

FRESH START: IS THIS THE NEW GOLDEN AGE OF SNOWSPORTS INSTRUCTION?

Millennials, the Model for Growth, and an Increasing Focus on Beginners Could Give Snow Pros the Tools to Increase Conversion
BY PETER KRAY

Following the second best season for skier and snowboarder visits in the history of U.S. snowsports—with the *Kottke National End of Season Survey* reporting 59.7 million skier/snowboarder visits last year, only 1.2 percent off the all time record of 60.5 million visits set in 2007–08—it may seem as if ski and snowboard areas really have weather and recession-proofed their operations.

“It was kind of a stealth season in the way that the preliminary results turned out,” said Nolan Rosall, of RRC Associates. That firm produces the *Kottke Survey* for the National Ski Areas Association (NSAA), and released the findings in May at that association’s annual convention and trade show. “The ability of the industry to perform well in a difficult economy and without the catalyst of exceptional snow points to the underlying enthusiasm of snowsports participants and the resilience of their participation in a suboptimal environment,” Rosall said.

To add to the optimism, it wasn't just pass holders and diehards bucking the economic downturn and quirky El Niño snowfall patterns. Rosall also reported that not only did every region (except the Northeast), see substantial gains in skier visits, but lesson volume also increased by 9.2 percent, according to a survey conducted across a sample of 84 unnamed resorts in the U.S. Those same resorts only saw a 3.2 percent increase in visitation, which equates to a 5.8 percent increase in visitor lesson volume.

"These findings suggest an increased willingness of visitors to make ancillary purchases in the 2009–10 season, in contrast to sharp cutbacks in the 2008–09 season in response to the recession," the *Kottke Survey* states. "The results are also clearly positive for the long-term health of the industry."

for actually getting to a mountain. Even more important is the fact that of those people who are inspired enough to try snowsports, after that first day only a fraction return.

HALF FULL VS. HALF EMPTY

In a conversation for the Fall 2010 edition of *32 Degrees*, regarding how the rise of rocker ski and snowboard technology could and should increase snowsports participation just by making it easier to learn, Mike Porter made an interesting observation about future generations. He said, "From what I'm seeing, kids' ski schools are growing."

Porter, the former director of the Vail and Beaver Creek Ski Schools, and a former coach of the PSIA Alpine Team, is also a keen observer of America's snowsports generations.

He said, proportionally, Gen X'ers are out-skiing Baby Boomers as an overall percentage of their demographic. Gen X is just a much smaller generation. If that proportionality holds, Porter theorizes, Gen Y and Gen Z really should provide a significant uptick to snowsports participation.

"What isn't helping conversion," Porter said, "is that a lot of the best terrain for beginner slopes have hotels and condos on them."

History appears to support Porter's theory. Kelly Davis, director of research for SnowSports Industries America (SIA) said, "A theory of consistency might be a more accurate term." Davis said that income and education remain her most consistent indicators of who will ski and snowboard, and that's been proven over

Vikki Fairbank, Jimmy Peak Mountain Resort

Add in the fact that the absolutely ginormous Generation Y (individuals born after 1980), or Millennials—estimated at between 70 to 100 million strong depending on the ongoing impact of immigration—are beginning to make their on-snow presence felt, while the kids that will make up Gen Z (individuals born after 1991) are still being born, and it would be easy to just hit auto-pilot and wait for the new skiers and snowboarders to keep rolling in.

But some very dark clouds remain on the horizon, such as the accelerating loss on the slopes of the Baby Boomers (the generation of Americans born during the Post WWII "Baby Boom" that lasted into the early 1960s). And the fact that their grandkids and great-grandkids—those multitudes that make up Gen Y and Gen Z—have an entire Internet's worth of competing entertainment and networking options. More racially diverse than any other generation in America's history, they have fewer and fewer nearby feeder hills to quickly introduce them to snowsports (see <http://www.nsa.org/nsaa/press/industryStats.asp>), and diminishing options

"It's like there's a group of people who, no matter what, will be going downhill fast on something."—Kelly Davis, director of research for SnowSports Industries America

time. In research over the past 20 years, she said those two factors have been pretty much "color blind."

