Executive Summary

Winter outdoor activity participants are in the final stages of preparation for the 2020/2021 season, and they have significant concerns about the Covid-19 pandemic. Perceived levels of infection risk will drive people in unique ways this winter. In fact, perception of infection risk will be even more important than weather in determining participation and buying pattens in cross country skiing, snowshoeing, and every other outdoor winter activity.

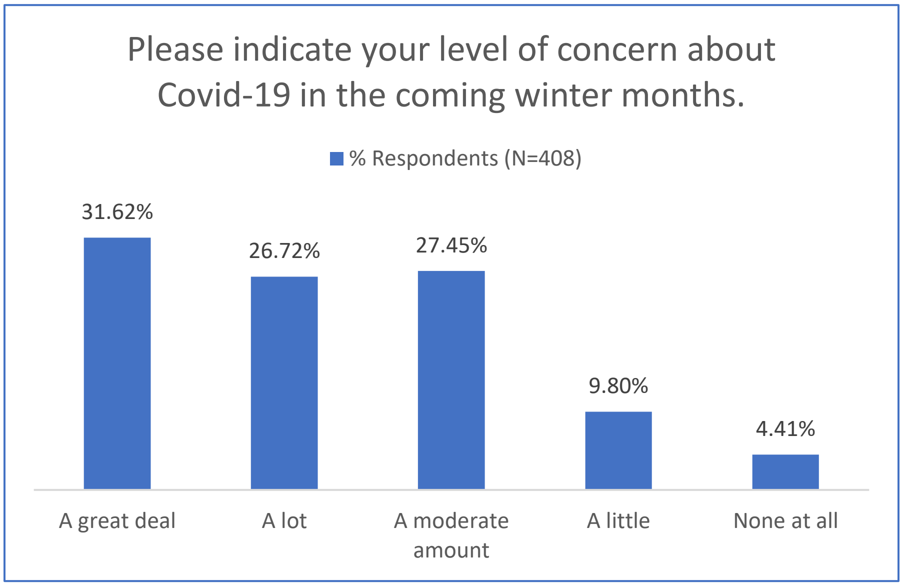
We surveyed a variety of likely participants with a bent toward cross country skiing and received more than 400 responses during the first two weeks of December. Additionally, we have built a panel of retailers who sell a wide variety of winter hard goods and soft goods who let us know which categories had increased sales through “Black Friday,” what trends they were seeing in their store including vastly expanded online sales, and which items were best sellers in hard goods and soft goods categories with emphasis on cross country gear.

The results of these surveys indicate that participants are most interested in local activities that allow them to control their risks but continue to get on snow. Casual downhill skiers are considering cross-country skiing and snowshoeing locally this season in addition to, or as a replacement for downhill skiing. Core downhill skiers are considering backcountry skiing on weekends when capacity limits at resorts are met and the highest levels of risk from Covid-19 infection are present – like on Saturdays. Overall, participants are looking to participate locally in ways that manage their risk of contracting the Covid-19 virus.

Cross country skiers are buying new gear this season; although 94% already own equipment, more than half were planning to buy additional equipment for this season. Respondents also plan to buy snowshoes (16%), sleds and saucers (15%), ice skates (10%), and alpine touring hard goods (10%). Just 8% of alpine skiers surveyed plan to buy any new equipment this season. Retailers indicate that sales of cross-country and alpine touring (backcountry skiing) gear were up more than 20% through November.

