

PARTICIPATION STUDY 2019-2020





INTRODUCTION

The SIA Participation Study 2019-2020 is a comprehensive look at participants in winter sports across the 2019-2020 season including: skiing, snowboarding, cross-country skiing, snowshoeing, sledding, and touring. The study highlights a general cumulative view of winter sport participation and demographics, in addition to further in-depth analyses of each winter sport activity. It covers participant demographics, frequency, regional representation, crossover activities, and more.

The SIA Participation Study 2019-2020 is produced in collaboration with the Physical Activity Council (PAC), a partnership of eight major trade associations in US sports, fitness, and leisure activities.

Surveys were carried out with a nationwide sample of individuals and households during 2019 and the beginning of 2020. The total panel is representative of the US population for people ages six and older. A full description of the research methodology is found at the end of this study.

For further information on winter sport participation or to request access to the raw data, please contact research@snowsports.org

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THE TAKEAWAYS

WINTER SPORTS¹

Winter sport participation increased **1.9%** in the 2019-2020 winter season to **25.1 Million** Americans ages 6 and older.

The Pacific Region had the largest number of winter sport participants at 4.53M. The South Atlantic Region was a close second at 4.38M.

Participation across winter sports by ethnicity has remained flat for **Asians** (7.7%) and **Whites** (67.5%), decreased by 0.5% for **Blacks** (9.2%) and increased by 0.4% for **Hispanics** (14%).

SKIING²

In 2019-2020, the Pacific Region (CA, OR, WA) had the largest share of skiers that went 7 or more times in that season (22.1%).

Vermont, New Hampshire, Idaho, Maine and Colorado had the highest precentage of skiers per capita by state.

The largest segment of skiers (19%) that went 7 times or more for the 2019-2020 season were between 45 and 54 years old.

Last season, the leading segment was 25 to 35 year olds (23%).

SNOWBOARDING

The **largest** segment of snowboarders (23%) that went **7 times or more** were between **25 and 34 years old.**

The next largest segments are 6 to 12 year olds (20%) and 13 to 17 year olds (19%).

The Pacific Region had the largest share of snowboarders that went 7 or more times (27%).

CROSS-COUNTRY SKIING

More cross-country skiers went to a private cross-country center (62%) as compared to a public cross-country center with trails groomed by a government entity (45%).

ALPINE TOURING and SNOWBOARD TOURING

There were **705K** alpine touring participants and **652K** snowboard touring participants in the backcountry aged 18 and above.

SNOWSHOEING

Snowshoers tend to also participate in snowboarding (47%), cross-country skiing (42%) and hiking (38%).



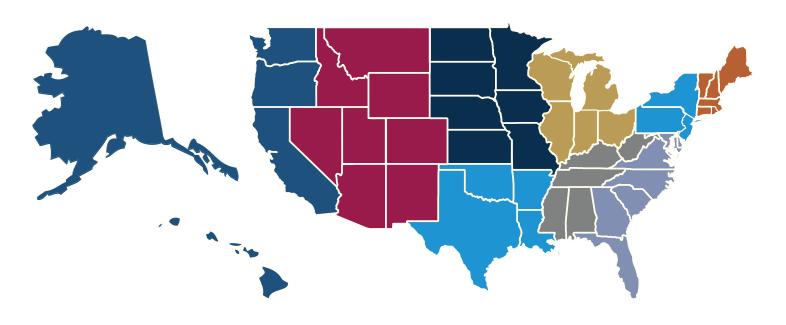
Winter Sports Participation and Demographics



TOTAL PARTICIPANTS: 25.1M

WINTER SPORTS¹ PARTICIPATION BY REGION

These numbers and percentages are based on 25.1M total winter sport participants



PACIFIC 4.5M MOUNTAIN 2.3M WEST SOUTH CENTRAL 2M WEST NORTH CENTRAL 1.6M
EAST NORTH CENTRAL 3.9M
EAST SOUTH CENTRAL 1.1M

NEW ENGLAND 1.6M MIDDLE ATLANTIC 3.7M SOUTH ATLANTIC 4.4M

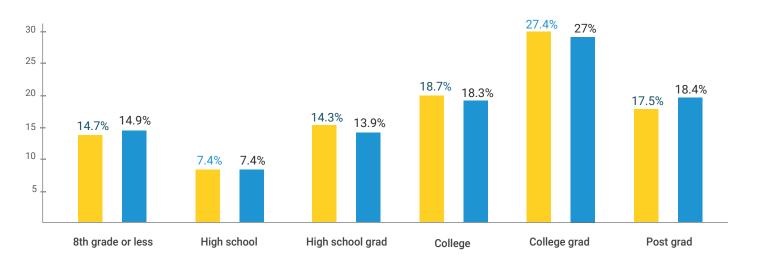


25.1 Million Americans ages 6 and older participated in winter sports in the **2019-2020** winter season. This is up 1.9% from 24.6 Million recorded in the 2018-2019 winter season.

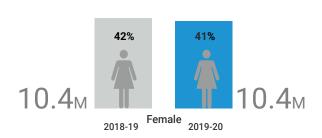


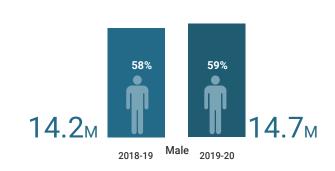
PARTICIPANTS BY EDUCATION





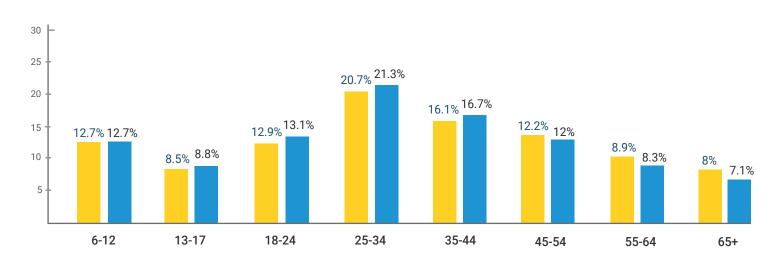
PARTICIPANTS BY GENDER





PARTICIPANTS BY AGE

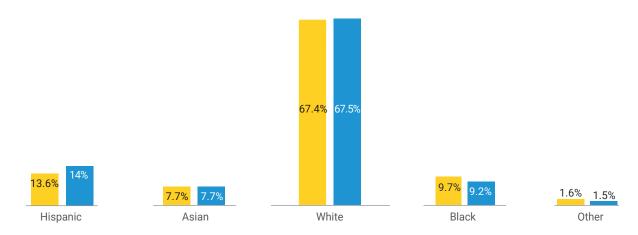






2018-2019 2019-20

PARTICIPANTS BY ETHNICITY



PARTICIPANTS BY INCOME





PARTICIPATION OVER TIME

	SI	KI	SNOW	BOARD		COUNTRY	SNOW	/SHOE
		Growth %		Growth %		Growth %		Growth %
2011/2012	13.8M	8%	7.6M	-8%	4.3M	-5%	4.1M	8%
2012/2013	14.5M	5%	7.4M	-3%	4.5M¹	5%	4.0M	-2%
2013/2014	14.9M	2%	7.4M	1%	4.3M	-5%	3.6M	-11%
2014/2015	15.3M	3%	7.7M	4%	4.1M	-3%	3.9M	8%
2015/2016	15.6M	2%	7.6M	-1%	4.6M	12%	3.5M	-9%
2016/2017	15.3M	-2%	7.6M	-1%	5.1M	9%	3.7M	5%
2017/2018	14.7M	-4%	7.1M	-7%	5.1M	0%	3.5M	-5%
2018/2019	14.9M	1.1%	7.8M	9.4%	4.9M	-4.4%	3.4M	-3.1%
2019/2020	14.3M	-3.6%	7.9M	1.1%	4.8M	-2.2%	3.4M	-1 %
% of US Pop. 6 and older	4.7	7%	2.6	5%	1.6	5%	1	.1%