"The population of who skis and snowboards has stayed really stable," said Davis. "Snowboarding only added, at best, 1 million participants to the market, and everyone else seems to have been pre-destined to be it there. It was just a matter of which equipment they would choose to be on. It's like there's a group of people who, no matter what, will be going downhill fast on something."

According to the *SIA Snow Sport Participation 2010* study, the total number of individual participants in all six snowsport disciplines—alpine skiing, snowboarding, cross-country skiing, snowshoeing, freestyle skiing, and telemark skiing—is 20.5 million, or 7.3 percent of the total U.S. population

(A survey from the National Sporting Goods Association, measuring only downhill skiers from 2000 to 2009, put that number at between 2.6 and 3.0 percent of the total population). The SIA study found that even though nearly 60 percent of America's skiers and snowboarders are concentrated in 10 states, they still managed to grow alpine skiing participation by 5.5 percent and snowboard participation by 3.7 percent from the 2007–08 to 2008–09 seasons.

In projection models based on those findings, Davis said that all other things being equal, the population boom could correspond to as much as a 30-percent increase in snowsports participants over the next 40 years, “barring major social, environmental, or economic disruption,” she said.

Not so fast say the powers that be at the National Ski Areas Association. Why? Because out of all those potential new skiers and snowboarders that actually do give snow sliding a shot, very few of them stick around.

“Very little progress has been made in increasing the participant base,” according to NSAA’s own *2009 Growth Model*, which reports overall annual growth in skiing and snowboarding specifically at only 1.2 percent from 1997–98 to 2007–08. The problem, according to the findings in the *Growth Model*, is that “We’ve made very small gains in conversion and experienced significant declines (in) core retention.” Particularly in the beginner conversion rate, which only increased from 15 percent to 16.7 percent in that same period of time.

In the corresponding worst-case scenario, the accelerating dropout of aging skiers, erosion of retention, and lack of beginner conversion will result in an annual 2.5 percent decline in the on-snow population. If that were to occur, by the 2020–21 season—only one decade away—projected skier/snowboarder visits would drop to 41.4 million.

Unless, of course, ski areas and their on-staff snow pros can help us keep the riders we have, and turn even more first-timers onto the fun. From the *Beginner’s Cookbook* (a list of 10 fundamentals for converting beginners to full-timers)

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to the overall strategy laid out in NSAA’s *Model for Growth* NSAA President Michael Berry is adamant that ski resort operators need to get intimately involved in the long-range success of their ski and snowboard instruction programs.

As he said at that Orlando convention in May, “For the decision makers at ski areas across the country, this has got to be priority number one.”

THE FRONTLINES OF CONVERSION

At areas where management, snowsports schools, and even the grooming and equipment rental staff have teamed up to create a better beginner product, the results have been startling. Massachusetts’ Jiminy Peak, Vermont’s Stowe,

Q & A WITH NSAA PRESIDENT MICHAEL BERRY



Courtesy of NSAA

It was May of 2000 when National Ski Areas Association President Michael Berry introduced the *Model for Growth*, a critical analysis of the many challenges facing the future of snowsports, especially the ability to maintain a consistent participation rate. Now, a decade later, Berry says converting new skiers and snowboarders remains the most critical issue, with snow pros on the frontline in helping affect the industry’s long-term success.

PSIA-AASI: As far as the sheer number of future participants in snowsports is concerned, how high are the stakes right now?

MICHAEL BERRY: Fostering participation by kids and teens remains critical to the long-term health of the industry. Kids aged 17 and under have represented about 30-percent of our annual skier/snowboarder visits for the past four seasons, so this is at least some indication that on the national level, we’re at least holding our ground in attracting youth. However, some regions have experienced slight decreases in

youth participation, which is an area of concern.