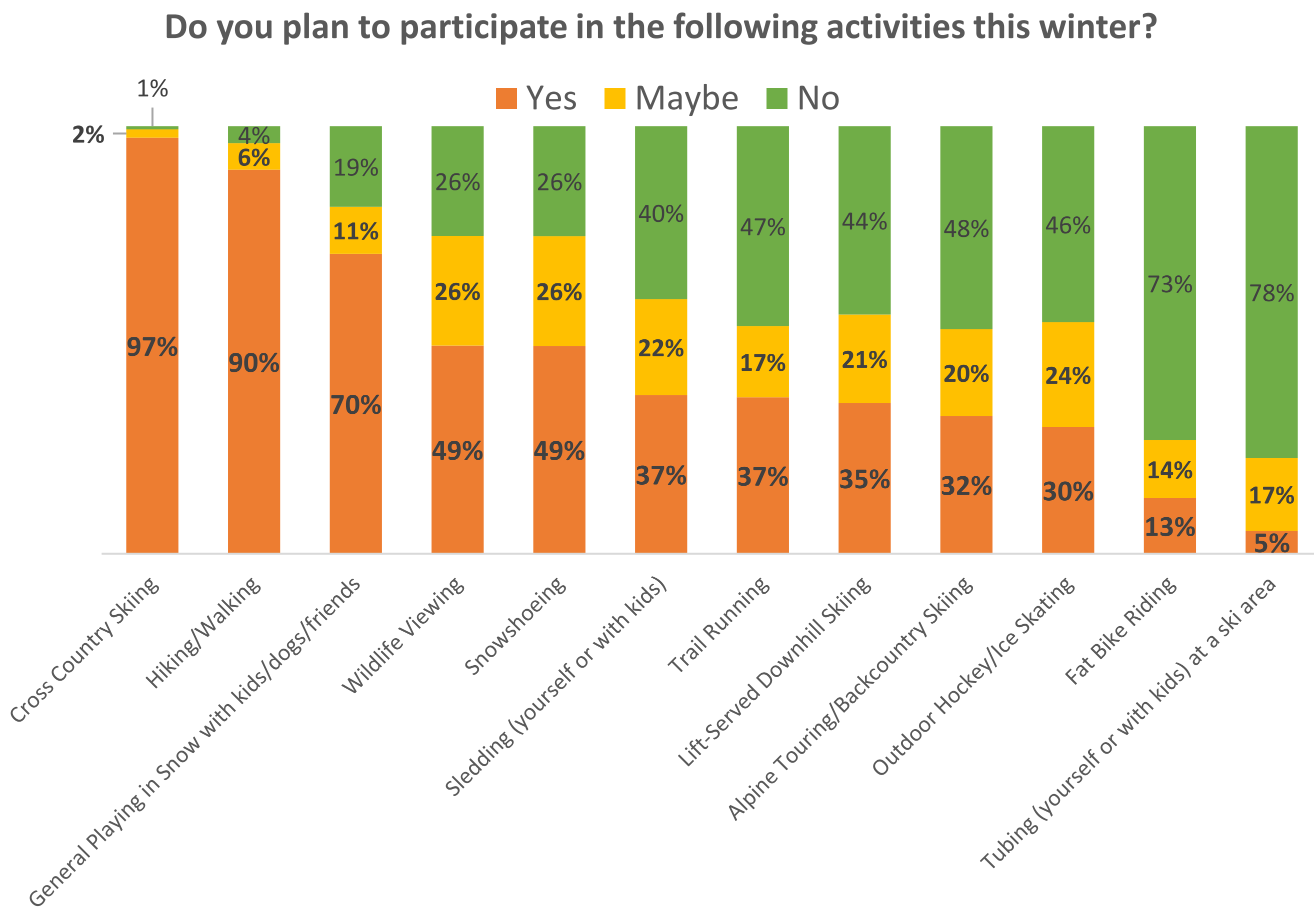
The Elephant in the Room – Covid-19 Pandemic

For the first time in North America, the most important variable to watch is ***not weather***. The Covid-19 pandemic is a very significant worry for participants this season and is likely to affect their choices in winter activities and purchases this season. In fact, for nearly 60% of participants, their concern about the pandemic is high. Just under 15% have low levels or no concern about the pandemic, Interestingly, as of the close of this survey on Dec 21st, Epidemiologists with the United States CDC show definitively that 6% of the U.S. population has tested positive since January 2020, and estimate that up to 28% of Americans have been infected by the Covid-19 virus since January. They estimate that 15% of persons infected were asymptomatic – capable of spreading the infection but not aware of their risk to others. The risk of infection is highest for winter outdoor participants in places and situations common to lift-served downhill ski areas including lack of social distancing on lifts and gondolas, indoor rental centers, and food service areas. People who typically participate in winter outdoor activities are leaning toward safer options like cross-country skiing, snowshoeing, winter hiking, general playing in the snow, and backcountry skiing/touring. Just 35% of respondents said they were planning on participating in downhill skiing and another 21% were waiting to see how the season was going.