AVERAGE NUMBER OF DAYS BY AGE & ACTIVITY

			Total Avg	6-12	13-17	18-24	25-34	35-44	45-54	55+
	Sec.	SKI	7.4	8.5	7.5	8.9	8.4	7.1	9.9	9.6
	3	SNOWBOARD	7.8	7.6	9.5	6.5	4.6	6.3	5.5	4.9
2019 -2020	S	CROSS-COUNTRY SKIING	7.5	7.9	13.1	9.9	6.0	5.0	10.0	7.4
2019		SNOWSHOE	6.6	8.0	9.2	7.6	5.6	6.9	9.5	7.9
	j.	ALPINE TOURING	5.8	6.6	5.5	5.9	6.5	4.3	4.9	6.6
	4	SNOWBOARD TOURING	4.7	5.4	2.6	3.4	6.8	5.9	4.9	2.6
			Total Avg	6-12	13-17	18-24	25-34	35-44	45-54	55+
	No.	SKI	Total Avg	6-12 8.6	13-17 7.4	18-24 8.8	25-34 8.8	35-44 7.1	45-54 10.1	55+ 9.7
	%	SKI SNOWBOARD	-							
-2019			7.4	8.6	7.4	8.8	8.8	7.1	10.1	9.7
2018-2019	3	SNOWBOARD	7.4 7.8	8.6 7.3	7.4	8.8	8.8 4.5	7.1 6.4	10.1 5.4	9.7 4.8
2018 -2019	S	SNOWBOARD CROSS-COUNTRY SKIING	7.4 7.8 7.7	8.6 7.3 7.7	7.4 9.4 13.5	8.8 6.5 10.1	8.8 4.5 5.9	7.1 6.4 4.7	10.1 5.4 10.3	9.7 4.8 7.2
2018 - 2019		SNOWBOARD CROSS-COUNTRY SKIING SNOWSHOE	7.4 7.8 7.7 6.7	8.6 7.3 7.7 7.8	7.4 9.4 13.5 9.3	8.8 6.5 10.1 7.3	8.8 4.5 5.9 5.6	7.1 6.4 4.7 6.4	10.1 5.4 10.3 9.5	9.7 4.8 7.2 7.9

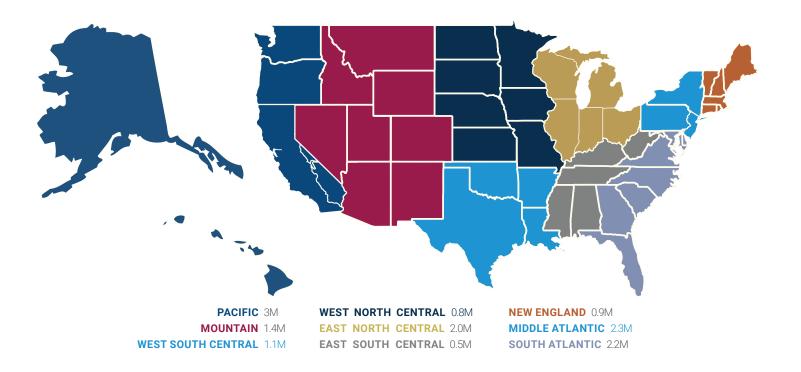


Ski Participation and Demographics



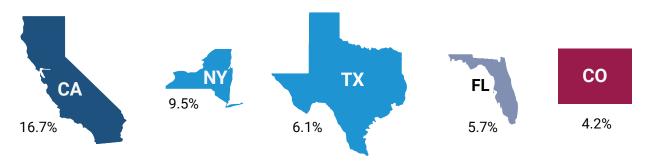
SKIING¹ BY REGION

TOTAL PARTICIPANTS: 14.3M



STATES WITH GREATEST SHARE OF TOTAL SKI POPULATION

These states contributed the greatest proportion of skiers to the total 14.3M ski participants in the US.



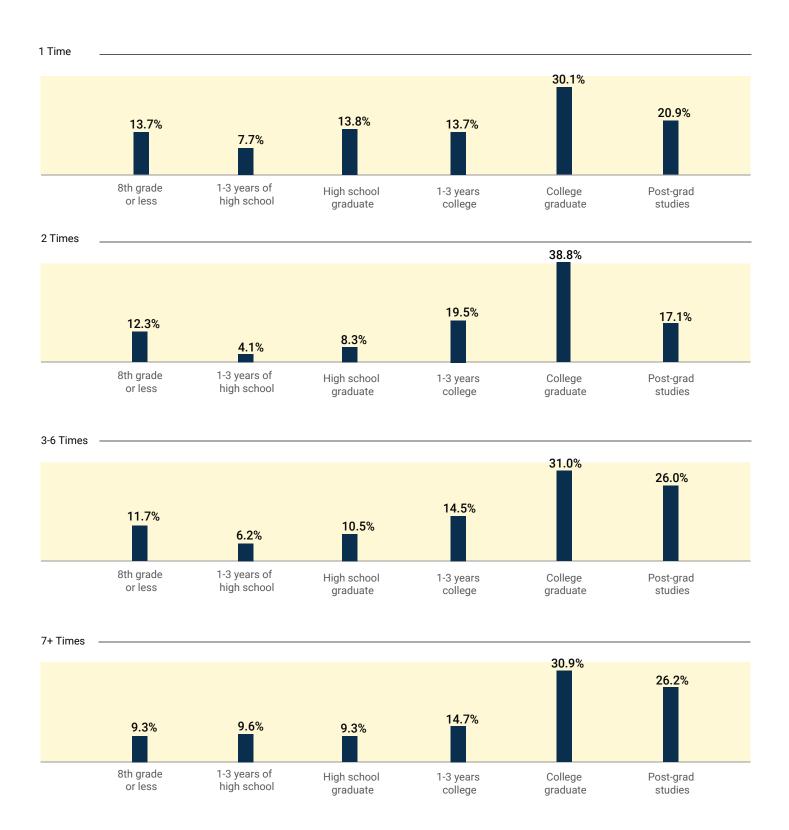
STATES WITH GREATEST PERCENTAGE OF SKIERS PER CAPITA

These states had the greatest proportion of skiers relative to their population.

