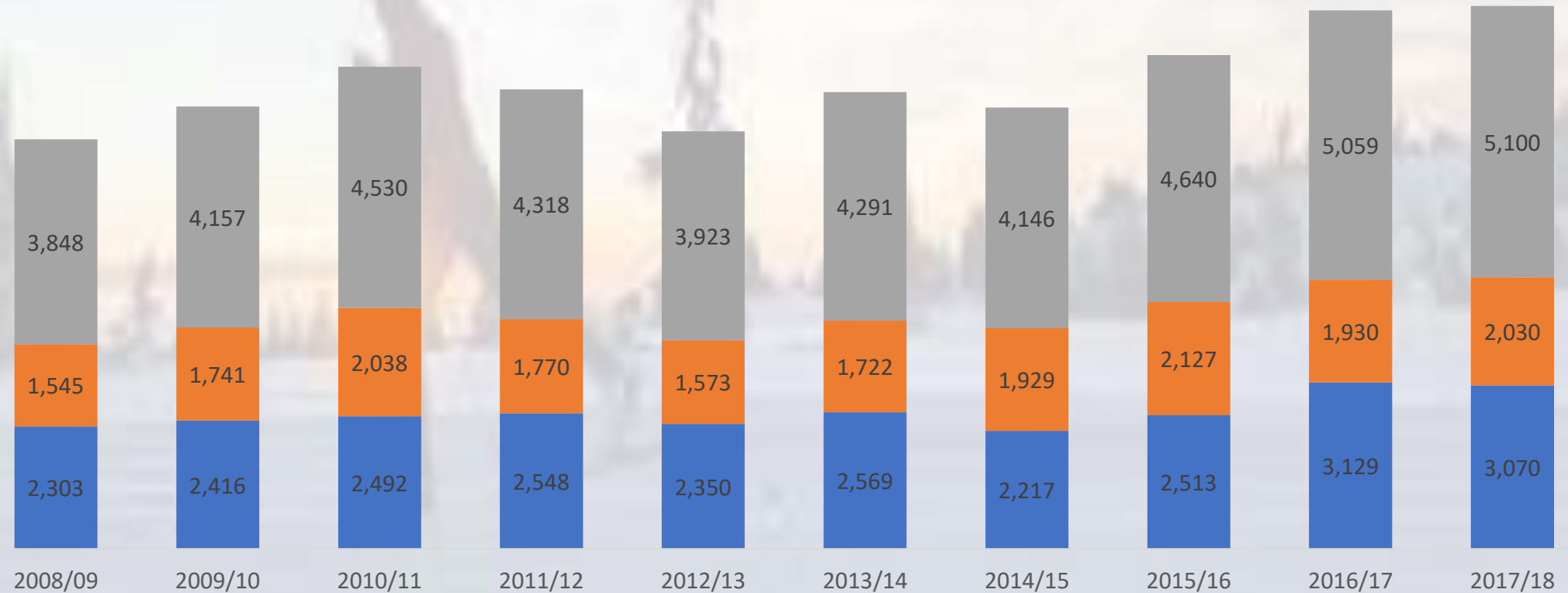
Lake Placid

# Executive Summary

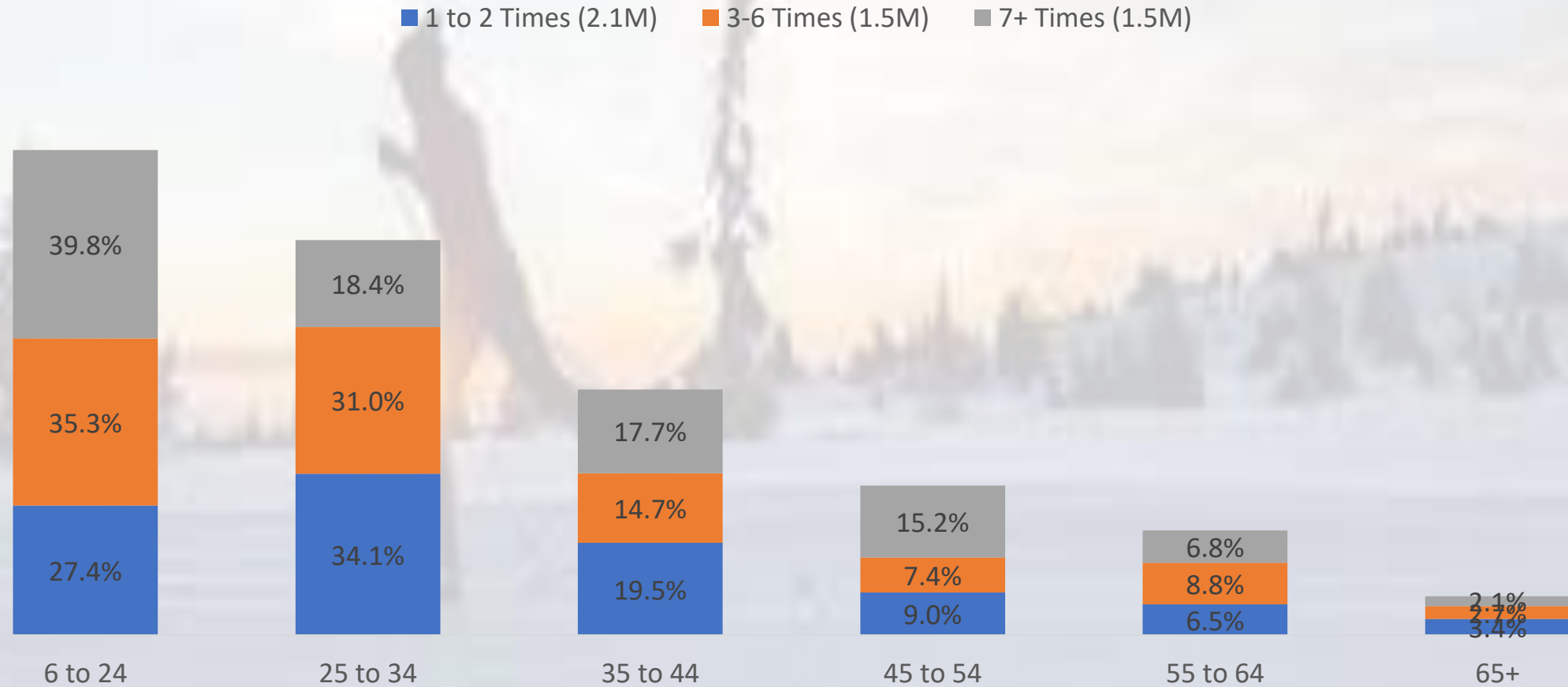
- Probably <1M core cross country skiers out of a total of 5.1M
- Cross country ski participation is highly correlated with winter weather
- Snowmaking may become a critical tool for the cross country ski market
- Trail alternatives like fat bikes and snowshoes help boost revenue
- Food, beverage and retail sales boost revenue
- Trail passes and Seasons Passes will continue to bring in the largest shares of revenue
- Opportunity to offer an alternative to downhill skiing that is *far less* expensive, healthier, and easier to access than downhill
- Thought for the future – Trail visits study, casual and core segmentation, snowmaking, trail alternatives, and....
- Discussion....

