

# NSAA Beginner Conversion Study PSIA-AASI Winter 2015/16 Results

June 2016



Prepared for:

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## INTRODUCTION & METHODOLOGY

The primary purpose of the NSAA Beginner Conversion Study is to track the behavior of beginner skiers and snowboarders over time. This survey research effort and subsequent analysis are designed to allow participating resorts to better understand their beginners and benchmark their results to national results. By surveying the beginners over time, the study will ultimately provide insight into beginners' behavior, the frequency of their participation, their intent to purchase equipment, and their migration patterns to different resorts.

This longitudinal study is conducted in collaboration with various ski areas across the United States. Participating areas provide the email addresses of known beginner skiers and snowboarders at their resort. Each beginner is then sent a survey to complete regarding their experience at the resort. Additional questionnaires are emailed to the individuals over the course of the season and will be emailed in future seasons.

PSIA-AASI was a major industry supporter of the national study on beginners for the 2015/16 season. PSIA-AASI's investment in the study is fundamental to the growth of the program and allows a deeper understanding of the beginner snow sports participant and their lesson participation.

A total of 11,001 survey responses were received from beginners in the 2015/16 season. Half of beginners surveyed (51 percent) visited a Rocky Mountain region resort. Ski areas in the Northeast and Pacific Southwest (each 18 percent) were also well-represented, followed by the Southeast (9 percent), Pacific Northwest (2 percent), and Midwest (1 percent).

The following report analyzes the data of the beginner snow sports participant for the 2015/16 season on the aggregate level. The report reflects overall national results and segments the findings by equipment type and lesson participation where appropriate. The more detailed information will allow PSIA-AASI to better understand the similarities and differences between beginner skiers and snowboarders.

## OVERVIEW OF KEY FINDINGS

A brief overview of the key findings from the 2015/16 NSAA Beginner Conversion Study with specific regards to equipment type and lesson participation is presented below. The graphs and discussion throughout the report represent all respondents surveyed.

- Respondents are generally younger; most live in households with children. Roughly two in five respondents (42 percent) are under the age of 35, reflective of a relatively younger sample. An additional third (35 percent) are between the ages of 35 and 44, 16 percent are age 45 to 54, and 7 percent are age 55 or older.

Consistent with the younger age profile of the sample, over half of respondents (57 percent) reported living in a household with children. A quarter (23 percent) are singles without children, 14 percent are couples without children, and 6 percent are empty nesters.

- Roughly two-thirds skied; a large majority rented their equipment. Seventy percent of respondents skied during their visit to the ski area, and 30 percent snowboarded. A majority of respondents indicated that they rented their equipment (83 percent), and most rented it at the resort. An additional 16 percent own their own equipment.
- Lesson participation was strong; most take group lessons. Eighty-nine percent of respondents reported that they or their child took a lesson. Among those who took lessons, a strong majority (86 percent) took a group lesson, while 14 percent took a private lesson. Private lessons were typically shorter in duration – 81 percent of respondents who took a private lesson took a one to two hour or half day lesson. In contrast, group lessons tended to last longer, with 66 percent of group lesson participants taking a one to two hour or half day lesson, 24 percent taking a full day lesson, and 9 percent taking multi-day lessons.
- Family/friends impact decision on whether to take lesson. Among respondents who took a lesson, the factor that most positively influenced their decision was the recommendation of family or a friend (45 percent). Conversely, among those who did not participate in a lesson, the top reason cited for not taking a lesson was a friend offered to teach me (34 percent). Clearly, family and friends have a significant impact on the lesson decision.
- Respondents report high likelihood of return to the resort and to the sport. Overall, respondents had fun on their visit, with over two-thirds of both skiers (69 percent) and snowboarders (73 percent) providing a 9 or 10 rating on a 1 to 10 scale where 1 is “not at all fun” and 10 is “exceptional fun.”

On a scale from 1 to 10 where 1 means “not at all likely” and 10 means “extremely likely,” respondents rated their likelihood to ski or snowboard again and return to the same resort again, both this season and next. Relatively large shares of both skiers (49 percent rated a 9

or 10) and snowboarders (57 percent) indicated high likelihood of skiing or riding again this season, and their outlook was even more positive for next season (67 percent skiers, 74 percent snowboarders). Roughly half of both skiers (48 percent) and snowboarders (55 percent) said they are highly likely to return to the same resort this season. Respondents again reported a greater likelihood of returning next season (60 percent skiers, 67 percent snowboarders).