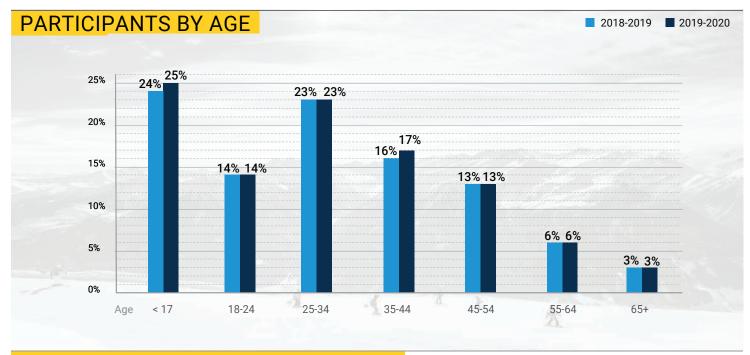




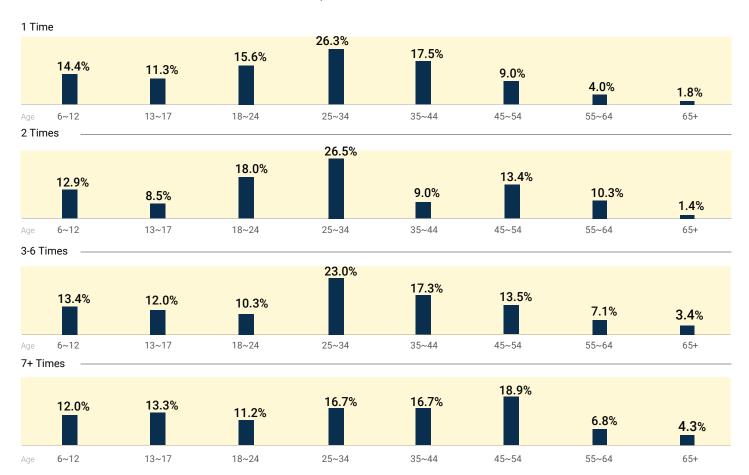
PARTICIPANTS BY EDUCATION & FREQUENCY







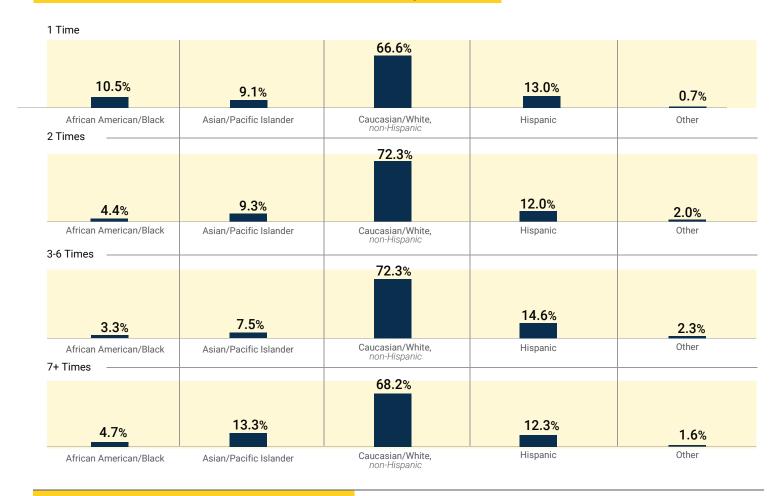
PARTICIPANTS BY AGE & FREQUENCY



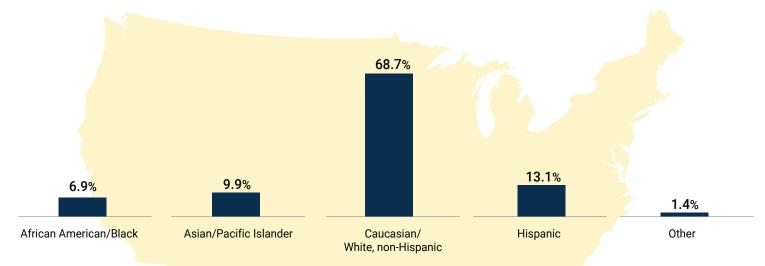


PARTICIPANTS BY ETHNICITY & FREQUENCY

2019-2020



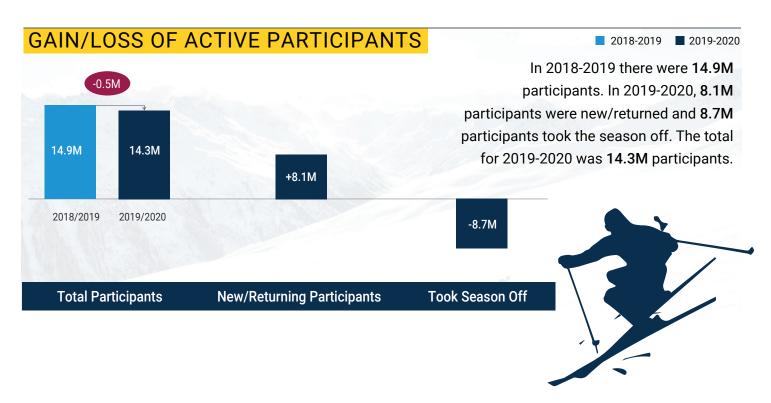
PARTICIPANTS BY ETHNICITY





PARTICIPANTS BY INCOME & FREQUENCY

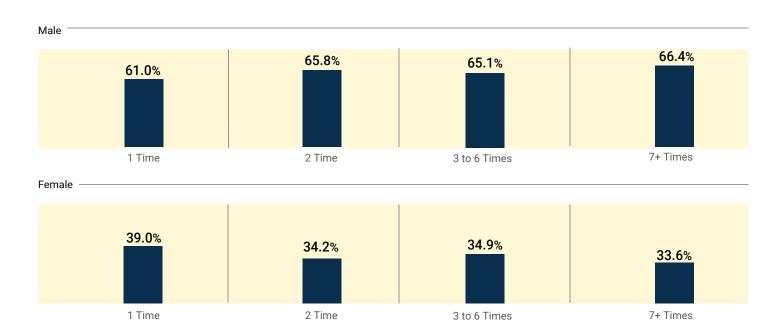






PARTICIPANTS BY GENDER & FREQUENCY

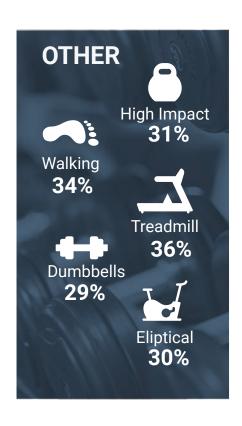
2019-2020



CROSSOVER ACTIVITIES







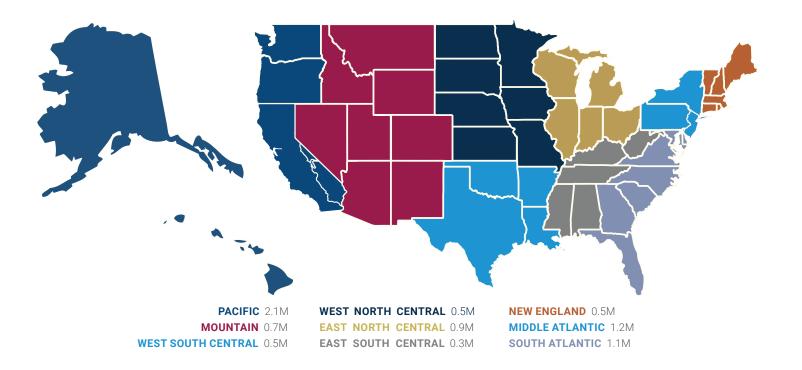


Snowboard Participation and Demographics



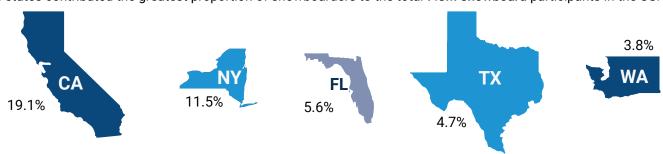
SNOWBOARDING BY REGION

TOTAL PARTICIPANTS: 7.9M



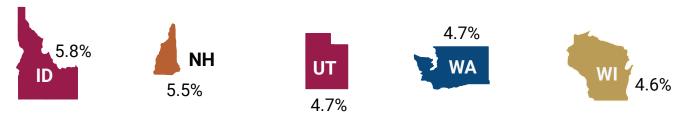
STATES WITH GREATEST SHARE OF TOTAL SNOWBOARD POPULATION

These states contributed the greatest proportion of snowboarders to the total 7.8M snowboard participants in the US.