# Cross Country Participants

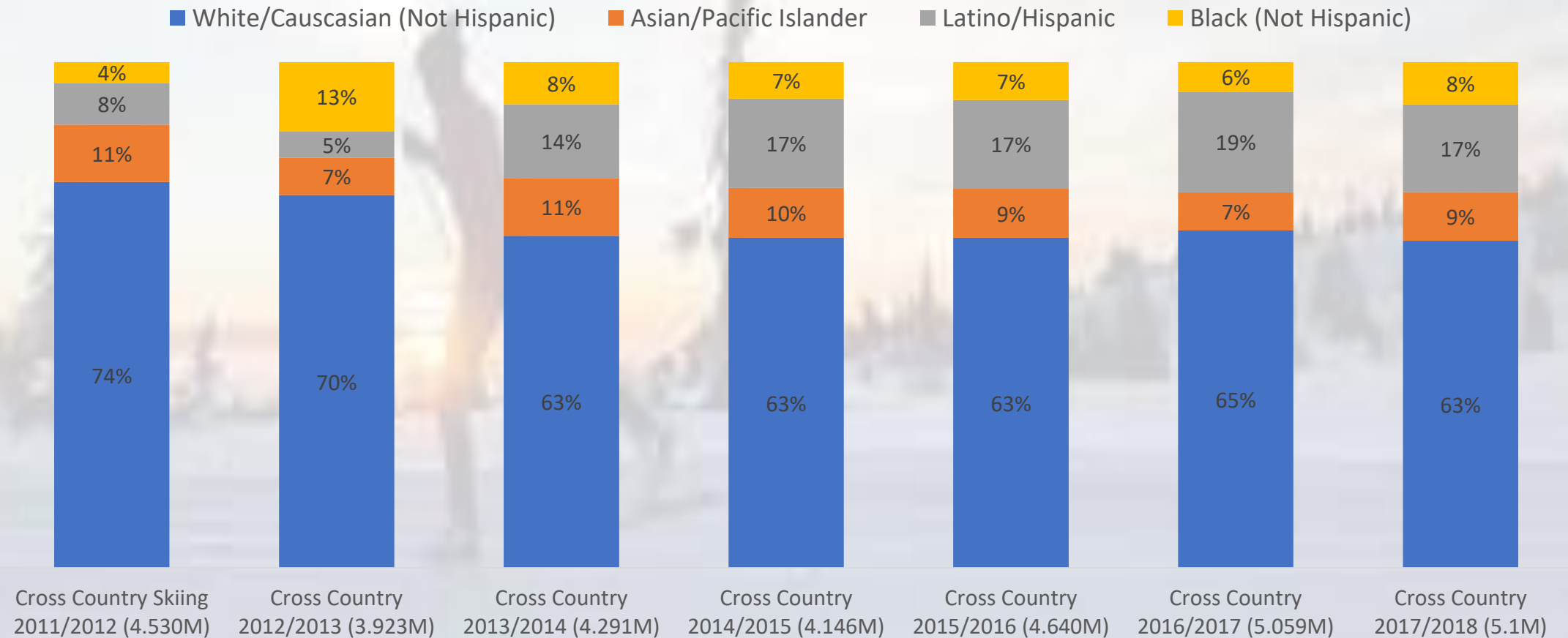
■ Male ■ Female ■ Total



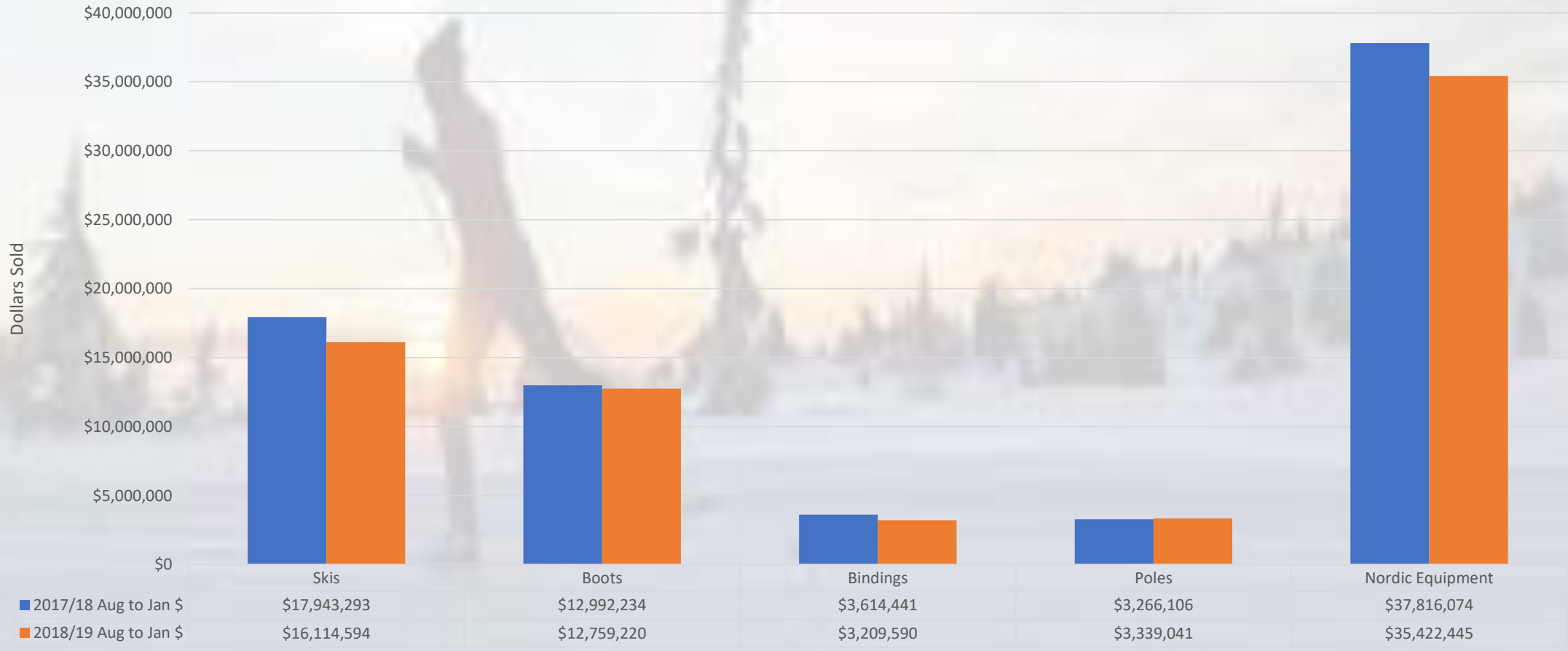
# Age and Frequency of Participation



# Diversity

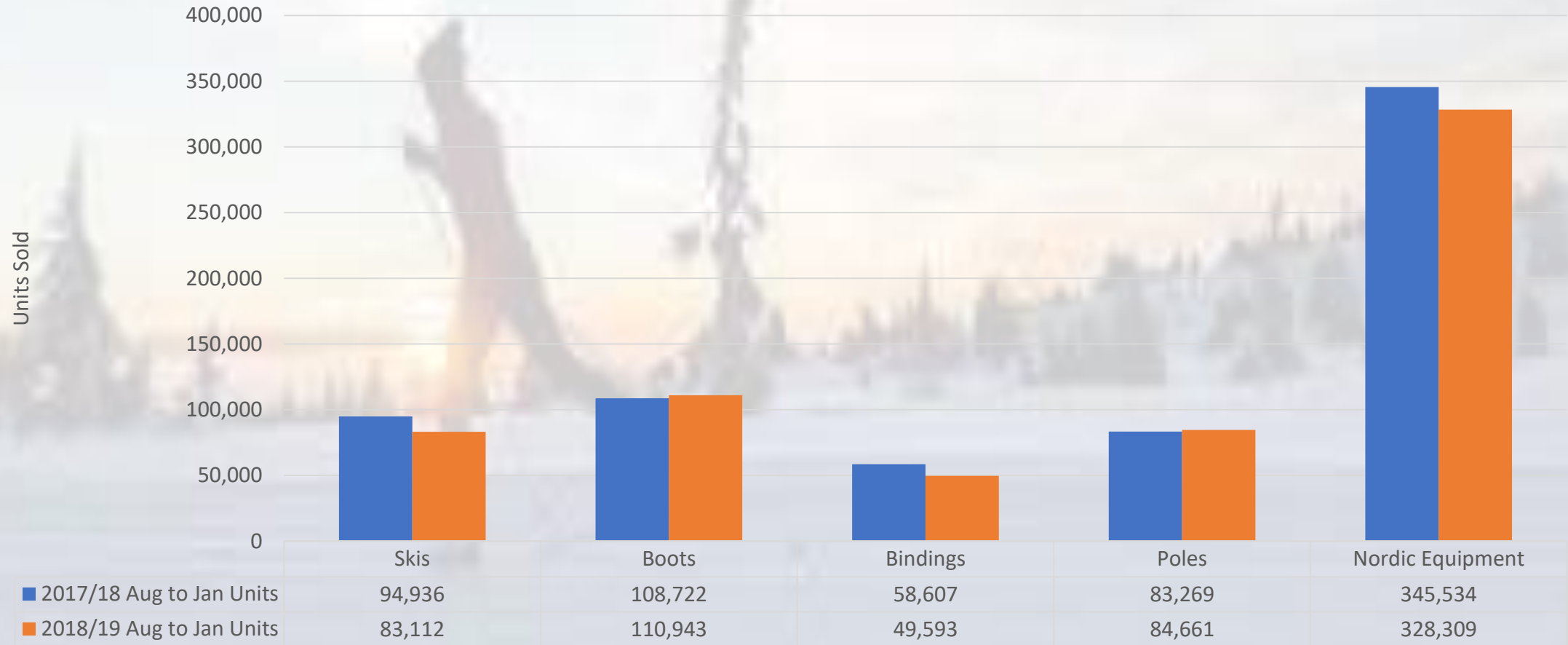


# Nordic Equipment Dollar Sales, August 2018 to January 2019



Source: NPD Retail Panel Data and SIA