Nevertheless, within the past three seasons the industry has had two of its best seasons on record, including the all-time high of 60.5 million visit set during the 2007–08 season and last season was the second best season on record at 59.8 million skier/snowboarder visits. Much of our recent success is the result of Baby Boomers remaining active in their older years, and also due to increased frequency of our core participants—those die-hard skiers and riders who own season passes. Yet as we look toward the future, it’s apparent that a redoubled focus on trial and conversion is essential, particularly as Boomers and core participants drop out.

PSIA-AASI: What’s working? Who is creating the Best Practices for getting and keeping more people on the hill?

MICHAEL BERRY: Ski areas are acutely aware of the importance of creating loyalty

Indiana's Perfect North Slopes, Alaska's Eaglecrest, California's Northstar-at-Tahoe, and Utah's Park City, just to name a handful, have all reaped the reward of putting proven, experienced people in charge of their beginner programs.

"It's a resort-wide effort," said Vikki Fairbank, supervisor of GET Skiing at Jiminy Peak Mountain Resort. "All of this has to start from the top and work its way down. If you don't have a CEO or president or general manager supporting this, then you won't have the staff to make it happen."

Fairbank said at Jiminy a mix of often seasoned, designated beginner instructors, a segregated teaching center, and a first-time experience that starts with those instructors meeting their students at the rental shop has resulted in the area's conversion nearly doubling in the past season. From 2008-09 to 2009-10, Jiminy's first-time conversion rate jumped from 15.8 percent to 27 percent for skiers, and from 8 percent to 14 percent for snowboarders.

"You have to identify the instructors who really want to teach beginners, because they have to have a passion for what they're doing," said Fairbank. "We can do a lot to get people here, but if they get here and have a bad experience, then our chance is gone."

Incentives, including cash bonuses for instructors who generate return visits and discounted tickets and rentals for the consumers taking a second or third lesson, are the norm in successful beginner operations. At Park City, class size is also an important part of the equation.

"One of the things the *Model for Growth* has shown us is

that we can't do things the way we always have and expect to be successful in the long run," said Tom Pettigrew, Park City director of Skier Service and also of the Park City Ski and Snowboard School. "We looked at our kids' classes, specifically our beginners' classes, and they were just too large with up to nine or 12 kids in each class. We decided to limit those classes to five kids or less, so that the kids would be comfortable, and our instructors could focus on teaching instead of counting to make sure that they've got everyone."

What worked for beginning kids, the Signature 5 Pro-

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gram, worked so well that Park City began to offer maximum class sizes of five students to all ages and abilities. Pettigrew said that despite some initial concerns over staffing and scheduling, the five-person class has become an integral part of Park City's snowsports learning program.

"I think five is a really nice number in terms of bonding with the other people in your class, and getting personalized instruction. Having four six-person detachable chairs also means that the lesson can continue on the lift," Pettigrew said. "And with the proliferation of shape skis and the work we have done with Burton and their updated LTR (Learn to Ride) program over time, we've really been able to focus on increasing conversion and retention."

Shaun Cattanaach, Burton Snowboards resort programs manager, said it is that exact management to instructor to

among their skiing and riding guests, and there is a lot of ingenuity out there on how to go about creating that reality. But the fact remains, there is no one-size-fits-all solution. Each area is as unique as the people who run them, so what works at one ski area might be a colossal failure at another. The ski area operators know what works best within their operation.

One thing that we at NSAA encourage is information sharing among our member resorts, either through Conversion Case Studies that we publish in the *NSAA Journal*, or through various sessions that we host at our Winter Conferences and National Conventions. NSAA members can access our Conversion Case Studies on the member side of our website (www.nsaa.org) to gain some ideas of what's worked for other resorts.

PSIA-AASI: How does Learn to Ski & Snowboard Month add to the equation?