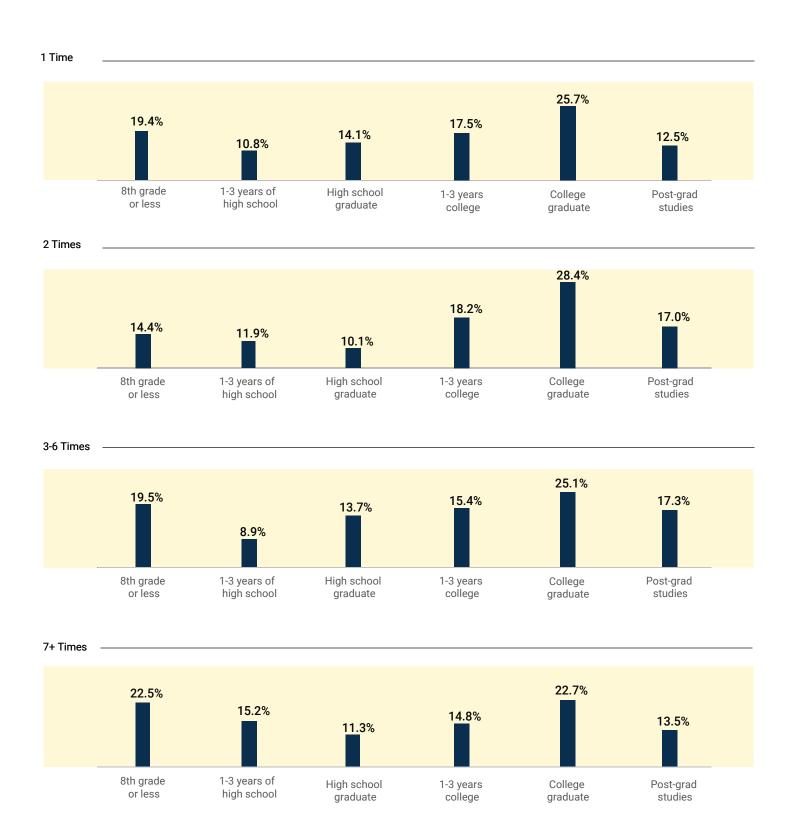
STATES WITH GREATEST PERCENTAGE OF SNOWBOARERS PER CAPITA

These states had the greatest proportion of snowboarders relative to their population.

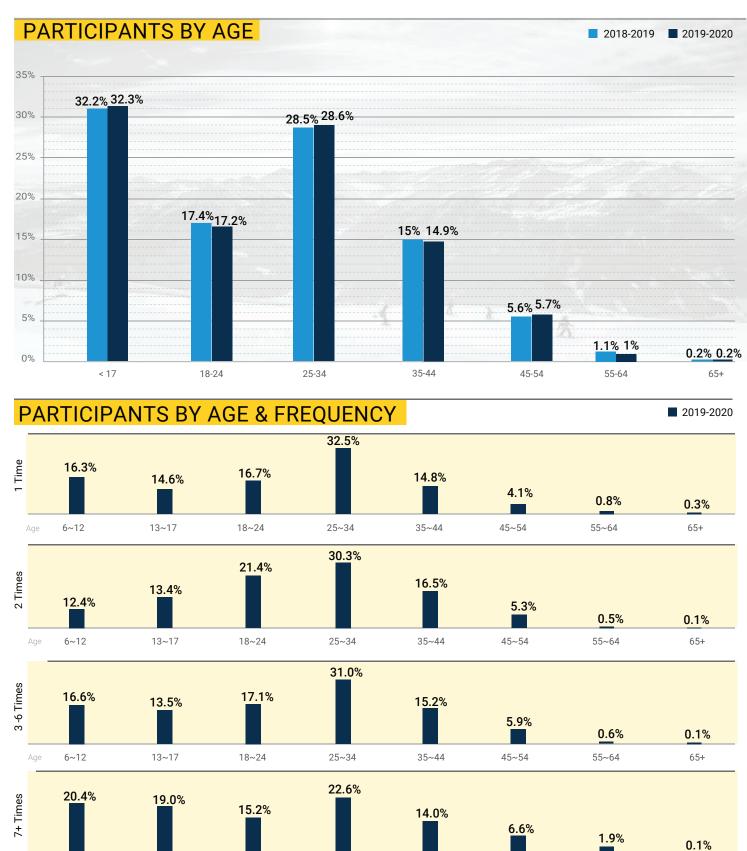




PARTICIPANTS BY EDUCATION & FREQUENCY







The numbers and percentages above are based on 7.9M total snowboard participants

SIA Participation Study 2019-2020

35~44

6~12

13~17

18~24

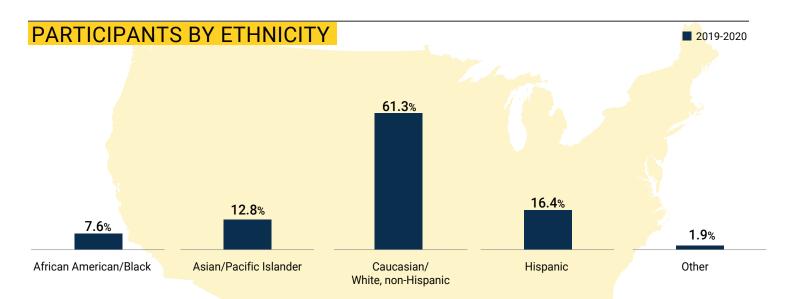
25~34



PARTICIPANTS BY ETHNICITY & FREQUENCY









PARTICIPANTS BY INCOME & FREQUENCY 2019-2020 40.9% 1 Time 16.7% 15.2% 13.6% 13.7% Under \$25,000 \$25,00 to \$49,999 \$50,000 to \$74,999 \$75,000 to \$99,999 \$100,000+ 41.0% 2 Times 19.6% 10.7% 15.1% 13.6% Under \$25,000 \$25,000 to \$49,999 \$50,000 to \$74,999 \$75,000 to \$99,999 \$100.000+ 40.4% 3-6 Times 22.7% 14.7% 11.9% 10.2% Under \$25,000 \$25,000 to \$49,999 \$50,000 to \$74,999 \$75,000 to \$99,999 \$100,000+ 46.3% 7+ Times 15.9% 14.9% 14.5% 8.3%

\$50,000 to \$74,999

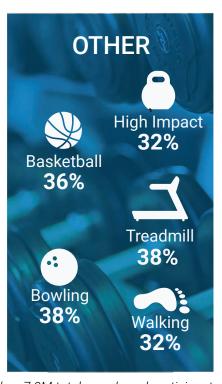
CROSSOVER ACTIVITIES

Under \$25,000

\$25,000 to \$49,999







\$100,000+

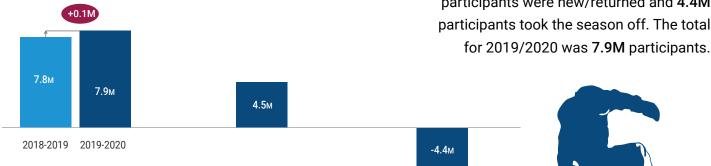
\$75,000 to \$99,999



GAIN/LOSS OF ACTIVE PARTICIPANTS

In 2018/2019 there were **7.8M**participants. In 2019/2020, **4.5M**participants were new/returned and **4.4M**participants took the season off. The total