# Nordic Equipment Unit Sales, August 2018 to January 2019



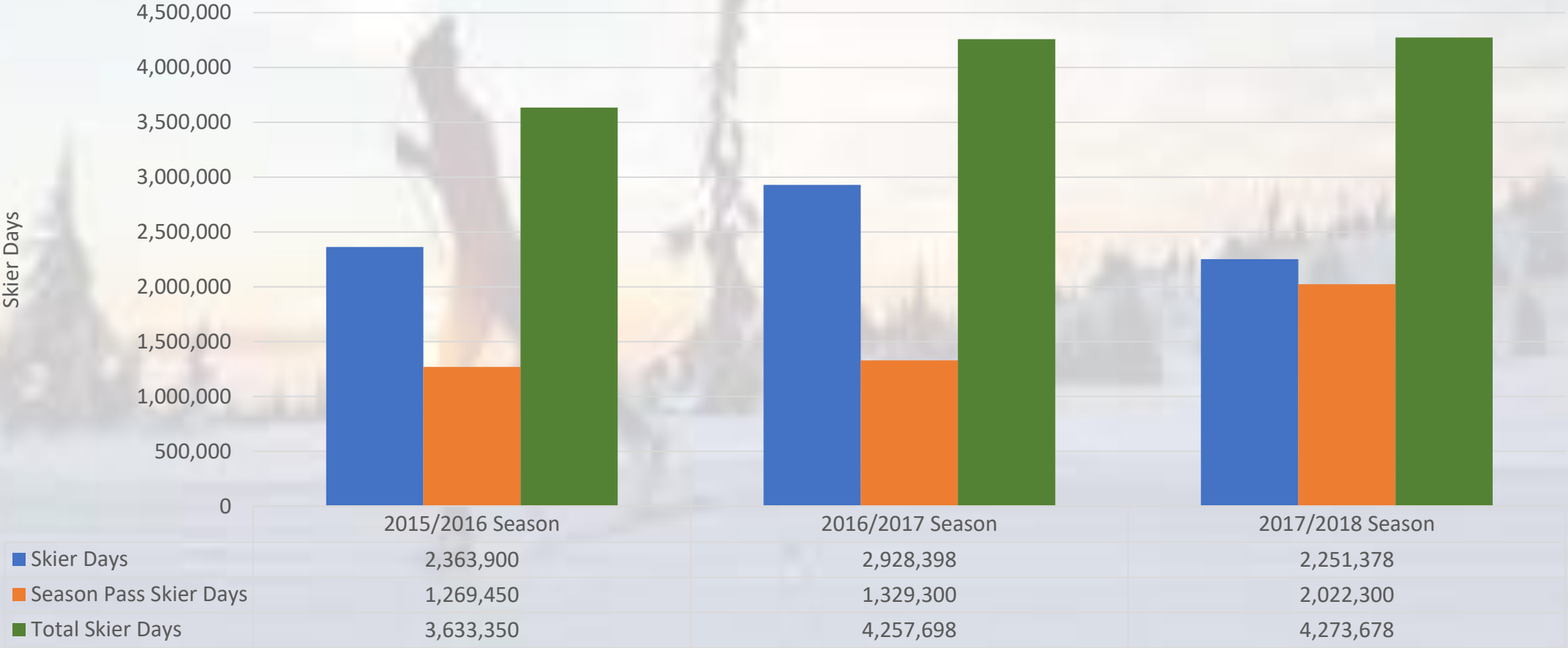
A person is seen from behind, cross-country skiing on a snowy trail. The sun is low on the horizon, creating a warm, golden glow. The background is filled with snow-covered evergreen trees under a clear sky.