Over half of both skiers (56 percent) and snowboarders (60 percent) surveyed this season said they are highly likely to continue the sport as a life-long activity, rating it a 9 or 10 on a 10-point scale where 1 is “not at all likely” and 10 is “extremely likely.” Snowboarders were generally more positive about their likelihood to continue the sport and likelihood to return to the resort than skiers were.

- Motivations to try sport differ when segmented by intentions to continue sport. Respondents were asked to identify their motivations for trying downhill snow sports. These motivations are broken out by those who are extremely likely to continue skiing or snowboarding as a life-long activity (providing 9 or 10 ratings) compared to those who are not at all likely to continue the sport as a life-long activity (providing 1 to 6 ratings).

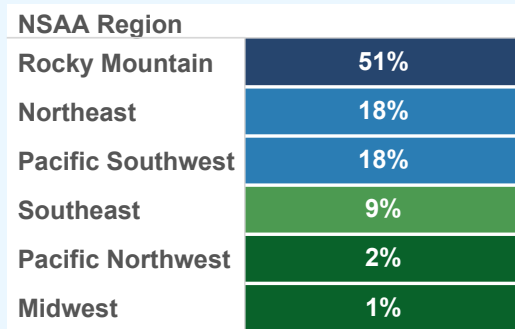
Among respondents who are extremely likely to continue the sport, top reasons include wanting to be able to join family and friends who ski or snowboard and something I’ve personally always wanted to do. Meanwhile, respondents who said they are not at all likely to continue the sport were considerably more likely to cite family or friends convinced me to give it a try and it was something I wanted to try at least once in my life as primary reasons for participating.

- Travel distance and cost cited as largest barriers to future participation; lesson participants more likely to identify cost of lesson as a barrier. Both lesson participants and non-participants selected travel distance/time (43 percent and 48 percent respectively) and cost of lift ticket/season pass (43 percent and 39 percent respectively) as the top two reasons they might not participate in skiing or snowboarding again this season. Perhaps unsurprisingly, lesson participants were considerably more likely to identify the cost of lessons as a barrier (17 percent) than non-participants (8 percent).

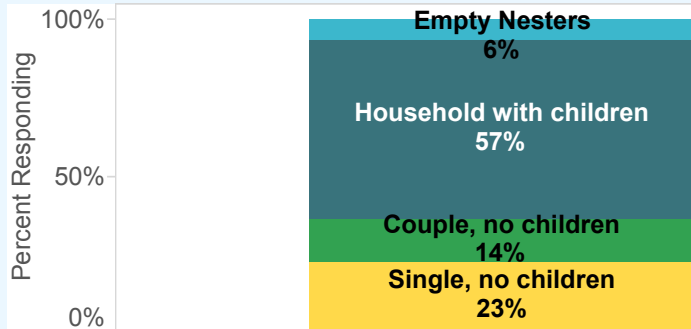
A graphical summary of the results is presented in the following pages.

