



### **Introduction**

For the second consecutive year, NSAA has teamed with RRC Associates to conduct a research study of beginner skiers and riders at ski resorts across the country. This summary report outlines the major findings to date (through early March 2004) from the survey conducted with beginners from the twelve NSAA test site resorts.

The overview findings presented in this deliverable to the NSAA membership are merely a snapshot of the overall results, and much more complete and detailed results will be discussed during the NSAA National Convention in Savannah, GA.

This year, the NSAA Beginner Test Site program was expanded from eight to twelve resorts, with six resorts continuing from last year's Test Site program and six new resorts joining this year. To date, nearly 400 responses have been received from the twelve NSAA test site areas, which include:

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|------------------------|--------------------------|
| • Breckenridge, CO     | • Mt. Hood Meadows, OR   |
| • Crystal Mountain, MI | • Northstar-at-Tahoe, CA |
| • Dodge Ridge, CA      | • Stevens Pass, WA       |
| • Holiday Valley, NY   | • Sunday River, ME       |
| • Hunter Mountain, NY  | • Wachusett, MA          |
| • Liberty Mountain, PA | • Winter Park, CO        |
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The test sites were selected in part because of their focus on beginner programs and updated beginner facilities, including reorganized rental shops and improved beginner terrain. Thus, it would be expected that the feedback from beginners at these test site areas would be generally more positive compared to a national sample of beginners, though for certain respects, even the test sites exhibited weaknesses and areas for improvement.

The survey asked for feedback on a variety of topics developed from the Beginner Research we have conducted thus far (including last year's Test Site research program, focus groups with beginners, and a panel of snowsports teaching professionals). Some of the key issues covered in this survey include reasons for trying snowsports; information sources used prior to the first time out and information the participant wished they had known

prior to their first time out; feedback on the rental process (including the most positive and most negative aspect of renting equipment); feedback on the lesson (again including the most positive and most negative component); reasons for not taking a lesson; level of intent to continue; motivations for continuing; and many other specific questions. The results provide a robust profile of beginners, especially when segmented by some of the attributes discussed above.

The National Convention will focus on differences between groups of beginners, including skiers versus snowboarders; various age group distinctions; the difference that group size makes in intent to continue; the gender of the participant; and other factors. Obviously, these individual segments exhibit differing patterns of motivation, satisfaction, and feedback, all of which will be covered in depth at the National Convention from May 17 to 20, 2004.

The format of this deliverable is to present some of the major observations and recommendations based on the research; the final report will have a more complete discussion of these and other issues, along with graphs displaying key information and comments from beginners.

### **General Findings**

- About half the respondent group (49 percent) was skiing or snowboarding for the first time – the true “never-ever.” Thirty-six percent has skied or boarded in the past, but were getting back into the sport (“revivals”). The remaining 15 percent were learning on different equipment (“crossovers”).
- Overall satisfaction with the first time out on the slopes averaged 8.2 out of ten, with 74 percent rating their overall experience an eight or higher. Ninety-seven percent of survey participants said that they intend to continue with skiing or snowboarding (81 percent were encouraged by their learning experience and intend to continue, and 16 percent were discouraged by their learning experience but would continue anyway).
- In general, beginners were moderately passionate about skiing and snowboarding, which is encouraging given the short time frame of their participation. About one-quarter said they were extremely passionate, another quarter was very passionate, and about half said they were moderately passionate. Less than 10 percent were very little/not at all passionate about skiing and snowboarding.
- The group of beginners was extremely positive about their intent to continue skiing or snowboarding again next winter. Over half rated their likelihood of continuing next year a 10 out of 10, with an average

rating of 9.1. Only 8 percent rated their likelihood a 6 or lower on the ten-point scale.

- In terms of motivations for continuing with snowsports, fun was by far the top reason for continuing, with 90 percent of respondents selecting it as one of the reasons. Exercise/health benefits, challenge, learning new skills, and gaining confidence were also important motivators for this group.
- The average length of time away from the sport for revivals was relatively short, at just 2 years on average. The size of the revival group and the short time frame away from the sport is significant, because it indicates the existence of a segment that has decided to return to try skiing or snowboarding again. Because of this pattern of return (giving skiing/snowboarding a second chance), this group is primed for conversion.
- Sixty-five percent were skiing, 33 percent snowboarding, and 2 percent using other equipment during their recent learning experience.
- Reasons for wanting to try skiing or snowboarding in the first place remained relatively consistent with results from last year, and include the following:
  - ▶ The challenge/excitement,
  - ▶ The scenery/beauty,
  - ▶ To be with family,
  - ▶ It's healthy and good exercise,
  - ▶ To get away,
  - ▶ To try a new sport or experience,
  - ▶ To be with friends.