# CCSAA Trail Visits Study

2019

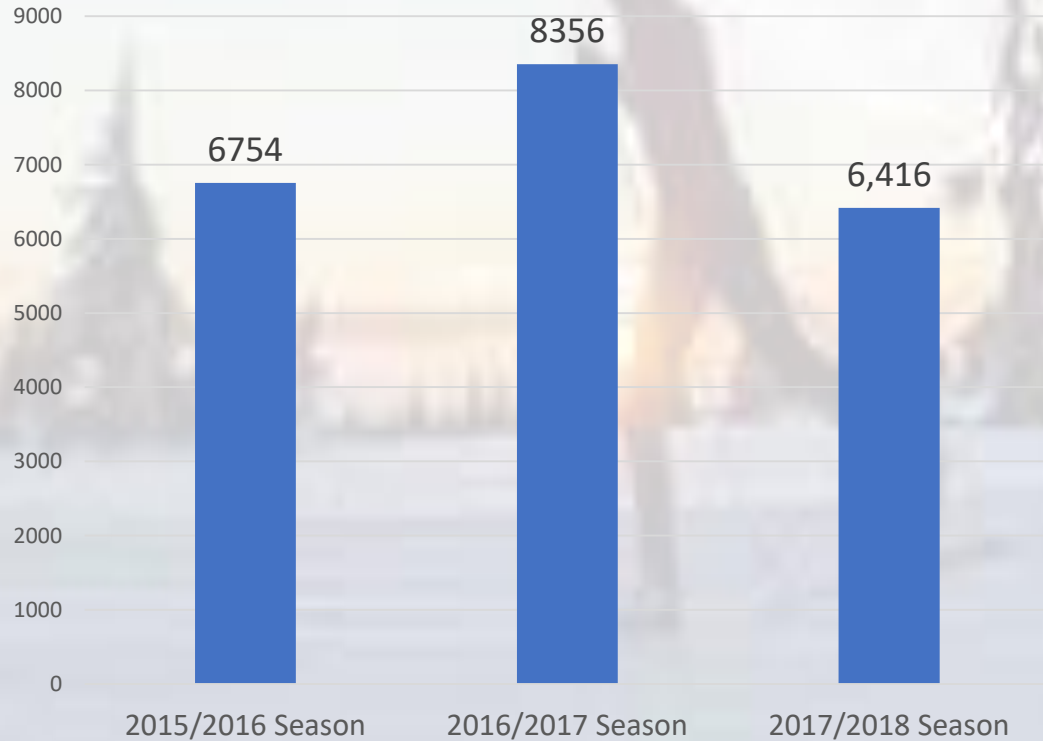


# Cross Country Skier Days

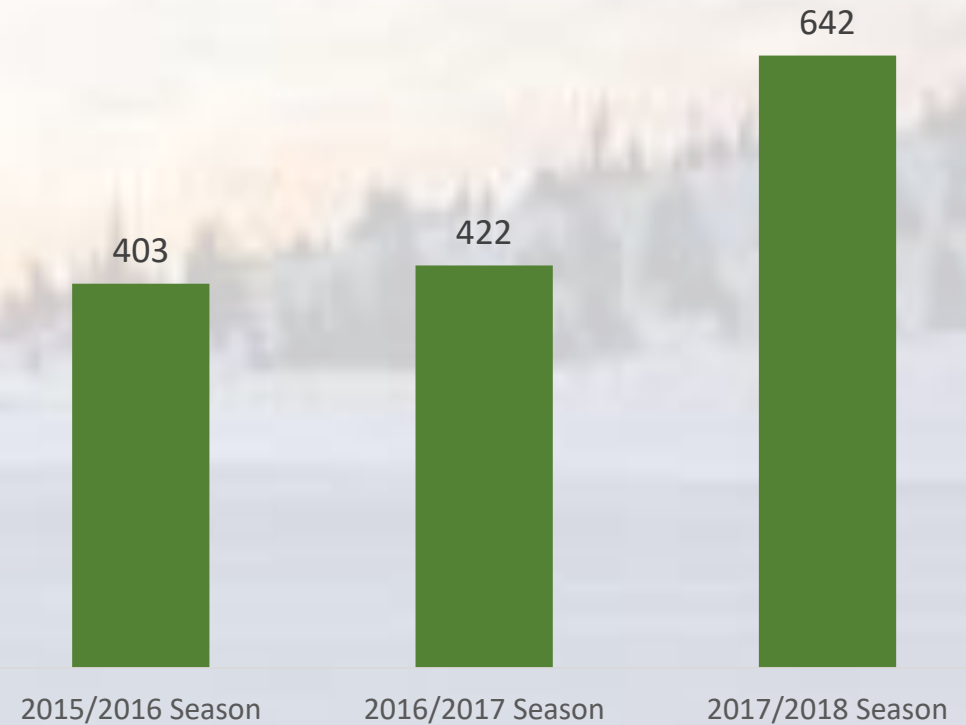


# Average Trail Passes and Season Passes Sold

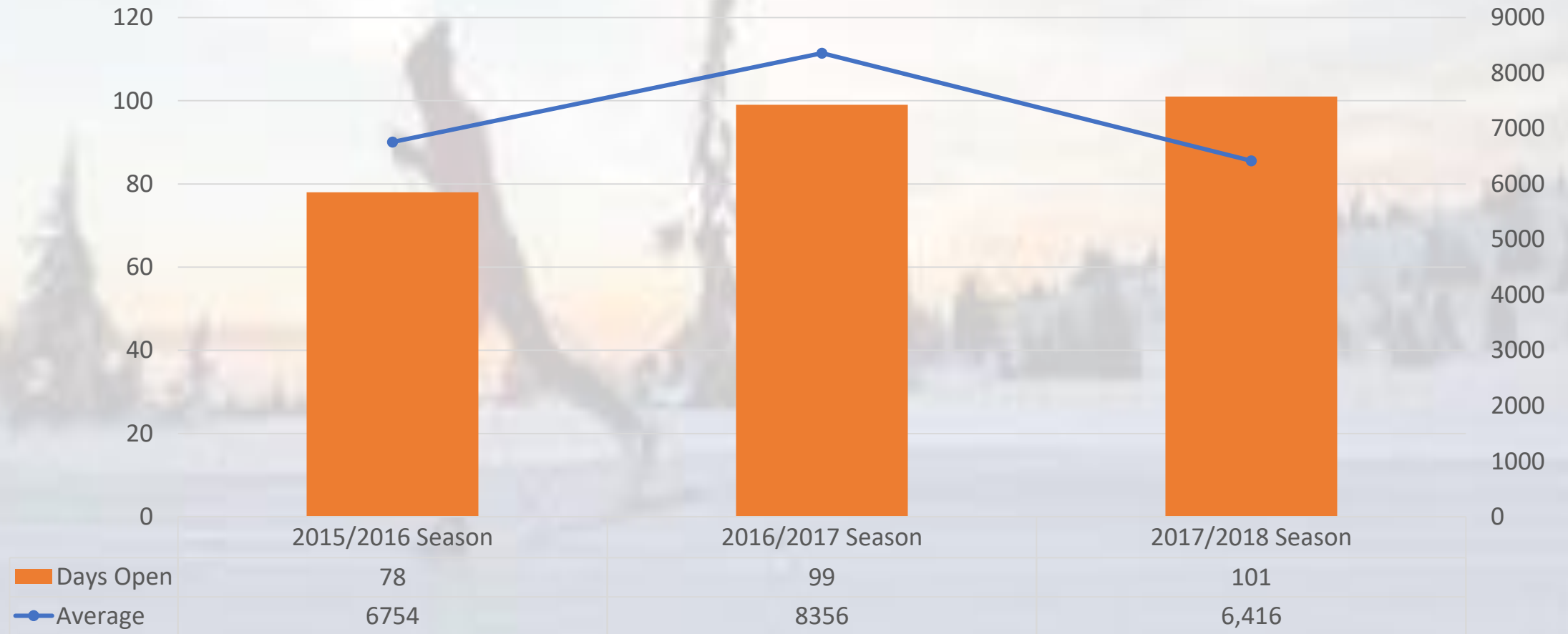
## Average Trail Passes Sold



## Average Season Passes Sold

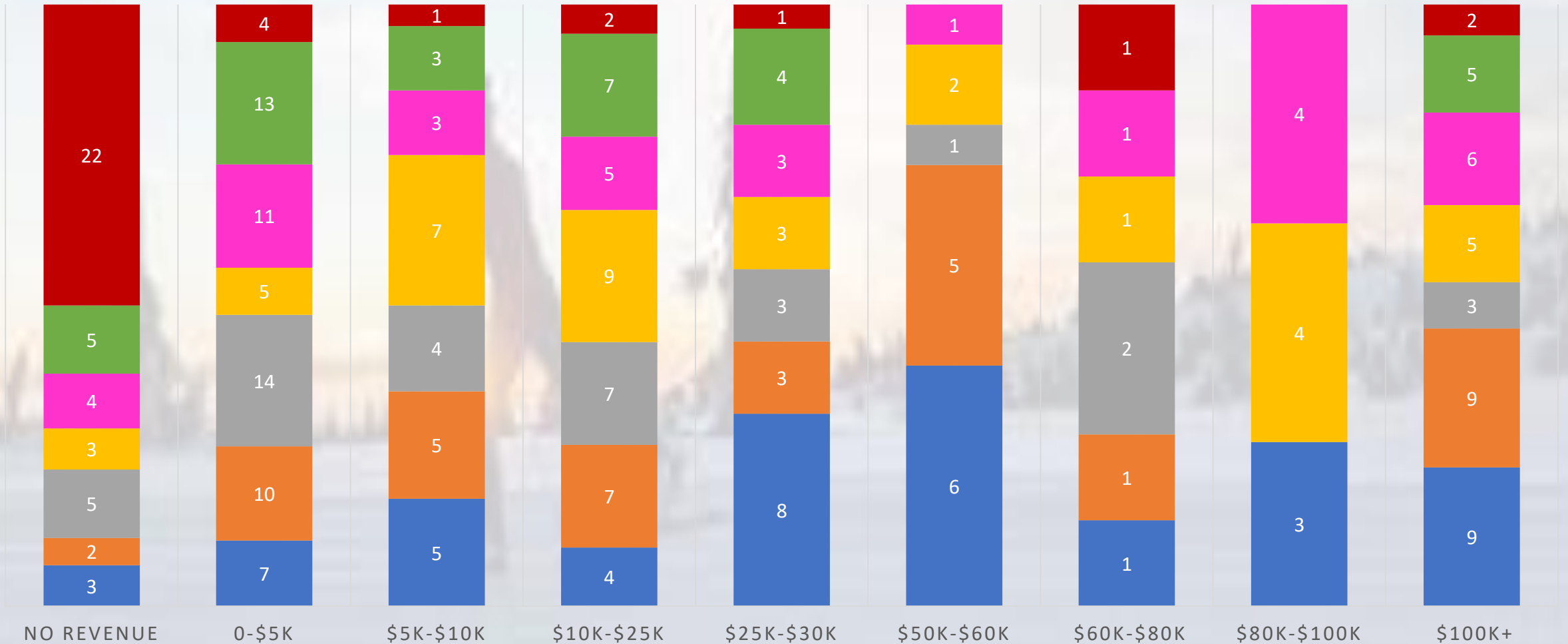