MICHAEL BERRY: Learn to Ski & Snowboard Month aligns perfectly with the industry's goals of attracting and retaining new skiers and snowboarders. This is a

grassroots initiative that was borne through the collaborative efforts of ski areas and state and regional ski associations, and we applaud their efforts. (See National Campaign's message: Take a Lesson on page 32.)

Last year, more than 30,000 lessons were given as part of this initiative, and we're looking for those numbers to grow this season as we celebrate Learn to Ski and Snowboard Month 2011.*

PSIA-AASI: How do snowsports instructors and resort management work together to build a common future, as well as immediate returns from their snowsports schools?

MICHAEL BERRY: Certainly ski and snowboard schools are a main focal point when speaking of growing participation, and repeat visitation. Obviously the interaction and overall experience our skiing and riding guests have with ski and snowboard instructors are key toward realizing this goal.

Having said that, it's also clear that every ski area department—whether it's the parking lot attendants, to snowmaking and grooming,

to food and beverage, and even the cleanliness of the bathrooms—can affect a guest's overall experience. A lousy experience in the parking lot can sabotage the guest experience well before that guest ever makes it to the ski or snowboard lesson, so ski area operators are looking to all departments to deliver.

Nevertheless, because of the nature and duration of the guest interaction, resort operators expect more from their ski and snowboard schools, and instructors. They expect them to make the sale.

Ski area operators are looking for their instructors to not only deliver an exceptional lesson experience, but to develop broader connections with their students to help drive repeat visitation and ultimately turn those students into lifelong skier and snowboarders that will continue to visit that resort, or any resort, for many seasons to come.

Peter Kray

*PSIA-AASI efforts enabled development of promotional materials for Learn to Ski and Snowboard Month.

NATIONAL CAMPAIGN'S MESSAGE: 'TAKE A LESSON'

Call it the Got Milk? campaign for snowsports. With the tagline, Humans Were Never Meant to Hibernate, Learn to Ski and Snowboard Month (LSSM), is a national public relations effort aimed at dramatically increasing the number of people, and lessons, on the slopes.

It absolutely is something that is designed to drive more people to PSIA-AASI, said LSSM Director Mary Jo Tarallo. We are expecting to reach as many never-ever skiers and snowboarders who need beginner lessons as we are expecting to reach lapsed skiers and snowboarders who could definitely use a refresher on the latest in equipment, and technique."

Encompassing the entire month of January, LSSM originally debuted in 2007. But it was last season that the initiative achieved its greatest success. In January 2010, more than 300 ski resorts and nordic centers in 23 states participated, and, Tarallo reports, more than 30,000 lessons could be directly tracked as occurring as the result of the formerly titled Learn a Snow Sport Month.

By building on that success, and increasing cross-promotional opportunities, Tarallo hopes that this season will produce even better results. It really is supposed to be a grassroots effort, which means that it is up to everybody and in everybody's best interest to help get the word out, Tarallo said. I look at it like a potluck, where if all the resorts and instructors and equipment manufacturers bring a part, then it's much more likely to be a big success.

Across the country, regional ski area associations are stepping up to increase the impact. In combination with its 5th grade passport program, in January 2011 Colorado Ski Country USA will offer a complimentary ski lesson and rental equipment to any 5th grader who is new to the sport. Maine, New Hampshire, and Vermont are offering several free-ski packages, as well as deals that are available in all three states.

Jen Butson, director of public affairs for Ski Vermont, said that making it as easy as possible to get on the snow is the mantra in the Green Mountain State. Ski Vermont offers a variety of beginner programs so that there are no excuses or barriers, Butson said. This season, that includes a free week lesson and lift ticket promotion to kick off the month, as well as Bring a Friend, Two for One, and Road Trip promotions, which include a specially priced lift, lesson, and rental package at Mount Snow, Okemo, and Stratton.