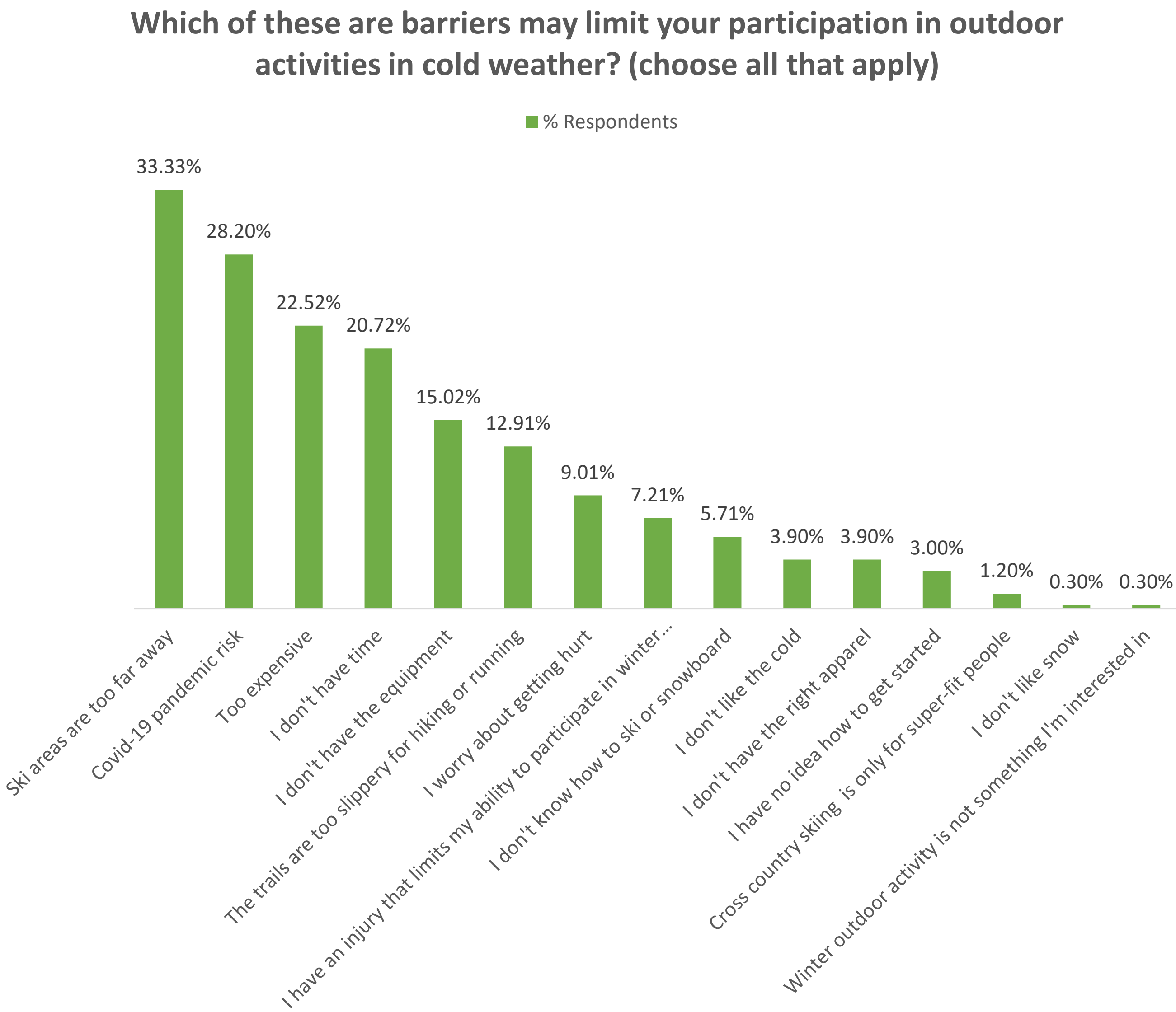


Participation Patterns Look Different This Season

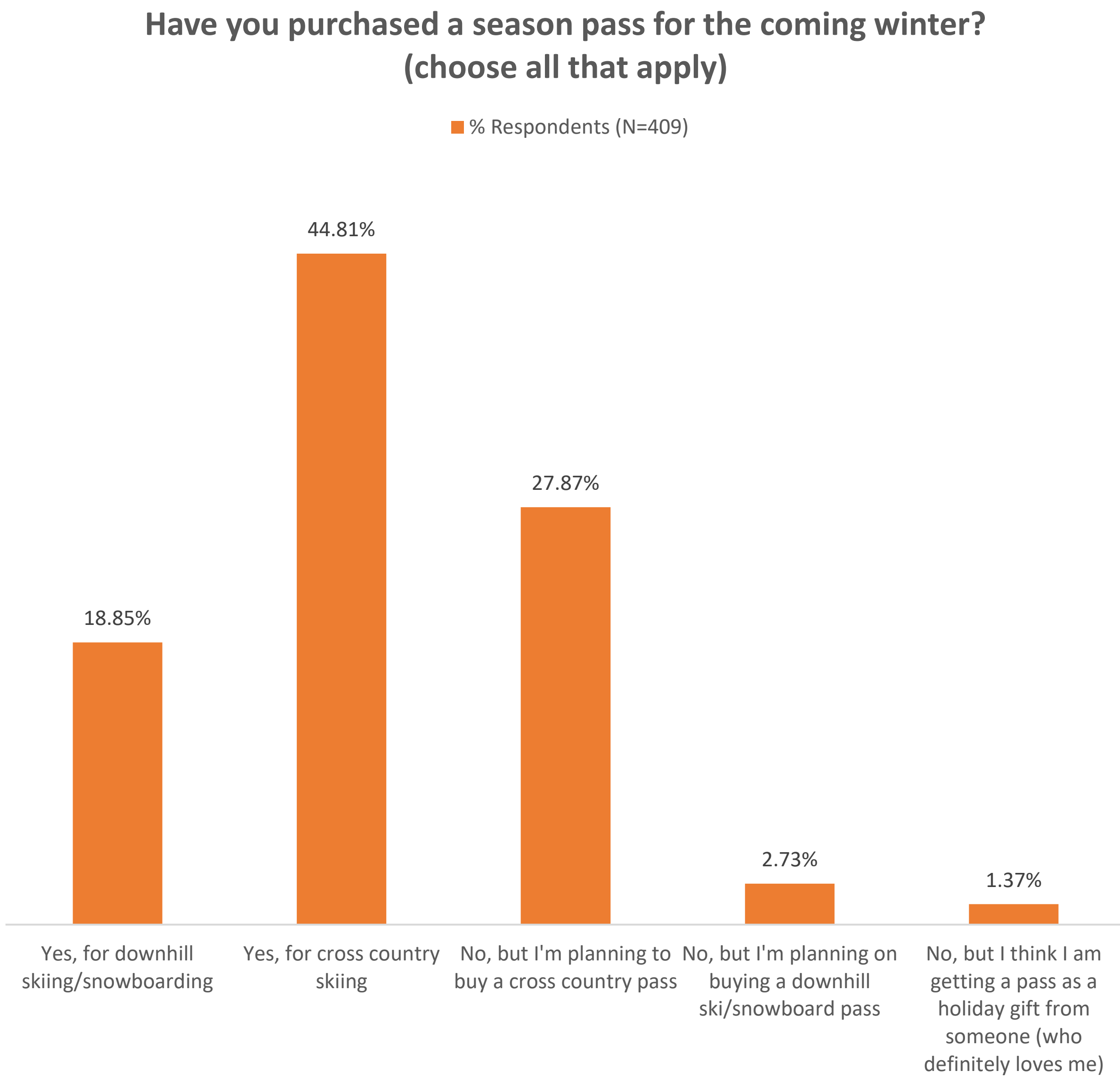
Skiers are likely to stay close to home this season. For the 2020/2021 season, concerns about the pandemic are second only to proximity to ski areas/resorts as a barrier to participation. In past surveys conducted by SIA, lack of time and expense were the top two barriers to participation (including the annual SIA-PAC Snow Sports Participation Report and special research conducted in 2017 to provide in-depth data about barriers to participation (SIA Downhill Consumer Intelligence Project [DCIP]).