2018-2019 2019-2020

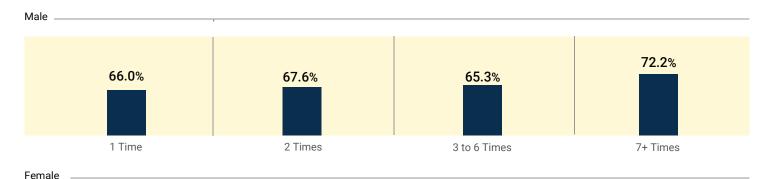


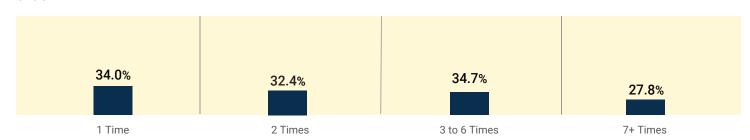
Total Participants

New/Returning Participants

Took Season Off

PARTICIPANTS BY GENDER & FREQUENCY





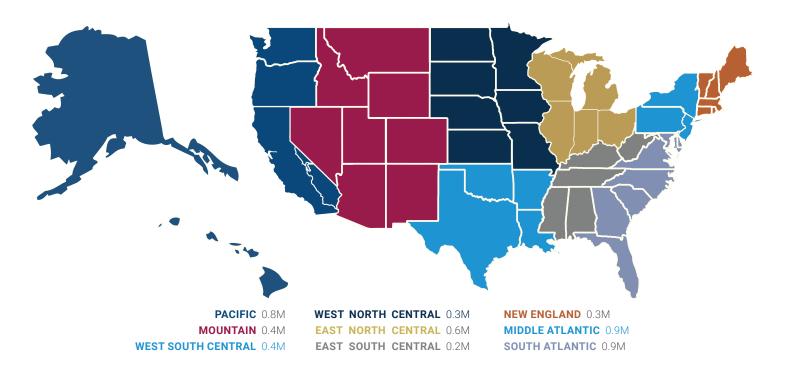


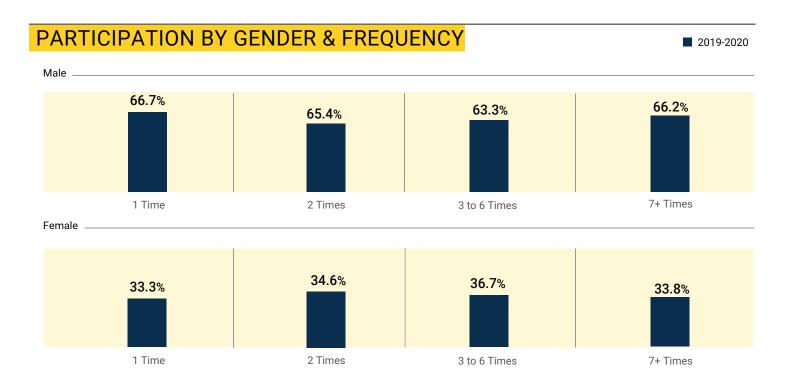
Cross-country Skiing Participation and Demographics



CROSS-COUNTRY SKIING BY REGION

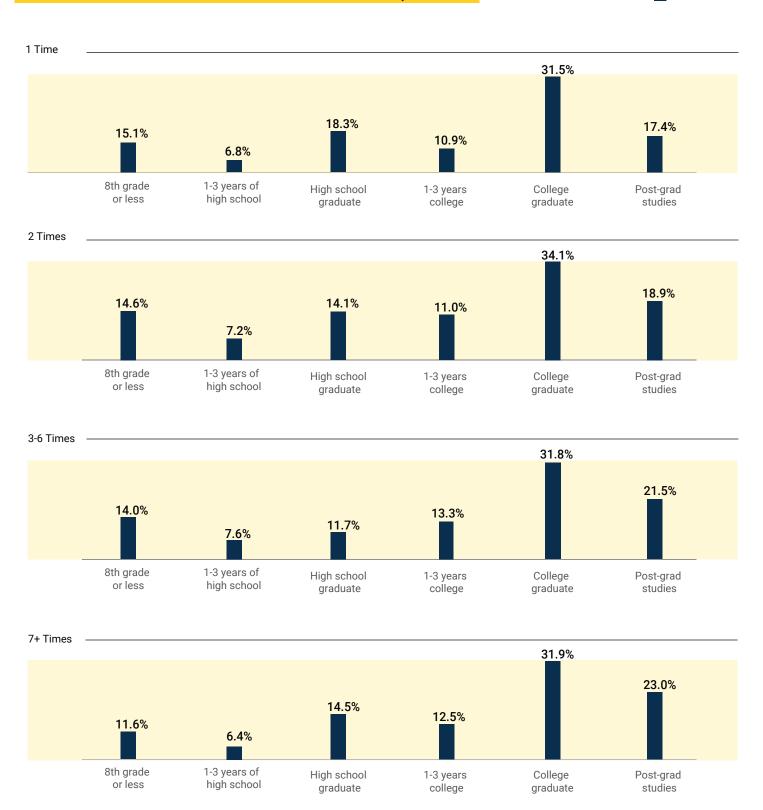
TOTAL PARTICIPANTS: 4.8M







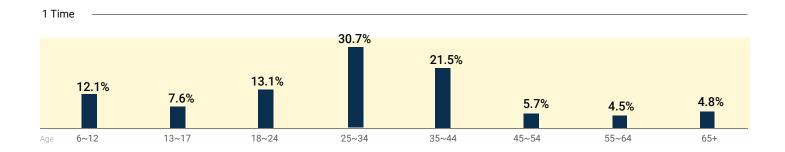
PARTICIPANTS BY EDUCATION & FREQUENCY

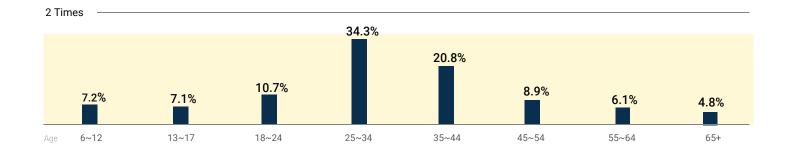


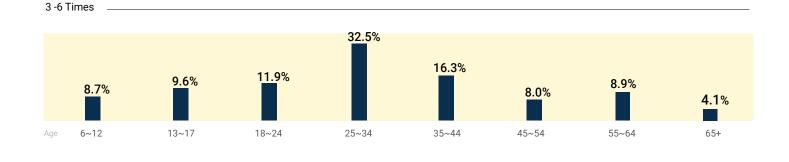


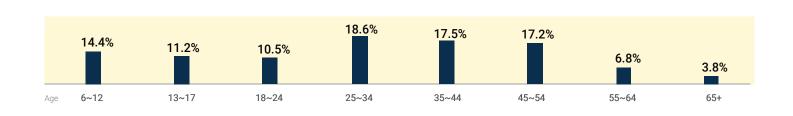
PARTICIPATION BY AGE & FREQUENCY

2019-2020





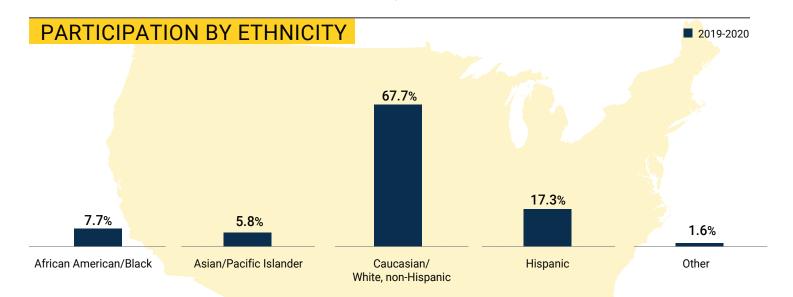




7+ Times



PARTICIPATION BY ETHNICITY & FREQUENCY 2019-2020 1 Time 62.0% 19.3% 11.5% 6.9% 0.2% Caucasian/White, non-Hispanic African American/Black Asian/Pacific Islander Hispanic Other 2 Times 66.4% 15.3% 9.1% 7.2% 2.0% African American/Black Asian/Pacific Islander Caucasian/White, Hispanic Other 3 - 6 Times 71.9% 16.5% 5.7% 4.4% 1.5% Caucasian/White, Other African American/Black Asian/Pacific Islander Hispanic non-Hispanic 7+ Times 69.4% 17.9% 2.7% 6.6% 3.3% African American/Black Asian/Pacific Islander Other Caucasian/White, Hispanic





PARTICIPATION BY INCOME & FREQUENCY

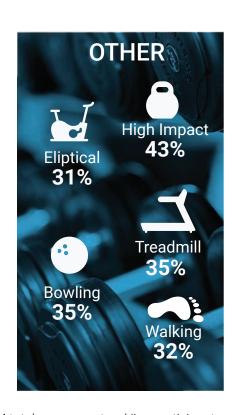
2019-2020

1 Time	12.3%	14.0%	13.3%	16.3%	44.1%
	Under \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000+
-				07.1%	
2 Times	10.0%	12.9%	13.9%	27.1%	36.1%
_	Under \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000+
3-6 Times	5.5%	13.1%	15.7%	22.4%	43.3%
	Under \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000+
7+ Times	6.0%	12.3%	17.4%	17.6%	46.6 <mark>%</mark>
	Under \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000+