LSSM spells out in their marketing materials that, New participants are urged to take beginner lessons from a professional instructor as a way to learn best practices. And that, Current participants are encouraged to hone their skills with advanced lessons or take up an alternative snowsport. But that doesn't guarantee that ski schools will reap a new bumper crop of January lessons.

People have to take charge at their own mountains, and use the PR materials we're providing them to tailor that to exactly how their mountain wants to make an opportunity out of this, Tarallo said. We're helping provide the tools, but it's up to all of us to help make this work.

For more on the program, special regional initiatives, and materials you can use to promote your own snowsports school, go to www.skiandsnowboardmonth.org.

Peter Kray



student to gear relationship that is going to spell success—or failure—for our industry on the mountain.

"Everyone needs to remember that we're offering a leisure activity," said Cattnach. "You don't need skiing or snowboarding to survive. It's not food. It's not water. A pair of skis is not going to shelter you from a storm. And if we're not giving people real measurable returns on their investment in our sport, then they're just as likely to go golfing, or to Disneyland."

But while Burton can provide the gear and help with the on-hill expertise, Cattnach said it's the changing mindset at resorts that will have the longest lasting impact on who is on the slopes in the years to come.

"It's too easy for a resort to look at a ski school as a short-term profit center, and to try and get as much out of our guests—whether that's selling them a condo or an extra night's stay—than

What worked for beginning kids, the Signature 5 Program, worked so well that the Park City Ski and Snowboard School began to offer maximum class sizes of five students to all ages and abilities.

it is to see our guests as a long-term investment that will benefit everyone," Cattnach said. "But it is the folks who are doing everything they can to make sure that first resort experience is the absolute best experience who are going to see the best payoff in the long run."

WHERE EDGE MEETS SNOW

Through it all, it's the snow pro who is always going to have the biggest impact on who returns to skiing and

snowboarding after that first, second, or even third lesson. And with an entire association built around meeting each student's individual needs, the challenge for the future is an especially welcome one.

"What I'm most fired up about right now is the idea of how we can incorporate freestyle into beginner lessons," said Ben Roberts, PSIA-AASI education manager. "Whether it's a little 180 on the flats, or a little jump, I think the ability to understand exactly what our guests are coming to us for, and being able to provide as much of that experience as their ability allows is exciting."

Mixing methodology with immediate results, and practical pieces of the puzzle with enjoyment are all key to perfecting the blend between the technical and mental aspects of instruction.

"I think the biggest question at the end of the day is if they had fun," Roberts said. "That comes from listening and communicating with students, and meeting people where they are coming from. Are you helping them find joy, or just showing them yours?"

Which, despite the gravity of the discussion, is the real reward of successful ski and snowboard instruction—the idea that every great class not only produces a new customer, but also a new source of enjoyment and freedom for someone, and maybe even a brand-new friend.

"I don't think you can take any customer for granted," said Mark Dorsey, PSIA-AASI's executive director. "With four

to five generations on snow right now, there have never been more diverse needs to be met, so many definitions of a great experience on snow. Our ongoing challenge is to find out what attracts them to winter sports, and what keeps them."

Finding the answer to that question is the beauty at the beginning of every lesson. How do we make this sport something that they always want to do? How do we get more people psyched about snowsports? Or, as Dorsey said, "make the experience awesome?"

"We start by talking with each student about what they are going to be in for and check that against why they came, we deliver perfectly, and we thank them for coming and invite them to return. If we do that, then we keep guests coming back," said Dorsey. "And with all these opportunities occurring right now, it's more important than ever that our members are the focal point, because they are the best possible ambassadors for the sport, and for each individual hill and mountain." ❄️

Peter Kray is the special projects editor for 32 Degrees, focusing on emerging snowsports trends, on-snow innovations, and the PSIA-AASI 50/50 Project. Kray skis, telemarks, and snowboards out of Santa Fe, New Mexico, and is the founder of Shred White and Blue (www.shredwhiteandblue.com), a media and apparel company celebrating American boardsports.

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