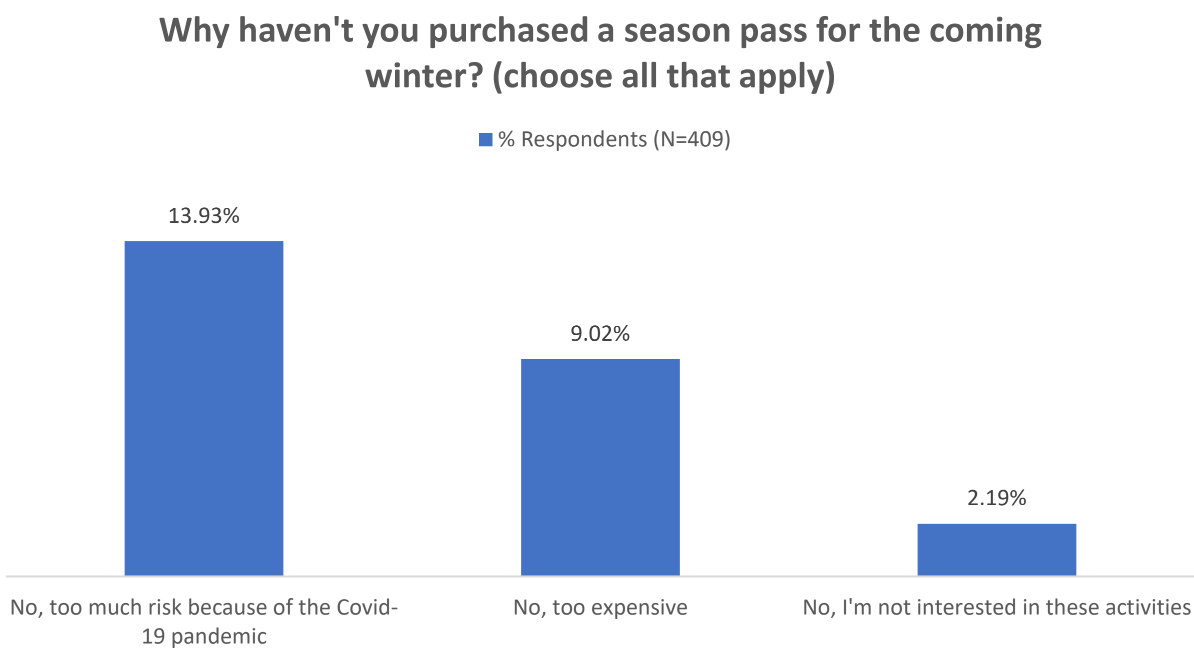
Although in this survey we did not specifically ask questions about intentions to travel to ski, it is likely that responses about the proximity of resorts as a barrier show a lack of will to travel long distances, particularly by air for winter outdoor activities including cross country, snowshoe and downhill skiing. This season, locals will likely make up the bulk of participants, even at popular destination resorts. Keep in mind there is evidence that some core participants who typically spend a week or more at their favorite destination ski area will be more likely to frequent their local areas regardless of size.



Core participants, those who are likely to participate 9 times or more (SIA definition) typically purchase season passes for downhill and/or cross-country skiing. Over the past decade, multi-resort passes that offer local and destination options including Epic, Ikon, Mountain Collective, and others have been standard for many skiers and riders. Particularly over the past five years as Vail and Alterra (Epic and Ikon respectively) have acquired more resorts and smaller resorts, skiers and riders have been willing to pay more for their season passes that offer them access to their local resorts and options at iconic destination resorts like Breckenridge, Jackson Hole, and European options like Ski Arlberg. This season, Vail reported a 20% increase in sales of their Epic pass to 1.4M passes. The reasons for the increase include adding 17 (formerly Peak) resorts and incentivizing pass buying with priority access to reservations required due to pandemic-related capacity limits among other incentives.

