




CONVERSION EFFORTS:
**What Do Snowsports,
Golf, and Tennis**
Have in Common?





When I was 12, I attended a school ski trip to Ski Roundtop in Lewisberry, Pennsylvania. I was ready to rip, with Scotch-guarded jeans and chartreuse gaiters. There was only one problem: I had never skied. I deferred on lessons, citing pride, as I wanted to ski with Suzie Holt, my crush that week. Holt was a good skier, and I wanted to prove my mettle. So I flailed on the easy slopes and broke my thumb. Suzie and I didn't work out, but in the end I became a lifelong skier—and she, not.

By Brian Irwin



The holy grail as to what transforms a new skier into a “lifer” has eluded the snowsports industry for decades. And we aren't alone. Other lifetime sports, including golf and tennis, struggle with the same challenge. All three sports have experienced the ebb and flow of participation along with the effects on revenue and jobs, along with the concern that a much-loved activity will lose relevance over time. What lessons can we learn from each other to increase participation and turn people into lifelong enthusiasts?

During the 1980s, skiing had few worries on this frontier, as the growth of the sport, when measured in ticket sales, was climbing steadily. However, in that decade the bubble appeared to have burst, ticket sales dropped, and some areas closed. The industry recovered admirably, marching along with steady growth right up to the present day. Despite this truth, the fact remains that only roughly 17 percent of first-time skiers or riders convert into lifelong enthusiasts, defined by the industry as sliding on snow five or six times a year.

The process of conversion from a nascent skier to a lifer is very complex and multifactorial. Components ranging from the economy to climate change and from social trends to media coverage all influence the conversion factor at one level or another. Clearly one of the best ways to predict what will bring people back to ski areas time and time again

is to analyze what they like about the experience.

According to RRC Associates, a Colorado-based tourism market research and analysis firm, the “mountain experience” is ranked as the number one reason people visit ski areas, followed by the desire for rest and relaxation, and a thirst for the uniqueness of the ski area and resort town. In essence, people crave what we already have: idyllic ski villages with scenery and history. But how can we fine tune that offering to make it all the more tempting for guests? Ski areas spend a lot of time, money, and brain power in the continual quest to provide the “perfect” experience.

Skiing and riding aren't particularly inexpensive activities, but a lot of people still invest in the experience. According to RRC data, about 47 percent of skiers/riders come from households with incomes less than \$100,000.

This same fact holds true for other lifetime sports, like golf, where the investment may be steep but doesn't typically dissuade participation. Tennis is yet another sport where—although free courts pepper most of our country—the typical player also comes from a middle- or higher-income bracket.

Along with these demographic parallels among the three industries, what other common factors influence the fluctuation of growth in our respective sports?



The number of occasional golfers in the U.S. has climbed from 19.5 million in 1983 to 24.7 million in 2013, according to the National Golf Foundation—the trade association and primary research source for the industry. Despite that growth, the number of core golfers has remained relatively stable at 13.4 million in 1983 and 13.6 million in 2013.

Tennis's numbers are slightly more positive: Participation was up 4 percent to a total of 17.68 million tennis players in 2013, according to the Physical Activity Council's annual Participation Study, which tracks sports, fitness, and recreation activity in the U.S. The report also indicated a 5 percent increase in frequent tennis players (those who play 21 or more times per year) to 5.48 million.

Skiing/snowboarding? We're actually doing fairly well, despite a low rate of conversion to core lifers. RRC's *Kottke National End of Season Survey* and *National Demographic Study* revealed that in 2014 there were 9.6 million total active skiers and riders, up from 8.8 million only two years prior. However a longer term analysis shows that the number of U.S. skiers/riders has ebbed and flowed, peaking in 2009 at 10.6 million. As stated, there are many factors that play into the total number of participants, ranging from the state of the economy to climate variability. What is perhaps most interesting is the demographic of the modern skier/rider and what's happening in terms of composition of our customer base.