## 2015/16 Findings: Guest Demographics

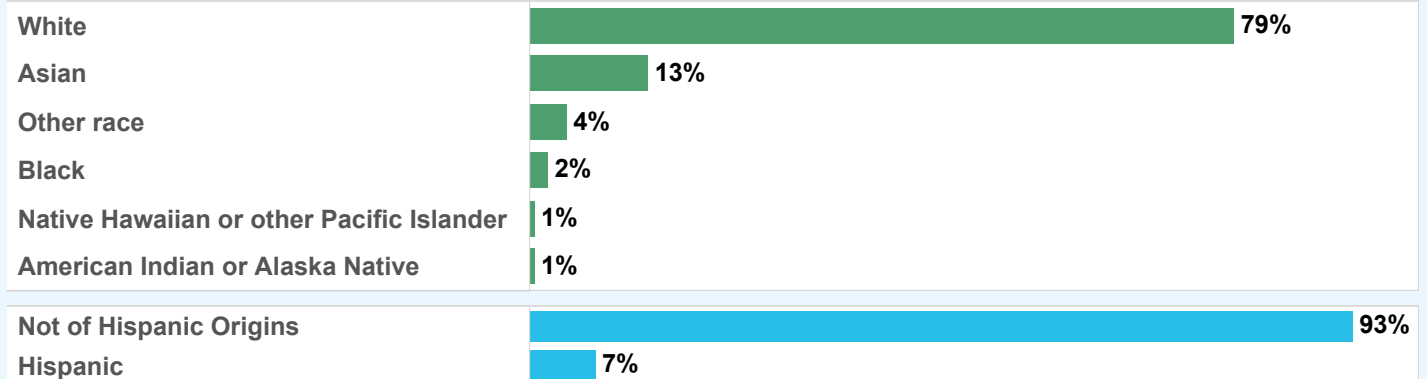
### NSAA Region of Resort Visited



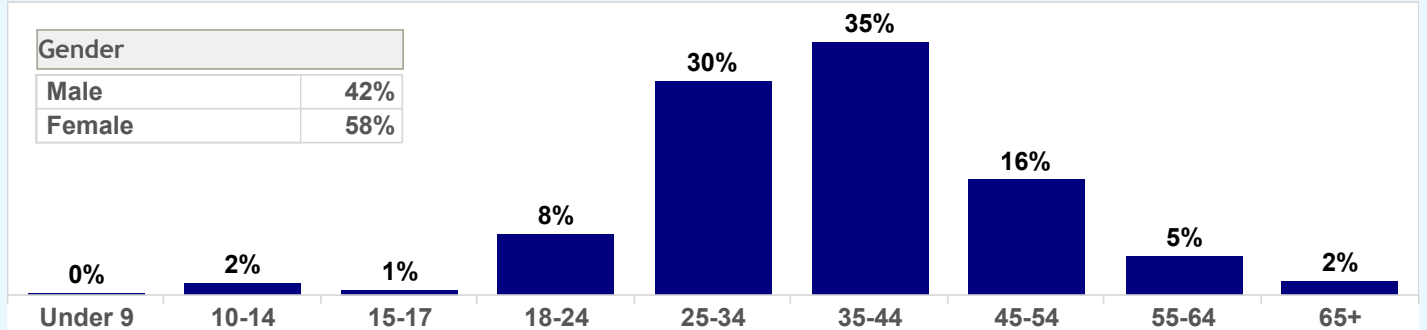
### Household Status of Guest



### Ethnicity of Guest



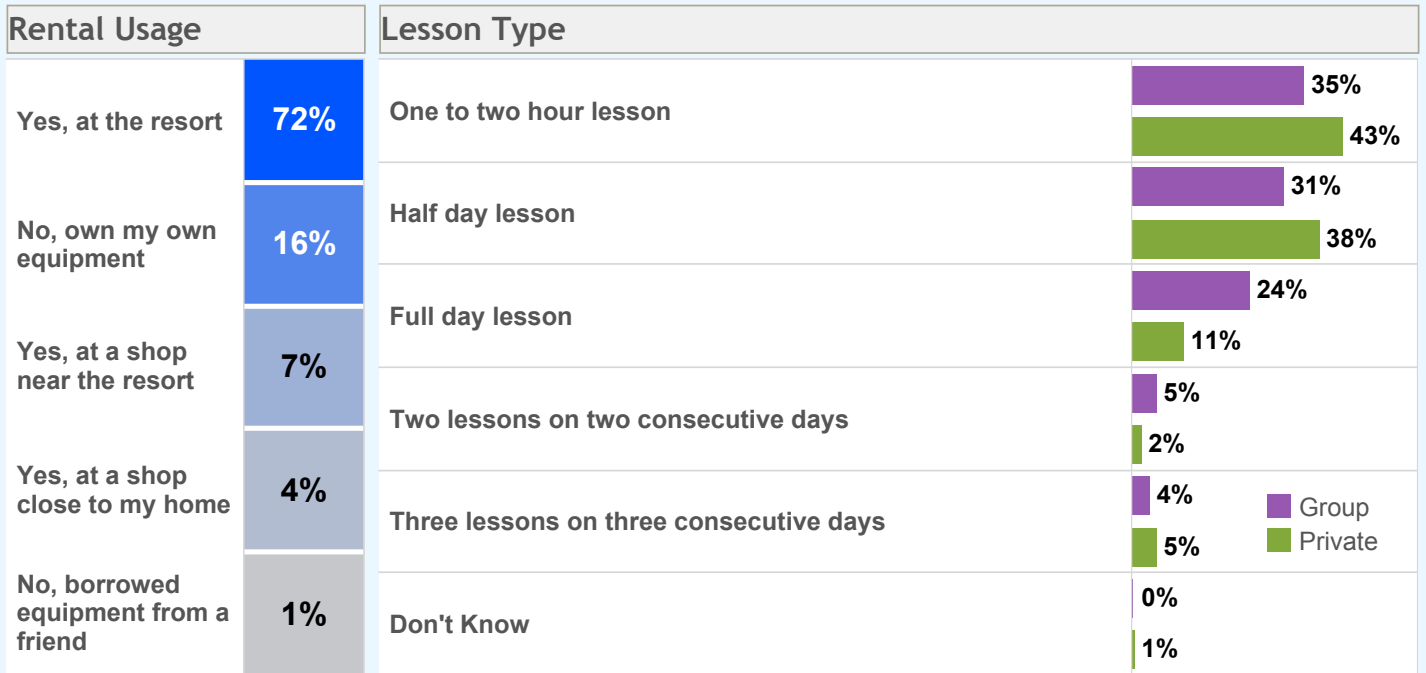