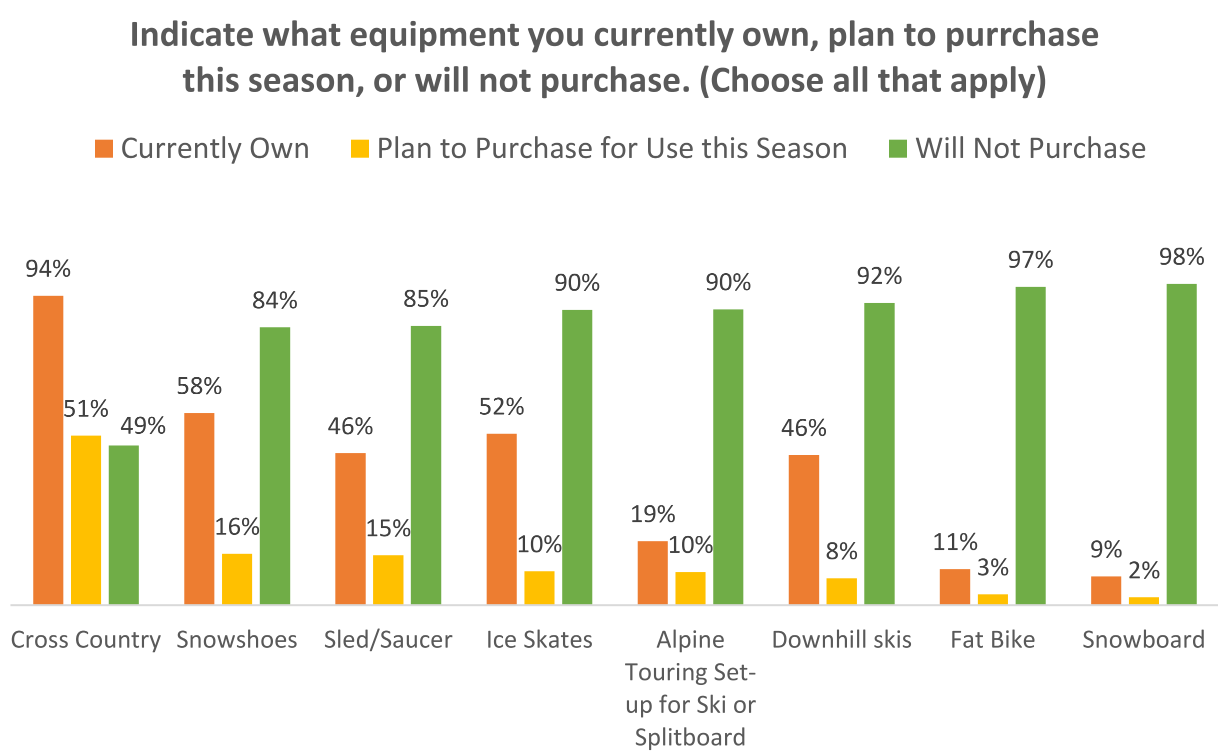


Casual participants, those who typically ski/ride 2 to 8 times a season and make up the majority of all downhill participants are less likely to participate in downhill skiing this season. In addition to the risk of infection, non-passholders must pre-arrange visits by first purchasing a day or multi-day pass online and vying for reservations with season passholders who have priority to visit the resort due to mandated capacity limits. The hassle factor for casual skiers and snowboarders has never been higher and the expense of day tickets are also at record highs. The average price of a weekend, adult all mountain pass is more than $100 and is higher than $200 for 8 hours of lift access at some resorts.


Why haven't you purchased a season pass for the coming winter? (choose all that apply)
% Respondents (N=409)
13.93%
9.02%
2.19%
No, too much risk because of the Covid-19 pandemic
No, too expensive
No, I'm not interested in these activities

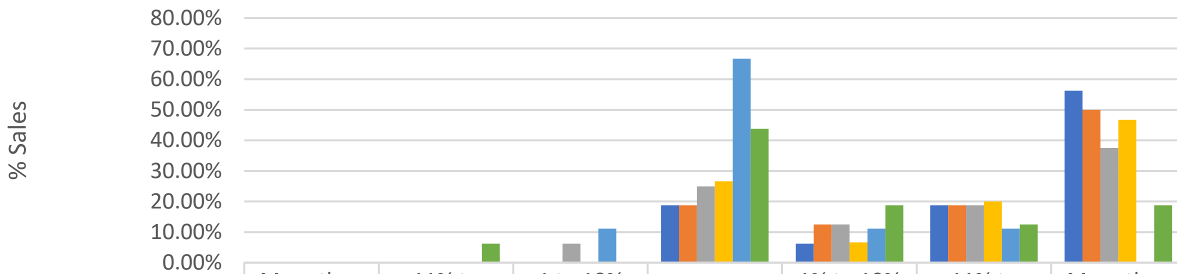
Winter Equipment Buying Behavior

The trends that affect participation also affect buying behavior. This season, participants are most likely to purchase hard goods related to the snow sports they participate in locally that offer environments where participants perceive their risk of infection is manageable. Comments provided by respondents helped shed light on some of the ways participants plan to manage their risk including booting up in parking lots and forgoing resort dining and drinking, avoiding indoor bathrooms, socially distancing with the assistance of ski poles, and picking times to ski when an area is least likely to be crowded. This may be a season of small innovations developed to help participants manage some of their strategies to participate during a pandemic – we shall see. What is clear is that purchases are heaviest for equipment and soft goods that will maximize the positive experiences of activities participants are comfortable pursuing in the pandemic. See the chart below that shows that more than half of cross- country skiers plan to purchase equipment even though 94% of respondents own cross-country ski equipment currently. By comparison, 48% of the respondents indicated that they own downhill ski equipment but just 8% plan to purchase new downhill ski equipment this season.



Snow play including sledding and saucering, general playing in snow with kids, dogs, and friends were popular responses. This small piece of information is key to soft goods sales. Consumers will be purchasing apparel and accessories that are appropriate for general winter outdoor activities. Expect to see items that can be worn across activities like skiing, sledding with the kids, winter hiking and walking.

