ENGAGING GENERATION Z
Patterns, Behaviors & Perceptions Related to Travel, Activities & Snowsports

BY LUCY HARBOR, SENIOR RESEARCH ANALYST, RRC ASSOCIATES

THE 2018-19 NATIONAL DEMOGRAPHIC STUDY released last fall highlighted promising growth in the U.S. snowsports industry—a record-breaking 10.3 million U.S. participants took to the slopes that winter. However, NSAA thoroughly tracks participation by different groups, and a closer look at whom those 10.3 million skiers were told a slightly less optimistic story.

Generation Z skier participation numbers have plateaued over the past six seasons despite the millions of Americans who fall into this group—defined here as individuals aged 22 and younger during the 2018–19 ski season—growing into active teens and young adults during that time. By generation, Z currently makes up the largest share of U.S. skier visits, but the group is still a full 10 percentage points behind the share millennials contributed to skier visits 15 years ago, when they were around the age Generation Z is now.

Noting the critical need to engage Generation Z in snowsports, NSAA decided to dig a little deeper to uncover patterns, behaviors, and perceptions among this generation related to their interest and participation in travel, activities, and—of course—snowsports.

What’s the Big Deal?
Generation Z makes up the largest share of the global and U.S. population, and college-aged adults in this category alone control up to $143 billion in U.S. spending power, clearly representing a critical current and future base of snowsports customers and employees.1 While younger generations are vital to the future health and growth of any industry, past research by NSAA and other industry leaders has shown this dynamic to be particularly salient to snowsports, with the childhood and teen years serving as the primary window of entry for skiers and riders.

Generation Z makes up the largest share of the global and U.S. population, and college-aged adults in this category alone control up to $143 billion in U.S. spending power.

In other words, for snowsports, it is particularly important to stimulate trial early: 70% of today’s skiers and snowboarders started when they were 16 or younger. The best chance to create a lifelong skier is to start them young.

Every generation is shaped by the world in which they come of age, and any member of Generation Z will likely tell you that Zs are different from millennials in more ways than they are alike. Despite generational differences, looking back at millennial skier trends from a generation ago is the best way to benchmark Generation Z’s participation in snowsports today.

While the numbers show that Generation Z is not keeping pace, the good news is that Generation Z skier participation has increased dramatically over the past 15 winters (from when they were age 8 and under in 2004–05, to age 22 and under in 2018–19). That said, they have yet to meet the peaks in absolute numbers or in proportionate shares of skier visits millennials reached. This finding is especially worrisome as older Generation Z begins to approach the life stage when millennial visitation began to decline—that is, new careers, home ownership, moving to the city, young family responsibilities.
What Can We Do About It?
Attracting and engaging Generation Z skiers and snowboarders requires two basic understandings. First, we need to know the generation as a whole—especially the 96.6% of them who do not yet ski or snowboard. What do they look for in experiences and recreation, how do they like to travel, and what type of marketing grabs their attention?

Second, what do we know about the 3.4% of Generation Z who does currently ski and ride that could inform efforts to reach the rest? What sets them apart from older participants of today, and how do they compare to the young skiers and snowboarders of a generation ago?

Background Research
Generation Z plays an important role in the U.S. economy, and the travel and recreation industry has invested significant time and research dollars into identifying this generation’s values and preferences. The ski industry can leverage this existing research to better understand and reach this segment.

While Generation Z takes about the same number of overnight leisure trips per year as millennials, Zs tend to take longer trips (averaging over eight days), have higher budgets on most items (flights, food, transport, shopping and entertainment, though not hotels), and are more likely to travel domestically. But despite higher budgets for leisure trips and entertainment, members of Generation Z are value-conscious and actively seek out deals, incentives and special offers.

In addition to value, they care what their peers think, looking to social media and customer reviews to guide the decision-making process. When it comes to activities, Generation Z is interested in authentic, local experiences and learning about other cultures, special events and party-oriented trips. Their number one travel activity is eating out.

Research on youth sports shows that parents are willing to invest a significant amount of money to keep their children involved and feel that the most important outcome is that their children have fun. This is good news, since parents also rate skiing/snowboarding as one of the least stressful sports for their kids.

The Latest on Generation Z Skiers & Snowboarders
While secondary research on Z tells us about the generation as a whole, the NSAA National Demographic Study reveals invaluable information about the segment that is currently active in snowsports.
In comparison to older generations in 2018–19:

- Generation Z has the highest share of snowboarders at 41%—compared to 39% of millennials, 17% of Generation X, and only 4% of baby boomers.
- 8% of Generation Z went skiing/snowboarding for the first time in 2018-19, and 14% were beginners—a higher share than older generations in 2018-19, but not surprising due to age.
- 34% of Generation Z skiers and snowboarders use the terrain park—the highest share of any generational cohort.
- 23% of Generation Z skiers/snowboarders are of non-white race/ethnicity, similar to millennial skiers/snowboarders (22%). At 26% non-white, older Generation Z (17–22) is the most diverse segment.