### Age of Guest



### Household Income of Guest

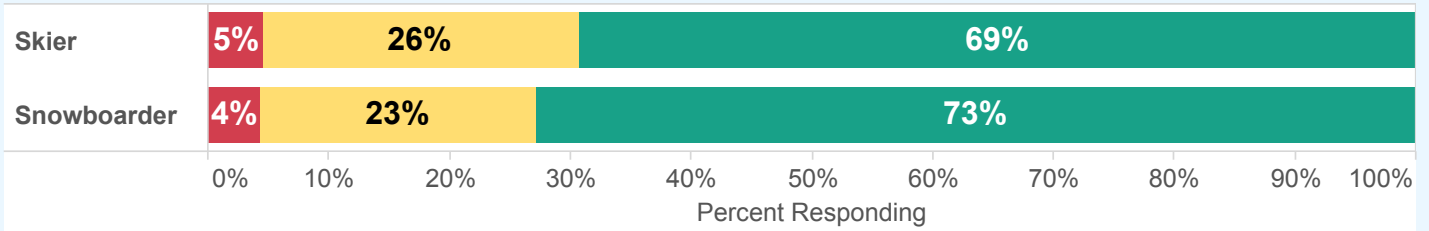


## 2015/16 Findings: Experience Characteristics



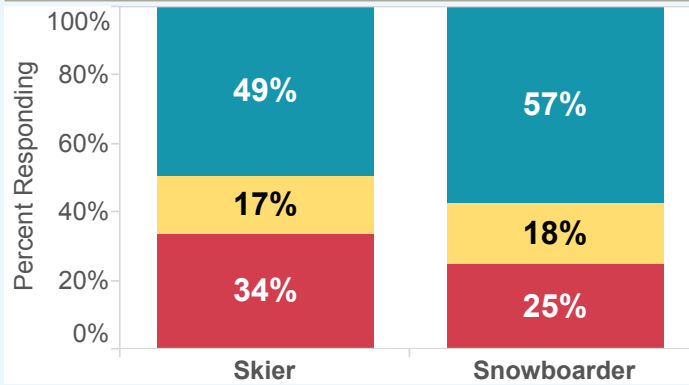
## 2015/16 Findings: Intent to Return

How much fun did you have on your recent visit to this resort?