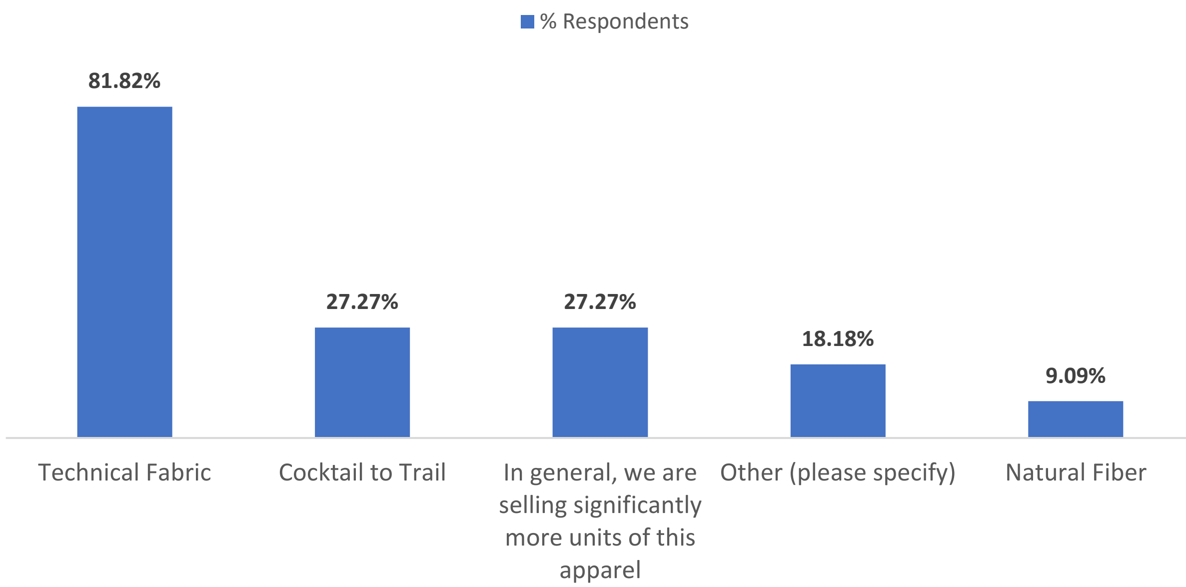
How are your cross country equipment, snowshoes, fat bike, and apparel sales through November this season? (hard goods in units and apparel in dollars sold)



	More than 20% down	11% to 20% down	1 to 10% down	Even	1% to 10% up	11% to 20% up	More than 20% up
Skis (%Units)	0.00%	0.00%	0.00%	18.75%	6.25%	18.75%	56.25%
Boots (%Units)	0.00%	0.00%	0.00%	18.75%	12.50%	18.75%	50.00%
Bindings (%Units)	0.00%	0.00%	6.25%	25.00%	12.50%	18.75%	37.50%
Snowshoes (%Units)	0.00%	0.00%	0.00%	26.67%	6.67%	20.00%	46.67%
Fat Bikes (%Units)	0.00%	0.00%	11.11%	66.67%	11.11%	11.11%	0.00%
Apparel	0.00%	6.25%	0.00%	43.75%	18.75%	12.50%	18.75%

Retailers report apparel sales trends that confirm consumer preferences for cross activity wear including the "cocktail-to-trail" trend in cross-country apparel. In addition, technical fabric that keeps active consumers dry and warm is trending heavily so far this season.

What apparel trends have you noticed in sales to customers who are most likely to participate in cross country skiing, snowshoeing, and/or fat biking? (choose all that apply)



Consumers reporting their buying patterns and retailers reporting their sales agree so far this season. Retailers are reporting increased sales through November in most categories. Most are reporting sales of cross-country skis, boots, bindings, and snowshoes up more than 20%. Some have indicated sales in some of these categories are up more than 100% through November.