# Trail Passes Sold and Days Open



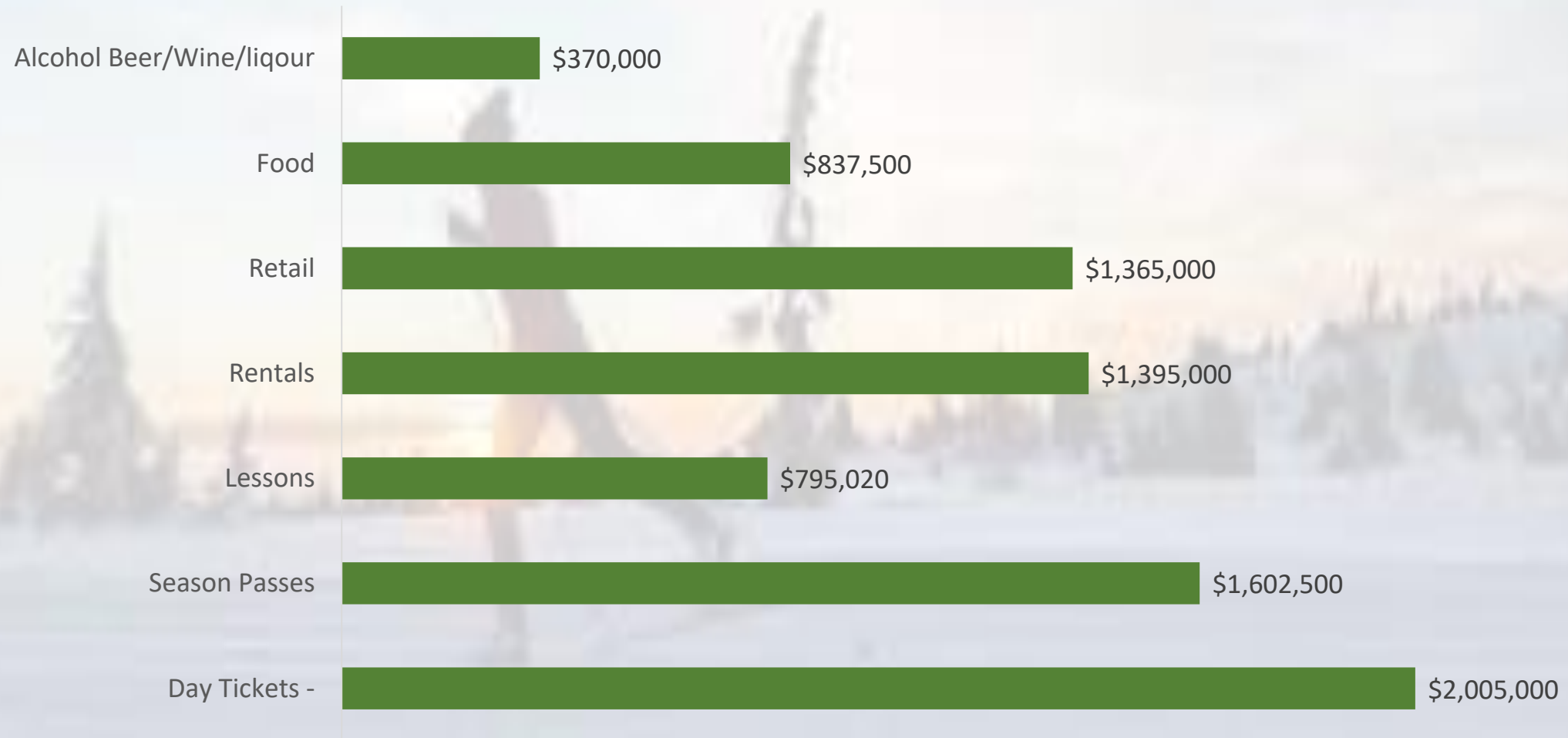
# Revenue

■ Day Tickets - 
 ■ Season Passes 
 ■ Lessons 
 ■ Rentals 
 ■ Retail 
 ■ Food 
 ■ Alcohol Beer/Wine/liquor

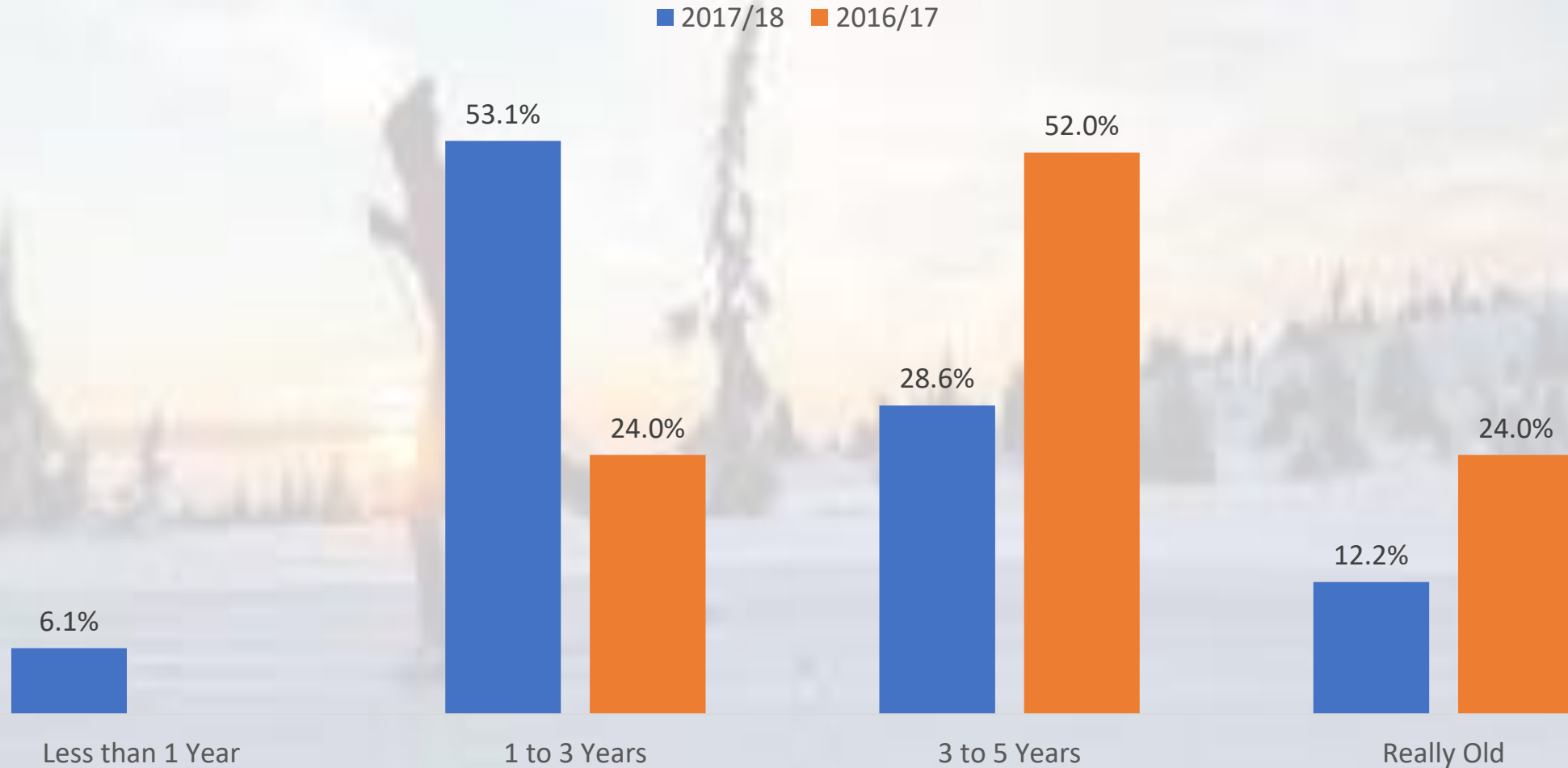


Note: The numbers in the chart above represent the number of ski areas that bring in the amount of revenue represented in the band, and the colors represent different revenue categories. Revenue ranged from \$0 to \$100,000 for the various categories of revenue including passes, lessons, rentals, retail, food, and alcoholic beverages.