RRC's data found that in the last decade there's been a significant upswing in the number of 18- to 33-year-old snowsports enthusiasts in the U.S., to the end that they now make up 22 percent of the total customer base. In addition, the number of visits by those customers—the Millennial generation—has also climbed, while the number of visits among

12- to 20-year-old skiers/riders has fallen slightly. Generation Xers, 34 to 49 year olds, are another core group that has gradually risen to now account for 21 percent of the total population.

Compared to 1996's data—when the percent of Millennial and Gen-X customers combined was 55.3 percent of the total U.S. skiing and riding population—last year this group comprised 74.3 percent of the total U.S. participants. The Baby Boomers and the Pre-Boomer population fell from 44.7 percent of total participants in 1996-97 to only 20.5 percent in 2013-14. In summary, the meat of the market for skiers and riders rests in the 18- to 49-year-old group.

There isn't accessible congruent data for golf and tennis such that these exact measures can be compared, but what we do know is that the total participation rate of golf (the number of golfers who played at least one round in a given year), for example, was down from 10.7 percent in 1990 to 8.5 percent in 2013. However, the National Golf Foundation has reported that the number of junior golfers has increased since the 1990s, as has the number of female and beginner golfers. Tennis has also shown a bump in its number of total "play occasions," with frequent players composing most of that group.

In its 2014 State of the Industry report, the Tennis Industry Association (comprising nearly 800 member companies) evaluated the top reasons why players played more tennis as well as what factors may deter players from hitting the courts. The number one reason cited in both of those categories was time, something that's difficult for *any* industry to battle.

Interestingly, the number two reason people gave for successfully making it to the courts was the acquisition of a partner. Likewise, the lack of a partner at the players' skill level was the third most common reason cited for *not* getting out to play tennis.

There is a parallel here with skiing and riding. RRC's extensive research on beginners indicates that "not having anyone to go with" is one of the top reasons that keeps people from participating more often in snowsports.

An interesting article by Pellucid Corporation, a data analysis group, stated that "...golf has experienced a decline in revenues and a bigger decline in participation" ("How Can Golf Learn from Skiing and Tennis Industries?" *Outside the Ropes*, Vol. 13, No. 6, July 2014). Not surprisingly, the article theorizes that the reasons for this trend are



due to changes in demographics, among other factors. Pellucid went on to elucidate that "...the 'baby boom' population bubble was much younger in the 1960s and 1970s, meaning that they gravitated to [skiing and tennis]."

As that group aged they apparently were not fully replaced by younger, incoming golfers, a trend that the golf industry is admirably fighting, as are tennis and skiing.

"Golf relies heavily on introductory programs and can have significant barriers to entry," said NSAA President Michael Berry, noting the cost of equipment and green fees, along with the need for lessons.

To counter that reality the golf industry has been initiating a series of introductory programs, like Get Golf Ready, the PGA's five-lesson curriculum for adults. Starting around \$99, the program is designed to "teach everything you need to play golf in just a few lessons." Get Golf Ready has introduced nearly 360,000 people to golf since its inception six years ago.

The First Tee is a similar initiative that's been in operation for 20 years. An international youth development organization with 17,000 volunteers, First Tee is used in after-school and in-school programs to introduce the game of golf, and has had around 9 million participants since its inception. These programs can help spark the flames of interest in golf and will likely make a significant positive impact into the future in terms of increasing youth participation. That said, there is still the need to invest in equipment.

Tennis has a series of similar programs to help draw new players. The availability of free courts and the smaller initial investment in equipment (a racket, some tennis balls, and a pair of sneakers) makes these programs likely to succeed.

However, remember the Achilles' heel of tennis: the lack of available partners for tennis-hungry participants? This is where much of the Tennis Industry Association's focus has been, with the recent institution of playtennis.com. The website helps match players all over the country with similarly skilled players, and users can also tap into an extensive database to find a court or tennis facility nearby. And a new mobile platform for the website makes finding a partner or even a coach as easy as picking up your cell



phone. The association launched the website with a considerable consumer outreach and marketing campaign, using television, online, print, and social media messaging. The logo is on more than 30 million cans of tennis balls, 1.5 million racquets, and other product packaging.