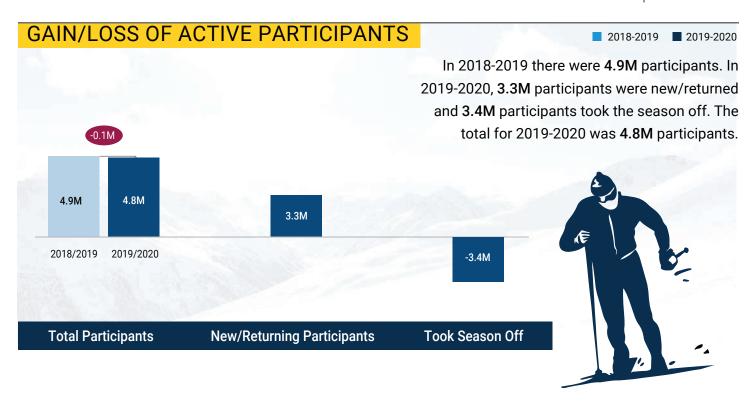
CROSSOVER ACTIVITIES



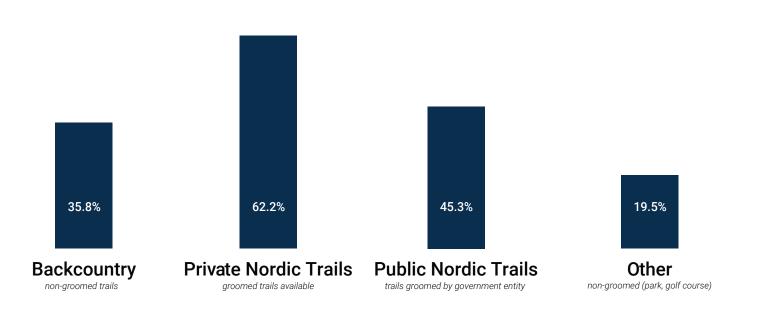








CROSS-COUNTRY SKIING TRAILS



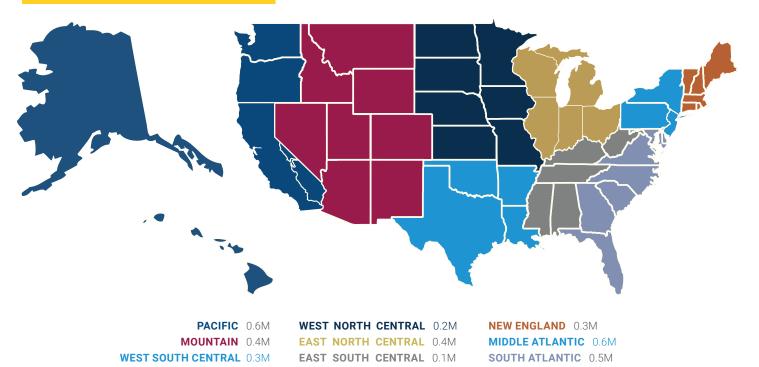


Snowshoe Participation and Demographics

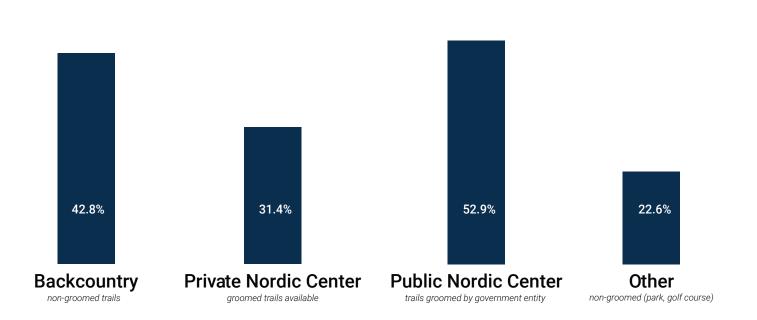


SNOWSHOE BY REGION

TOTAL PARTICIPANTS: 3.4M

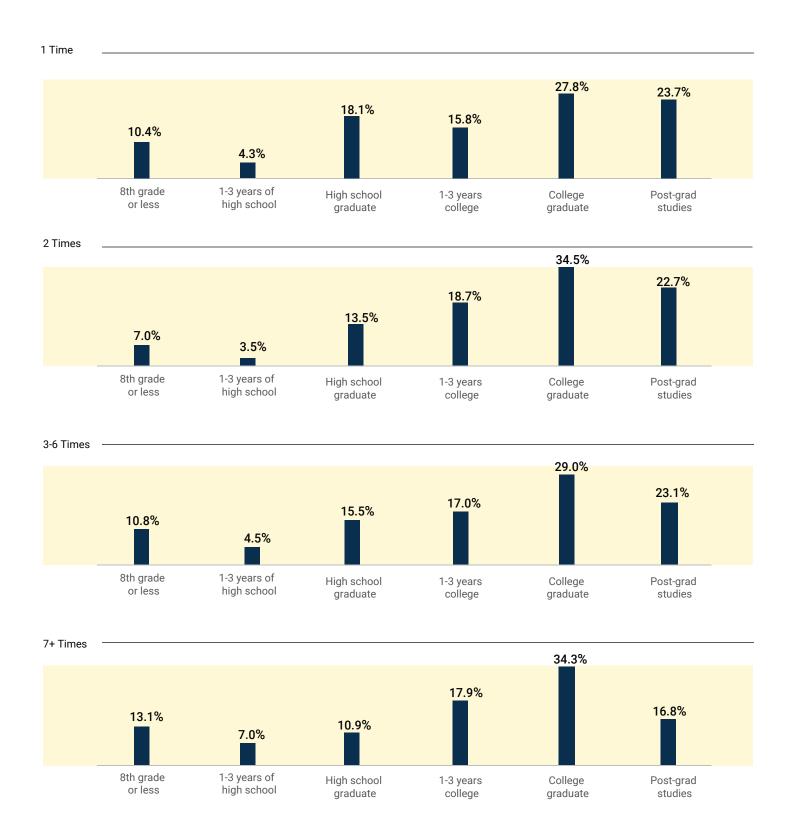


WHERE PARTICIPANTS SNOWSHOE





PARTICIPANTS BY EDUCATION & FREQUENCY



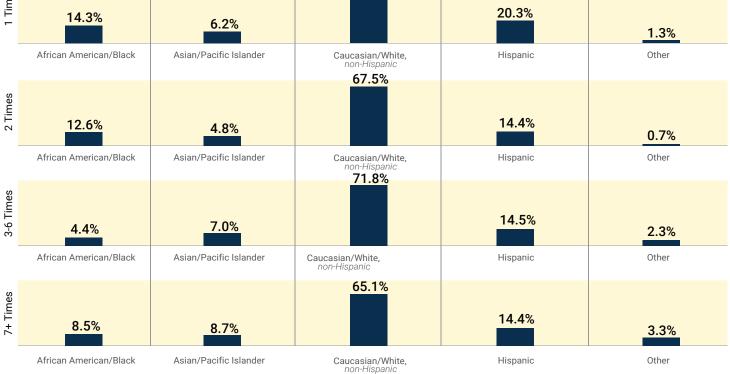


PARTICIPANTS BY GENDER & FREQUENCY 2019-2020 Male 67.7% 67.7% 66.2% 64.1% 1 Time 2 Times 3 to 6 Times 7+ Times Female 35.9% 33.8% 32.3% 32.3% 1 Time 2 Times 3 to 6 Times 7+ Times PARTICIPANTS BY AGE & FREQUENCY 2019-2020 1 Time 30.9% 14.8% 14.1% 10.0% 11.0% 8.4% 6.2% 4.6% 13~17 18~24 25~34 45~54 55~64 6~12 35~44 65+ 2 Times 32.4% 16.1% 12.4% 11.4% 9.5% 8.4% 6.3% 3.5% Age 6~12 13~17 18~24 25~34 35~44 45~54 55~64 65+ 3-6 Times 29.2% 14.0% 11.3% 10.3% 10.7% 10.9% 7.6% 6.1% 6~12 25~34 35~44 45~54 55~64 13~17 18~24 65+ 7+ Times 27.3% 12.7% 12.2% 11.8% 9.9% 10.6% 9.9% 5.6% 6~12 13~17 18~24 25~34 35~44 45~54 55~64 65+