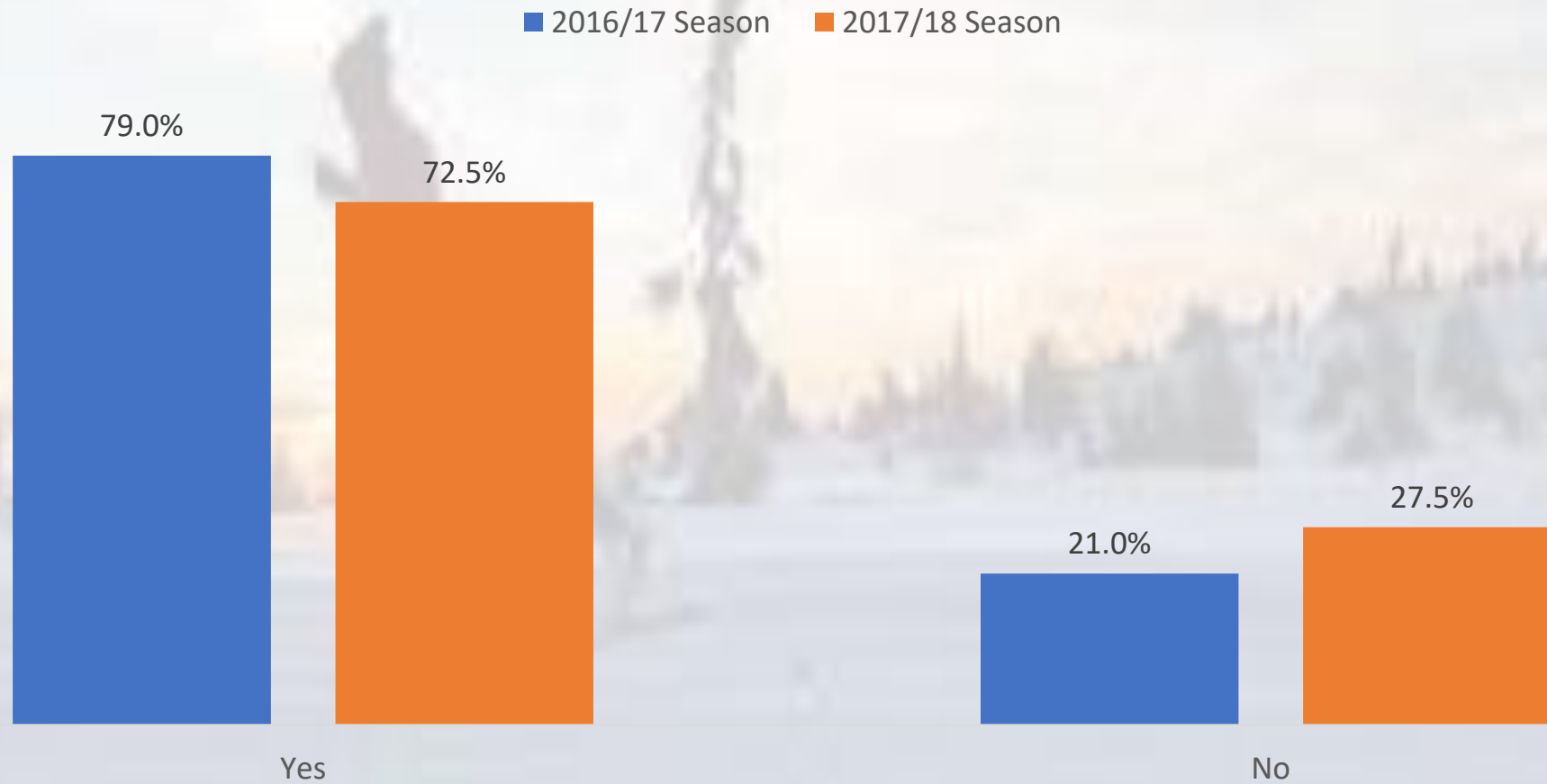
# Grand Totals by Revenue Category



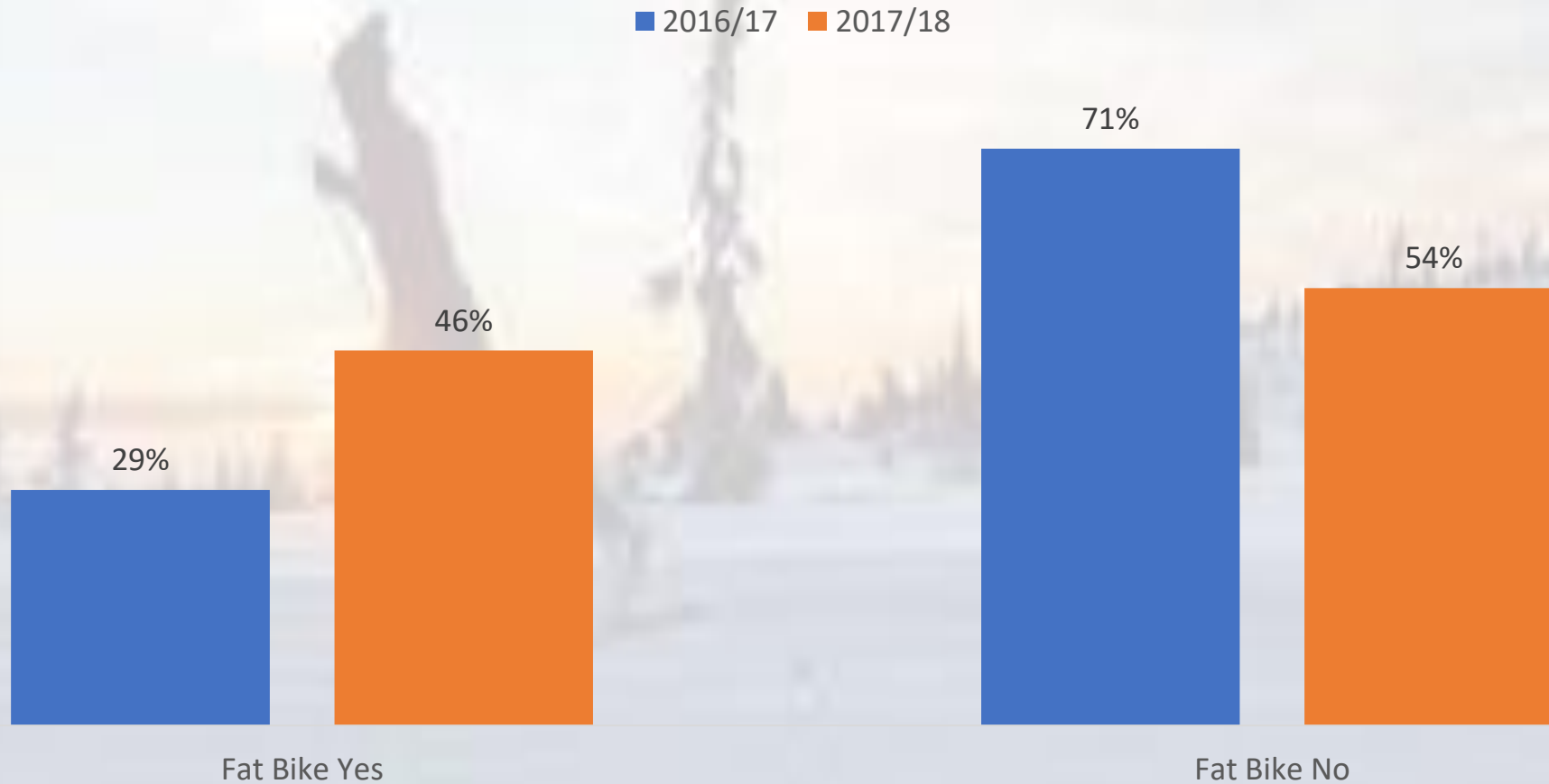
# How old is your ski and snowshoe rental fleet?