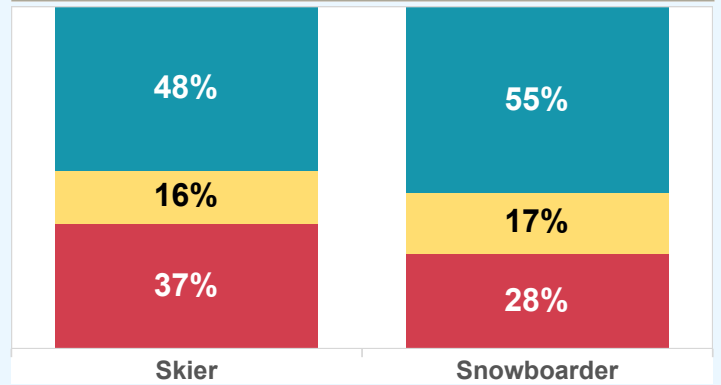


■ Not at All Fun      ■ Neutral      ■ Exceptional Fun

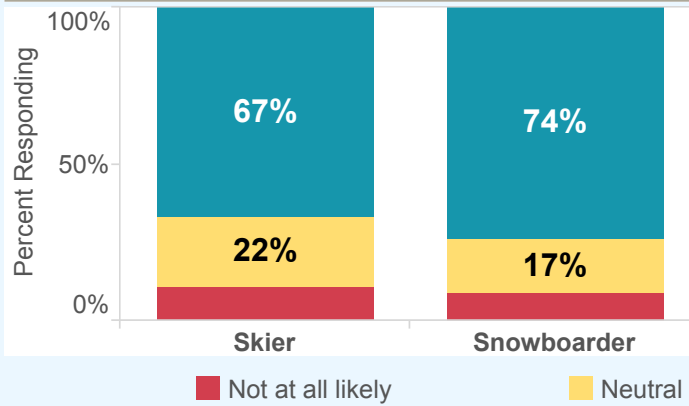
How likely to ski or snowboard again this season?



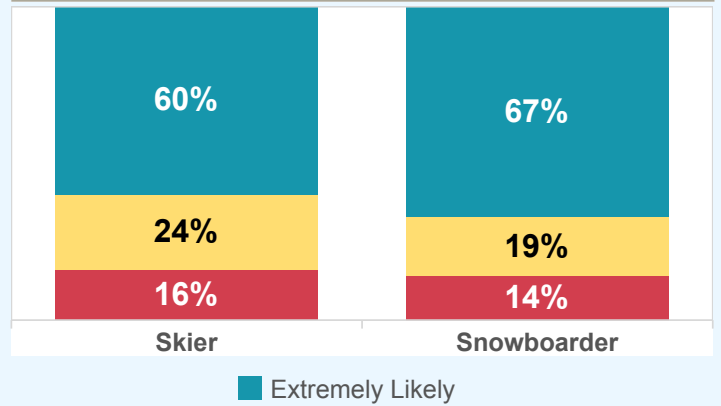
How likely to return to this same resort this season?



How likely to ski or snowboard again next season?

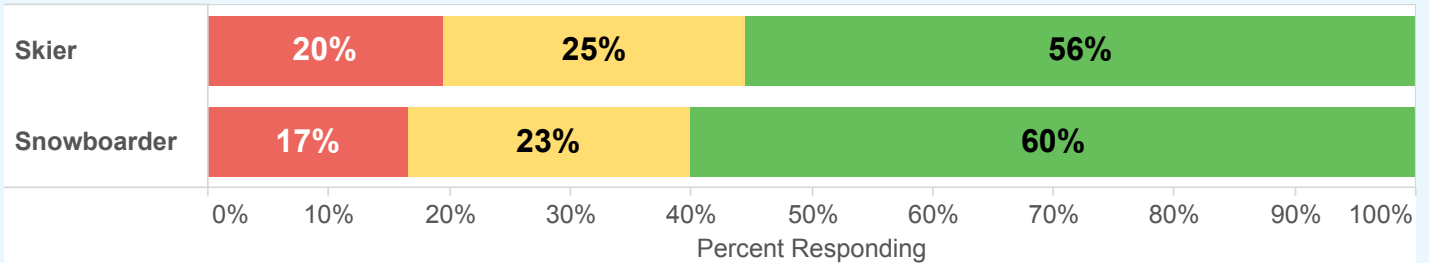


How likely to return to this same resort next season?



■ Not at all likely      ■ Neutral      ■ Extremely Likely

Likelihood to continue with the sport as life-long activity?