Age



PARTICIPANTS BY ETHNICITY & FREQUENCY 58.0% 1 Time 20.3% 14.3% 6.2% Caucasian/White, non-Hispanic African American/Black Asian/Pacific Islander Hispanic



PARTICIPANTS BY INCOME & FREQUENCY

2019-2020

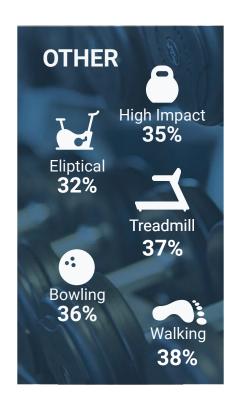




CROSSOVER ACTIVITIES







GAIN/LOSS OF ACTIVE PARTICIPANTS

In 2018-2019 there were **3.4M**

2018-2019 2019-2020

participants. In 2019-2020, **2.1M** participants were new/returned and **2.1M** participants took the season off. The total

for 2019-2020 was 3.4M participants.



-2.1M

Total Participants

New/Returning Participants

Took Season Off



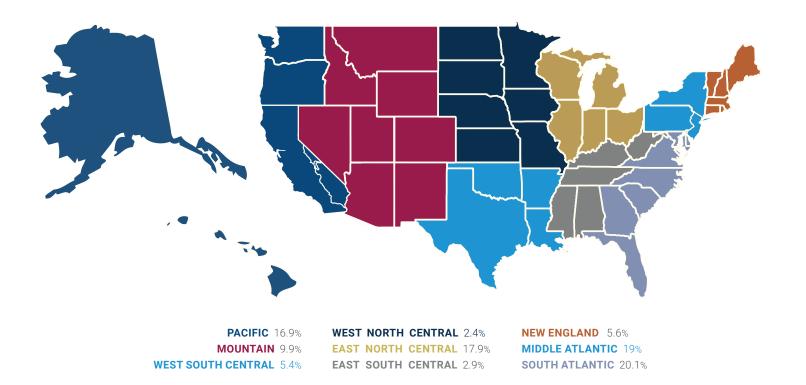


Snowboard Touring Participation and Demographics

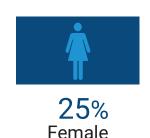


SNOWBOARD TOURING¹ BY REGION

TOTAL PARTICIPANTS: 652K



PARTICIPATION BY GENDER



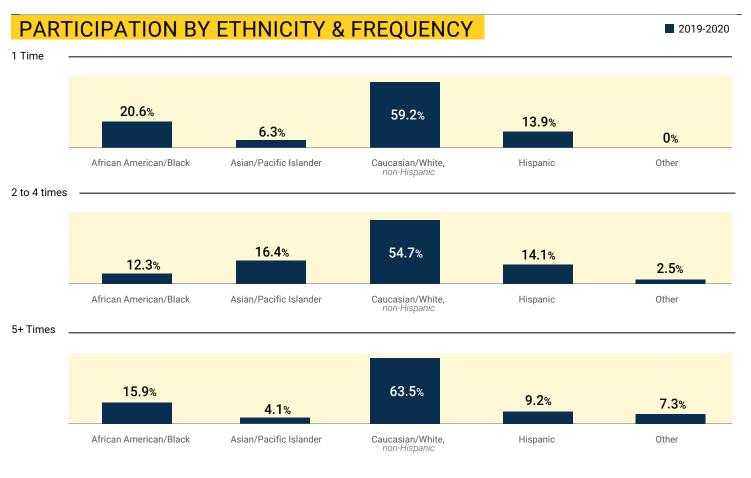


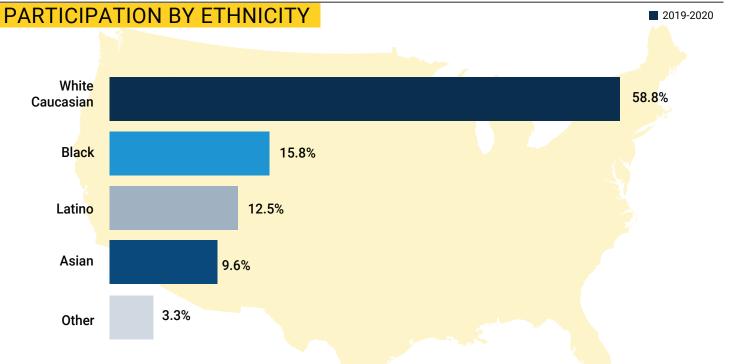
The numbers and percentages above are based on 652K total snowboard touring participants



PARTICIPATION BY GENDER & FREQUENCY 2019-2020 Male 76.7% 74.8% 74.1% 1 Time 2 to 4 Times 5+ Times Female 25.9% 25.2% 23.3% 1 Time 2 to 4 Times 5+ Times PARTICIPATION BY AGE & FREQUENCY 2019-2020 1 Time 44.0% 24.9% 21.0% 9.3% 0.4% 0.4% 55~64 18~24 25~34 35~44 45~54 65+ Age 2 to 4 times 48.0% 35.9% 18.4% 5.4% 1.7% 0.0% 18~24 35~44 45~54 55~64 65+ 25~34 5+ Times 37.5% 27.1% 24.3% 5.4% 0.4% 1.3% Age 18~24 25~34 35~44 45~54 55~64 65+









PARTICIPATION BY INCOME & FREQUENCY 2019-2020 35.8% 30.0% 1 Time 15.2% 10.2% 8.9% \$25,000 to \$49,999 \$50,000 to \$74,999 \$75,000 to \$99,999 Under \$25,000 \$100,000+ 44.1% 2 to 4 times 22.3% 17.4% 11.1% 5.1% \$100.000+ \$25.000 to \$49.999 \$50.000 to \$74.999 Under \$25,000 \$75,000 to \$99,999 56.0% 5+ Times 13.0% 14.9% 5.5% 10.5% Under \$25,000 \$25,000 to \$49,999 \$50,000 to \$74,999 \$75,000 to \$99,999 \$100,000+ PARTICIPATION BY EDUCATION & FREQUENCY 2019-2020 1 Times 24.6% 18.4% 16.5% 16.0% 14.4% 10.1% 8th grade 1-3 years of High school 1-3 years College Post-grad or less high school graduate college graduate studies 2 to 4 times 30.5% 17.5% 17.9% 14.8% 14.1% 5.2% 8th grade 1-3 years of High school 1-3 years College Post-grad or less high school graduate college graduate studies 5+ Times 25.1% 23.0% 15.4% 15.2% 12.5% 8.8% 8th grade 1-3 years of High school 1-3 years College Post-grad or less high school graduate college graduate studies

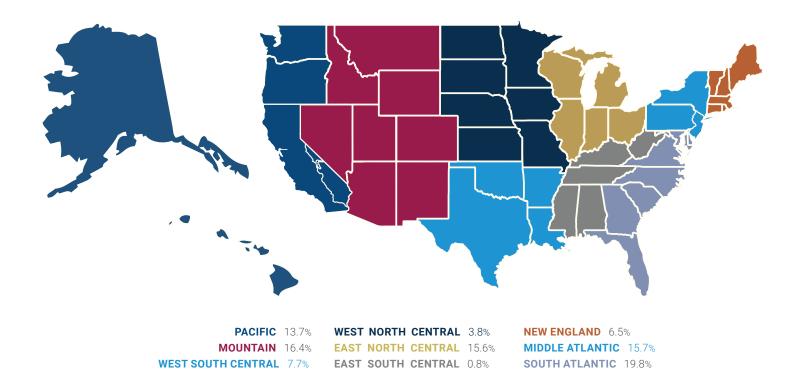


Alpine Touring Participation and Demographics

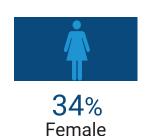


ALPINE TOURING¹ BY REGION

TOTAL PARTICIPANTS: 701K



PARTICIPATION BY GENDER





The numbers and percentages above are based on 701K total alpine touring participants
SIA Participation Study 2019-2020