# Are you planning on replacing all or part of your rental fleet in the next 2 years?

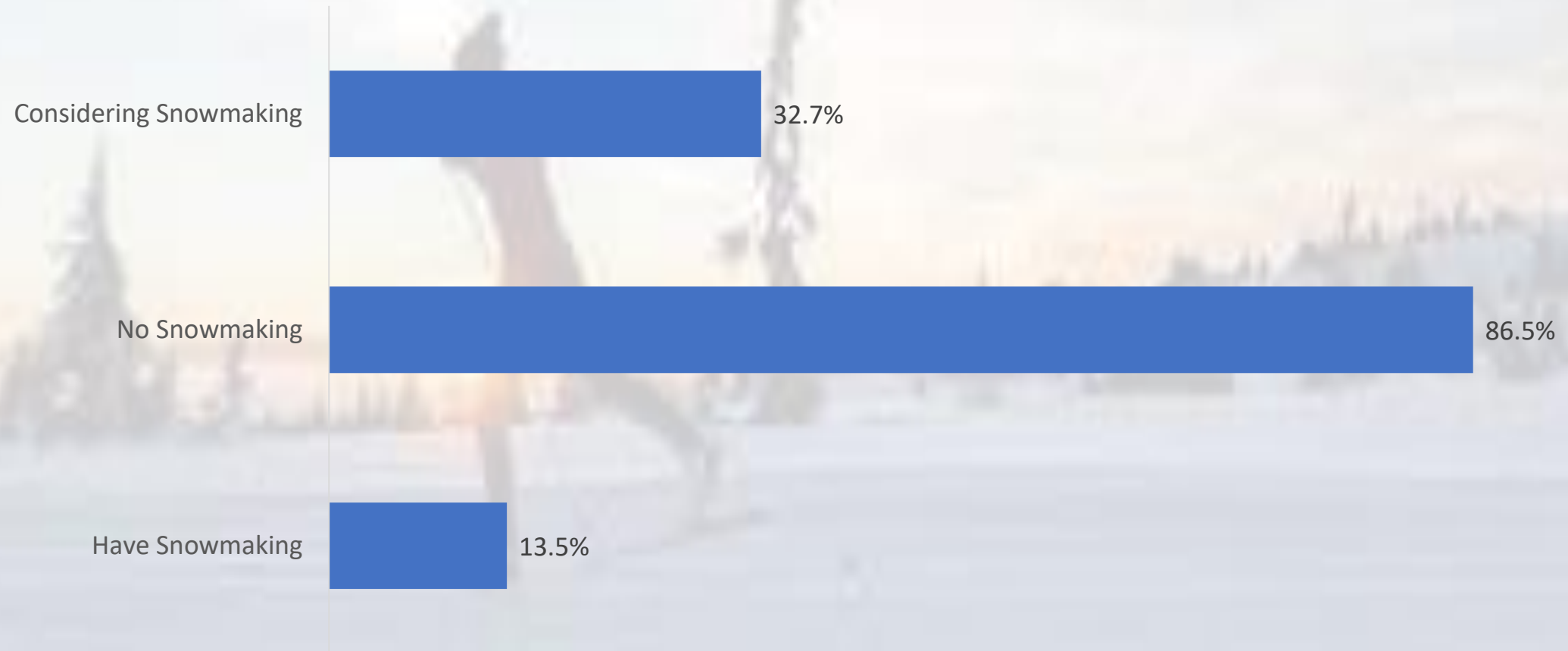


# Do you currently allow fat biking at your ski area?



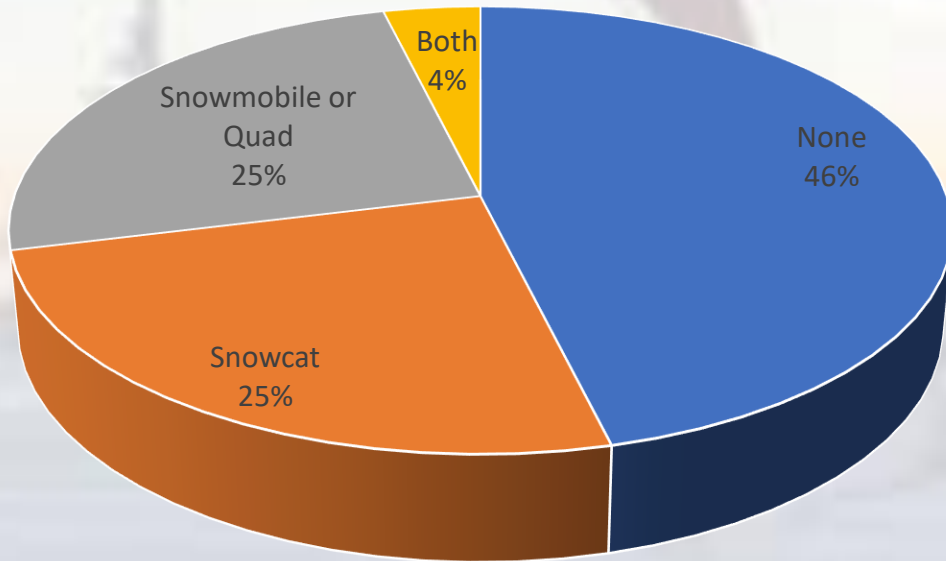


# Do you have, or are you considering a snowmaking system?

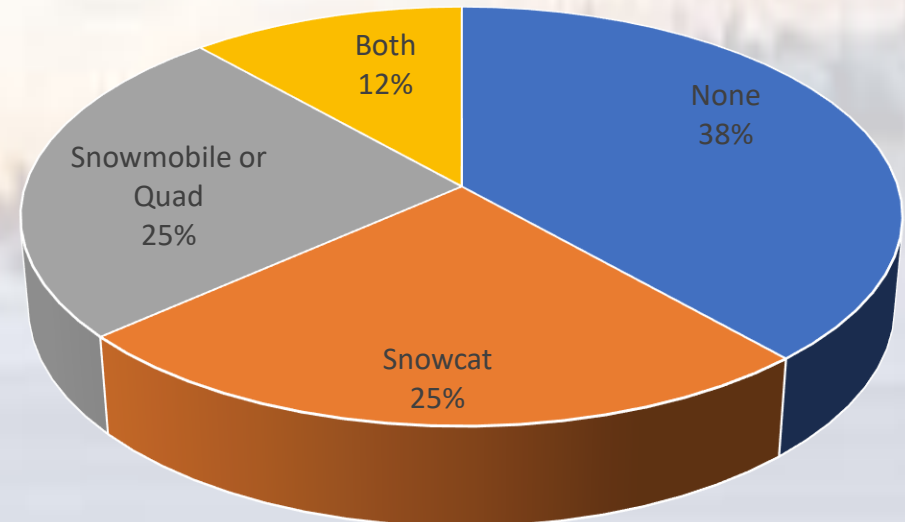


# Trail Groomers

Are you planning on purchasing a new or used groomer in the next two years?



If you purchased a new or used groomer in the last 2 years, what kind was it?



# What factors do you expect will have the greatest impact on your business, either positively or negatively, over the next 5 years?

- “Inconsistent snowfall/frequent thaws on the negative side. Growing awareness and participation from the local community on the positive side. Gradually increasing number of non-resident visitors to the area is expected.”
- “Growth of HS Nordic ski teams. We do not look at anything from a negative perspective. There is positive from everything, sometimes just have to work or look a little harder.”
- “Local Weather. Snowmaking will allow us to be open, but we need natural snow to be profitable.”
- “We are hoping to continue to serve our loyal cross-country skiers, but we anticipate a "group" of activities including fat bikes, guided back country skiing, guided cross country tours inside Glacier National Park, and even sledding. We have also opened the network of trails to dogs in order to open up the market.”