Looking Back

We know how Generation Z skiers and snowboarders compare to millennials, Generation Xers, and baby boomers out on the slopes today, but how much of those differences are simply due to their age? Are today’s young skiers any different from young skiers in the past? To answer this question, we dug into the archives to compare today’s older Generation Z (aged 17–22 in 2018–19) to older millennial skiers and snowboarders aged 17-22 in 2004-05. Here’s what we found out.

Today’s 17 to 22 year-old segment:

- May have the highest share of snowboarders out on the slopes today, but are less likely to be snowboarding than millennials were (45% vs. 56% in 2004–05) and more likely to be skiing (50% vs. 40% among millennials).
- Is much more likely to be wearing a helmet (79% vs. 25%), a steady trend across all age groups, as helmet use has grown more prevalent.
- Is more likely to be first-timers or beginners (23% vs. 15%) and more likely to be taking a lesson (13% vs. 5%), suggesting that today’s skiers/snowboarders are taking up the sport at a later age. In fact, they are likely to try skiing/snowboarding for the first time about a year later than the corresponding group.

Compared to older generations in 2018–19:

- Generation Z skied an average of 5.6 days in the 2018–19 season, more than millennials (4.9 days) but less than Generation X (5.8 days) and baby boomers (7.6 days).

Gen Z is more likely to be first-timers or beginners and more likely to be taking a lesson, suggesting that today’s skiers/snowboarders are taking up the sport at a later age than millennials were.

Gen Z is more likely to be renting equipment, and ski fewer days per season, suggesting that today’s young skiers/snowboarders may be less committed to the sport than their predecessors, and participate more casually.

Gen Z has a much higher Net Promoter Score.

Gen Z is more racially and ethnically diverse (26% non-white vs. 17%), a facet of Generation Z overall, as U.S. youth trend more toward diversity.
### Key Findings and Action Items to Attract a New Generation of Skiers and Riders

<table>
<thead>
<tr>
<th>Social media is a critical information source for Generation Z.</th>
<th>Encourage them to share what they love about your resort with their network.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zs are more likely to snowboard, use terrain parks, rent equipment and be beginner ability level.</td>
<td>Create features and learning terrain to make it fun and easy to get started.</td>
</tr>
<tr>
<td>Generation Z is traveling and looking for value and deals with authentic experiences and high-quality food.</td>
<td>Emphasize deals offering new experiences, local activities and cuisine.</td>
</tr>
<tr>
<td>Exploring, learning, experiencing and living like a local are of high interest to Generation Z.</td>
<td>Offer insider experiences that appeal to these interests.</td>
</tr>
<tr>
<td>Parents of Generation Z prioritize starting kids at a younger age and are willing to pay for their children to participate in sports for fun.</td>
<td>+ Emphasize physical and mental health benefits of participation to get parents interested. + Parents might want to participate with their children, so consider a family lesson product.</td>
</tr>
<tr>
<td>Generation Z is skiing fewer days than prior generations at that same age, consistent with more casual participation in other sports among this cohort.</td>
<td>Flexible, lower-frequency, and mobile-friendly ticketing will be of high importance.</td>
</tr>
<tr>
<td>Social activism is popular among young adults, and increasing racial diversity among Generation Z skiers/snowboarders is a positive, both for visits and employment.</td>
<td>Emphasize outreach and inclusion programs that are sponsored or run by your organization and find creative ways to encourage opportunities for non-participants to join snowsports.</td>
</tr>
</tbody>
</table>

In 2004–05 (median age of 11 years old at first trial for older Generation Z vs. 10 years old for millennials).

+ Is more likely to be renting equipment (40% vs. 23%), and ski fewer days per season (4.7 days vs. 5.4), suggesting that today’s young skiers/snowboarders may be less committed to the sport than their predecessors, and participate more casually.
+ Has about the same likelihood to have dropped out of snowsports for one or more seasons, and then returned within the past five seasons.
+ Has a much higher Net Promoter Score (72% vs. 31%).
+ Is more likely to be on a day trip (61% vs. 52%) and skiing at a resort where they own a season pass (38% vs. 33%).
+ Is more racially and ethnically diverse (26% non-white vs. 17%), a facet of Generation Z overall, as U.S. youth trend more toward diversity.

### What Does It All Mean?

After reviewing the existing literature on Generation Z, and taking a deep dive into the NSAA National Demographic Study data about current and past young skiers, we’ve come up with some key findings and action items to help ski areas reach and retain your next generation of skiers and riders (see table above).

Generation Z already makes up the largest cohort of skiers and snowboarders in the U.S., so tactics and strategies to engage them further as outlined above may help to increase participation frequency and leverage the size and spending power of this generation now and in the future of snowsports.

### REFERENCES

1. “The Power of Gen Z Influence: How the Pivotal Generation is Affecting Market Spend” by Joe Cardador, Jeff Fromm, and Angie Read, Published by Barkley January 2018
3. “Meet Gen Z: The Traveling Generation” Karen Egolf, Ad Age and UNIDAYS, May 2018
4. “New Horizons IV: A global study of the youth and student traveller” WYSE Travel Confederation, June 2018