PARTICIPATION BY GENDER & FREQUENCY 2019-2020 Male 70.5% 65.1% 62.8% 2 to 4 Times 5+ Times 1 Time Female 37.2% 34.9% 29.5% 1 Time 5+ Times 2 to 4 Times PARTICIPATION BY AGE & FREQUENCY 2019-2020 1 Time 52.6% 21.9% 14.9% 8.3% 1.4% 1.0% 18~24 25~34 35~44 45~54 55~64 65+ 2 to 4 Times 48.9% 18.3% 17.0% 11.6% 2.0% 0.3% 18~24 25~34 35~44 45~54 55~64 65+

15.7%

35~44

40.1%

25~34

13.8%

18~24

14.0%

45~54

5+ Times

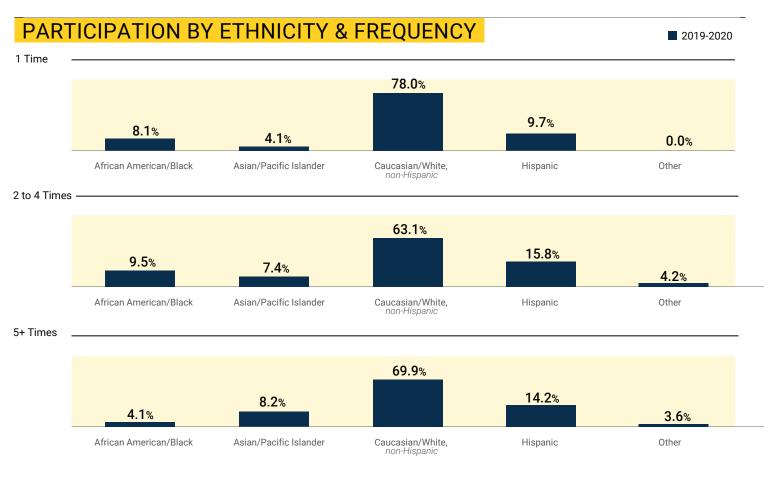
1.8%

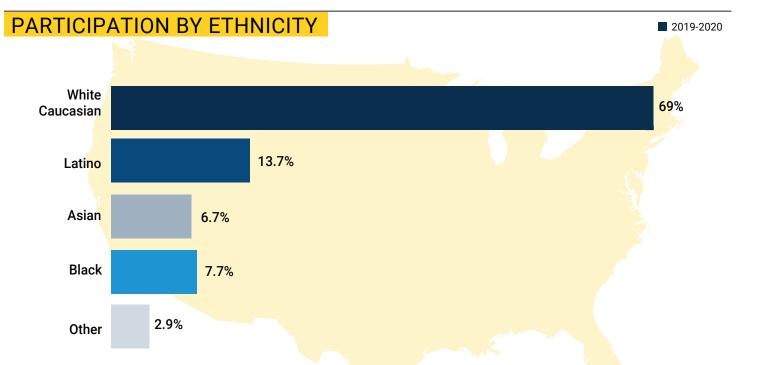
55~64

1.1%

65+









PARTICIPATION BY INCOME & FREQUENCY 2019-2020 40.9% 1 Time 27.1% 14.9% 12.6% 4.5% Under \$25,000 \$25,000 to \$49,999 \$75,000 to \$99,999 \$100,000+ \$50,000 to \$74,999 2 to 4 Times 37.1% 36.3% 12.6% 10.1% 3.9% \$25.000 to \$49.999 \$50.000 to \$74.999 \$100.000+ Under \$25,000 \$75,000 to \$99,999 43.6% 5+ Times 24.6% 17.2% 10.5% 4.2% Under \$25,000 \$25,000 to \$49,999 \$50,000 to \$74,999 \$75,000 to \$99,999 \$100,000+ PARTICIPATION BY EDUCATION & FREQUENCY 2019-2020 1 Times 33.4% 16.2% 15.9% 15.2% 5.2% 14.1% 1-3 years of 8th grade High school College 1-3 years Post-grad or less high school graduate college graduate studies 2 to 4 Times 32.9% 16.0% 15.3% 15.1% 12.4% 8.2% 8th grade 1-3 years of High school 1-3 years College Post-grad or less high school graduate college graduate studies 5+ Times 23.2% 21.4% 20.5% 16.3% 10.3% 8.2% 8th grade 1-3 years of High school 1-3 years College Post-grad or less high school graduate college graduate studies



Methodology



Methodology

The Snow Sports Participant Report 2019-2020 is derived from data produced by the Physical Activity Council (PAC), a partnership of eight of the major trade associations in US sports, fitness, and leisure industries. The overall aim of the data produced is to establish levels of activity and identify key trends in sports, fitness and recreation participation in the US. Partners include: Snow Sports Industries of America (SIA); Outdoor Foundation (OF); National Golf Foundation (NGF); Tennis Industry Association (TIA); United States Tennis Association (USTA); International Health, Racquet and Sportsclub Association (IHRSA); Sporting Goods Manufacturers Association (SGMA); and USA Football.

In 2019-2020, a total of 18,000 online interviews were carried out with a nationwide sample of individuals from U.S. proprietary online panels representative of the U.S. population for people ages six and older. Strict quotas associated with gender, age, income, region, and ethnicity were followed to ensure a balanced sample.

The 2019-2020 participation survey sample size of 18,000 completed interviews provides a high degree of statistical accuracy. All surveys are subject to some level of standard error - that is, the degree to which the results might differ from those obtained by a complete census of every person in the U.S. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.32 percentage points at the 95 percent confidence level.

A weighting technique was used to balance the data to reflect the total U.S. population ages six and above. The following variables were used: gender, age, income, ethnicity, household size, region, and population density. The total population figure used was 302,756,603 people age six and older.

The study looks at 122 different sports and activities in a variety of sub-categories including, but not limited to: team and individual sports, outdoor sports and activities like camping, hunting, and fishing; fitness and exercise, action sports, golf, tennis, and much more.

"Inactivity" was defined to include those participants who reported no to limited physical activity during the reporting year.

Data reported for "winter sports" are based on seasons: 2014 year is 2013-2014 season, 2015 year is 2014-2015 season, 2016 year is 2015-2016 season, 2017 year is 2016-2017 season, 2018 year is 2017-2018 season, 2019 year is 2018-2019 season and 2020 year is 2019-2020.



About SIA Research

In addition to this report, SIA publishes a wide variety of research products across consumer, retail and winter participation.

- CONSUMER INSIGHTS Two critical reports this season tracking consumer insights and trends. These
 reports are pivotal in helping retailers, resorts and suppliers better understand consumer sentiment as we
 navigate this winter and beyond.
 - Consumer Insights and Trends Report #1 "The Impacts of COVID-19 on Snowsports Consumer Trends and Insights"
- NPD MONTHLY RETAIL SALES REPORTS Top line retail data issued from November to May
- WHOLESALE SALES AND ORDERS Annual aggregated wholesale market data
- ANNUAL WINTER PARTICIPATION STUDY An in-depth look at winter sports demographics across the US
- PARTICIPATION INSIGHTS REPORT A closer look at the opinions and habits of winter sports participants
- CONSUMER PANEL YOY surveys conducted across a nationwide group of consumers:
 - Consumer Anticipation (early season)
 - Snowsports Retail Consumer Behavior
 - Retail and Direct-to-Consumer for Snowsports
 - Holiday Purchases
 - Snowsports Used Marketplace
 - Snowsports Consumer Rental and Service
 - Snowsports Technology and Participation
 - Diversity in the Snowsports Industry
- CUSTOM RESEARCH Creation of custom queries within our research database/raw data.

For more information, please reach out to research@snowsports.org