■ Not At All Likely      ■ Neutral      ■ Extremely Likely



## 2015/16 Findings: Motivations for Trying Snow Sports

### Motivations for Trying Snow Sports



### Motivations for Trying Snow Sports For Extremely Likely to Continue the Sport as Life Long Activity



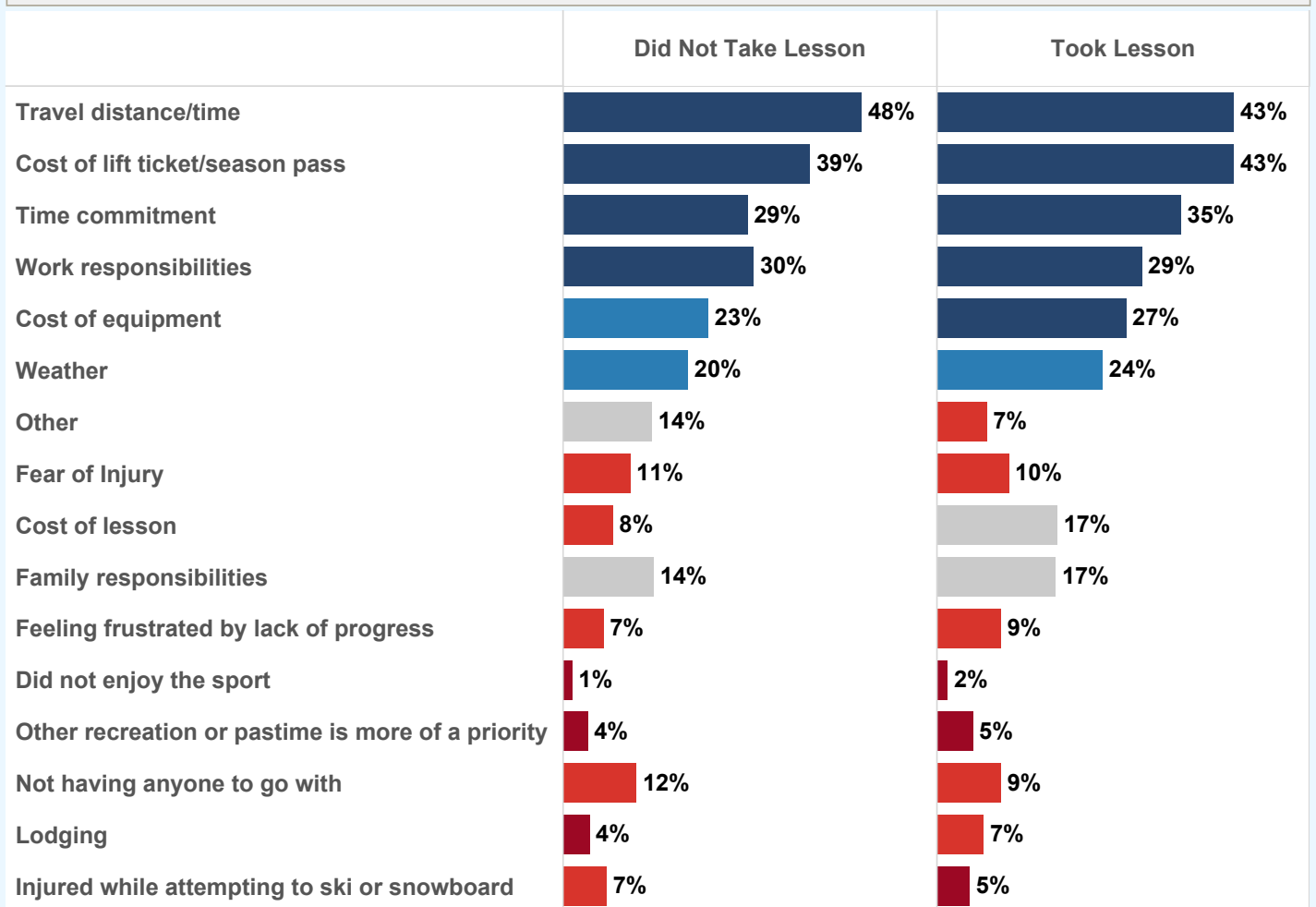
### Motivations for Trying Snow Sports For Not at All Likely to Continue the Sport as Life Long Activity





## 2015/16 Findings: Barriers to Participation

### Reasons Might Not Participate Again This Season



### Reasons Might Not Participate Again This Season Other Category Breakdown