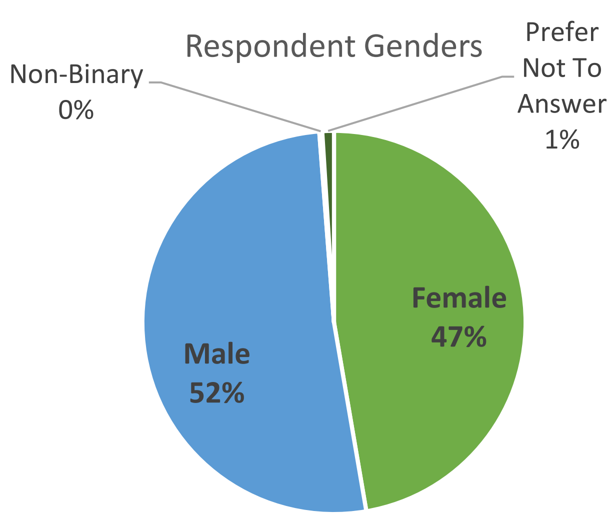
Methodology

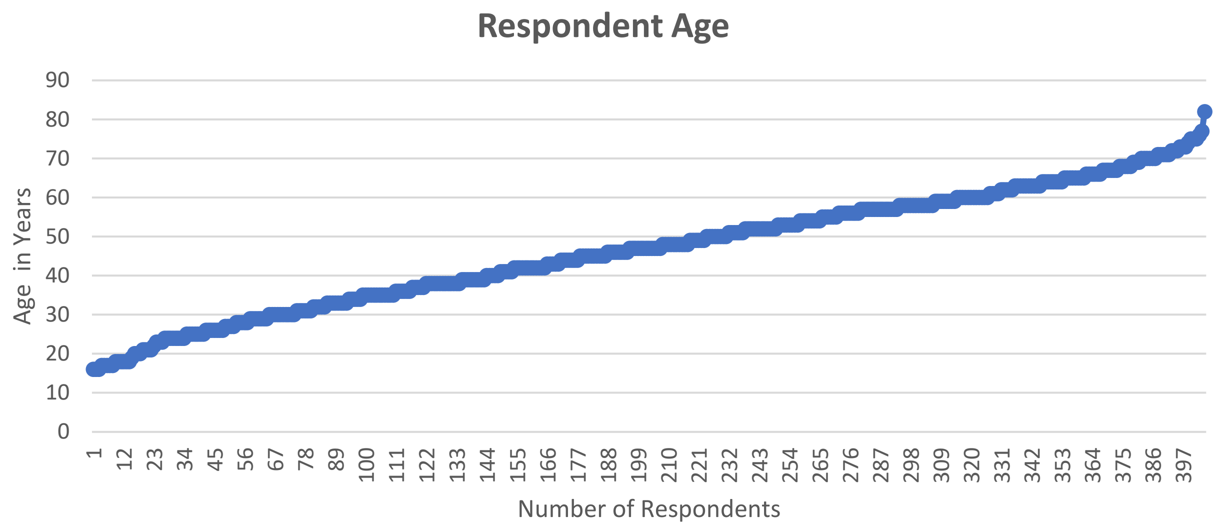
During the first two weeks of December, Snow Sports Insights LLC surveyed a variety of likely participants with a bent toward cross country skiers. We received a total of 421 responses from consumers interested in outdoor winter activities. Considering the participation base for snow sports (14M), that gives us a margin of error of +/-4.8% at a 95% confidence interval. That means that if we conducted the same survey 100 times, 95 would be returned with responses within 4.8% of those collected in this survey.

Additionally, we have built a panel of retailers who sell cross-country hard goods and a wide variety of winter hard goods and soft goods. Those retailers responded to questions about which categories had increased sales through "Black Friday," what trends they were seeing in their store including vastly expanded online sales, and which items were best sellers in hard goods and soft goods categories with emphasis on cross country gear.

Respondent Demographics

Survey respondents' demographics were typical of snow sports surveys. Slightly more males responded than females and the average age of respondents was 46. The age distribution was smooth with no age group dominating the response. This means we are reporting on an excellent mix of participants of different ages, and good representation of males and females.





Conclusions

Covid-19 will play a unique role in snow sports participation this winter driving snow sports participants to stay local and motivating many new participants to try activities that offer more safety in a pandemic including cross country skiing and snowshoeing. Marketing messages should include positives like ability to socially distance, availability of activities closer to home, and general language about health and accessibility of the activity. Consumers are buying hard goods and soft goods for those activities in which consumers believe the risk of the pandemic can be managed. Additionally, they will look for apparel and accessories that can be used across activities like cross-country skiing, trail running, and general winter play.

Consumers' efforts to manage safety could drive a short season of innovation for products that allow better management of Covid-19 risks inherent in each activity. Think about solving issues for consumers who plan to "gear-up" carside rather than inside, who plan to forgo indoor dining and drinking, and plan to participate locally but not as destination visitors. Cross country ski areas and suppliers should consider emphasizing the relatively low risk of contracting Covid-19 while participating on trail. They should focus on attracting and retaining new casual participants who are looking for good alternatives to typical destination resort skiing. This season will include significant increased participation in cross-country skiing, snowshoeing, and alpine touring where the risks of contracting Covid-19 are lowest.

For more information, please contact:

Reese Brown – Cross Country Ski Areas Association – 802-236-3021
Kelly Davis – Snow Sports Insights – (301) 785-2490