The consistency in these patterns is important to resort operators in that the messages that will resonate with beginners are the same.

- The top information sources beginners used to learn what skiing and snowboarding would be like are talking to friends, looking at the resort website, and talking to family members. A handful of beginners said they read a resort brochure or read an article in a magazine. Almost no other information source was mentioned. These patterns are quite similar to those recorded last winter, meaning that positive word of mouth and resort web sites continue to be the key information sources for beginners. Resorts that have created a beginner-oriented web page with clear and detailed information continue to provide an important segment of first timers with valuable pre-arrival information.

## **Equipment Rental Findings**

- The vast majority (85 percent) rented their equipment, and the bulk of equipment renters (81 percent) went to the rental shop at the mountain. Thus, the resort equipment rental shop remains one of the most effective ways to reach the broadest segment of beginners. Focusing on improving the rental shop process and equipment (particularly boots) should be a priority at all resorts striving to improve their conversion rate.
- Most highly rated in the rental shop were ease of returning the equipment, helpfulness of the rental shop staff, overall ease of rental experience, and quality/ condition of the equipment. Areas for improvement included the level of crowding in the rental shop, the fit/comfort of boots, and the time spent fitting the customer with the proper equipment.
- Eighty-five percent of respondents said that the rental shop staff was aware that they were a beginner. Of those, 34 percent said they received extra attention in the rental shop because they were a beginner. This high level of identification and special treatment in the rental shops at the test site is admirable, as such a high level of service is very important to the overall experience and to returning again to ski or snowboard.

## **Lesson/Learning Center Findings**

- Eighty-six percent of respondents said they took a lesson, a figure that is likely somewhat inflated because most of the survey participants came from lesson rosters (from the NSAA Demographic study, a broader research project, 65 to 70 percent of beginners take a lesson).
- Of those who took a lesson, 65 percent were learning to ski and 33 percent were learning to snowboard, with 2 percent in an “other” lesson.
- The bulk of lesson takers (82 percent) were in a group lesson, with another 10 percent in a private lesson, 6 percent in a semi-private lesson, and 1 percent in a Station or Zone teaching lesson. Eighty-seven percent said that the lesson they took was the appropriate length.
- Satisfaction with attributes of the lesson instructor – instructor overall and instructor communication – were the highest rated parts of the lesson, a testament to the training and skills developed in the instructor teams at the Test Site resorts. Also highly rated were the lesson content, the amount learned, personal attention received, conclusion by the instructor, and the size of the class. Room for

improvement exists primarily in the level of crowding in the beginner area.

- About half of lesson takers said that they received a special offer or incentive to return for another lesson. Of those, 41 percent said the offer influenced them to take another lesson.
- Overall, the lesson had a very positive impact on the overall intention to continue participation – 77 percent rated the impact of the lesson an 8 or higher on a ten-point scale for the desire to continue, and 38 percent rated it a 10 out of 10.

### **Non-lesson Takers**

- About 16 percent of the group did not take a lesson. The top reason for not taking a lesson was having a friend or family member to do the teaching. A second tier of reasons for not taking a lesson included the lesson expense, inconvenient times for lessons, and thinking it would be easy to learn.
- Nineteen percent of non-lesson takers said an instructor offered assistance to them on the slopes. Of those, 35 percent said that the instructor helped with basic learning tips and tricks, and 35 percent also said that they enrolled in a lesson as a result of the interaction.
- Overall, several changes would have improved the experience for non-lesson taking beginners: better fitting boots, the ability to experience more of the mountain, the physical separation of the beginner area from other skiers/riders on the mountain, more surface lifts in the beginner area, a roving instructor in the beginner area offering free tips/advice, and better information on what to expect the first time out (see graph on following page).

While none of these factors was overwhelming in terms of the magnitude of importance, it does provide ski areas a general list of areas for improvement. Clearly, not every ski area is deficient in all these categories, but the list gives NSAA member resorts the opportunity to investigate their own performance in these categories.

**FIGURE 1**  
**WHICH WOULD HAVE MOST IMPROVED YOUR LEARNING EXPERIENCE?**  
**(NON-LESSON TAKERS ONLY)**