Considering that 47 percent of all frequent tennis players are over the age of 35, the tennis industry fully realizes that the procurement of a new generation of players is critical to the health of the sport. Another industry initiative, Try Tennis for Free, is a branch of playtennis.com that can help convert first timers without any financial investment at all. Launched in May 2014, the program is offered by tennis facilities and certified teaching pros around the U.S. who have signed on to offer free introductions to tennis to new and returning players. The industry's research shows that 65 percent of players who begin tennis in introductory programming continue with the sport. In that respect, getting consumers to try the sport is half the battle.

Clearly, skiing/snowboarding has a similar challenge, as with an aging population of participants we are seeing those customers fading out of the sport. The reality of the population trend is that those aging skiers and riders are taking their wealth with them into their retirement years, leaving our industry to rely on younger skiers/riders to fill in the gaps, *and* promote growth and more significant conversion to lifetime snowsports enthusiasts. With the knowledge that the Millennial and Generation X populations are the critical target market, we have to make sure we're meeting their needs, and doing so at an affordable pricepoint.

"In terms of our beginner conversion rate of 17 percent, it's the highest it's ever been," ♦



said Nate Fristoe of RRC. This boom may be due in part to the recent development of Terrain Based Learning™ and similar programs that have made a significant impact in beginner satisfaction scores, Fristoe noted.

He went on to say, however, that “our lackluster performance converting Millennial component population is one of our biggest problems. Their loyalty to the sport is variable, a factor we are continuing to try to understand.”

Meeting the needs of the younger population while still catering to select groups—such as the influential female contingency—appears to be the lynchpin for growth in our industry. Dave Belin, RRC’s director of consulting services, stated that “time spent, cost, and distance to ski areas are the top three reasons why people [may elope from skiing and riding].” By focusing on those measures and others, growth is well within our grasp.

Michael Berry echoed these acknowledgements, stating that “the utilization of a season and buddy



help,” he added, citing Cascade Mountain in Wisconsin as another example of an area that seems to be doing this the right way, and reaping dividends.

Improving accessibility to skiing/boarding partners is a potential area of improvement in the industry. Bear in mind that skiing conversion efforts (as with tennis) can be easily thwarted if individuals don’t have someone to share the experience with, be it a friend, family member, or fellow enthusiast. Increased availability of public forums or even ski area-organized skier/snowboarder groups of similar skill levels can potentially do for snowsports what playtennis.com has done for that sport.

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pass is a powerful way to draw new friends to the sport.” He went on to say that “we need to make every effort to ensure that those who have the skill set come back more than a few times. That is a key to success. Over that last two decades the commitment the industry has made to the entire experience has never been better. From food service to the uphill and downhill, by not resting on our laurels, we can make even more improvements.”

One challenge to having new skiers and riders enjoy the sport is getting them on the snow in an easy, efficient manner. Considering the fact that most first-timers rent equipment, streamlining the rental process has been found to improve satisfaction scores, Belin said. “Simple functions like placing the rental shop next to the instruction center has been shown to make a difference,” he said.

Belin also named Mountain Creek Resort in New Jersey as an innovative area that has a system by which your rental gear is transported to the snow for you, taking one more hassle out of the experience. “Reducing line length time and allowing the opportunity to pre-register to streamline the rental process can reduce time spent at the rental center and can

Belin stated that “focusing on groups of like-minded people” has made a positive difference in our business. “For example women’s-specific programs, with female instructors—perhaps serving a nice lunch or having the program sponsored by women’s gear companies—can make for a more positive experience,” he said. “There are many examples of how well this has worked in the industry.”

Skiing and riding are decisively social sports. They can change us and enrich our lives. “Time well spent with friends and family is the overarching theme with skiing and snowboarding,” Berry said.

And he’s right. People come to our slopes for the experience, the thrill, and the camaraderie. They need, expect, and deserve to have their preferences met with aplomb. Whether it is providing teen programs or group events, streamlining the consumer’s experience, or simply making the experience more affordable upon entry, we have the tools in place to execute the changes that are needed to launch skiing into the next decade as what it is: the greatest sport. ■

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