

July 4, 2013 11:30 a.m. – 1:30 p.m. E.S.T



CANADIAN SKI COUNCIL

MARKETING AND RESEARCH

COMMITTEE MEETING

	Agenda		
1.	11:30-11:35	Call to Order, Approval of Agenda, Chair's Opening Remarks	Paul Pinchbeck
2.	11:35-11:45	Skier Rider Development Program- Brief Results a) Grade 4 & 5 SnowPass program i) Total applications received for 2012/13 ii) End of season research	Patrick Arkeveld & Jessica Weis
		a) 2013/14 SnowPass program	Patrick Arkeveld
3.	11:55-12:05	a) Discover Skiing/Snowboarding i) End of season results	Laura Rice
4.	12:05- 12:15	Canadian Ski Council Media Campaign - Brief Results	Patrick Arkeveld & Natalie Dalzell
5.	12:15-12:25	Skier Rider Development Pledge Form Agreements	Patrick Arkeveld
6.	12:25-1:25	CSC Internet Marketing Strategy – Next Steps and Recommendations for 2013/14	Paul Pinchbeck & Laura Rice
7.	1:15-1:25	2013 Toronto Snow Show – Brief Update	Paul Pinchbeck & Patrick Arkeveld
8.	1:25-1:30	Time and Place of Next Meeting	Paul Pinchbeck
9.	1:30	Meeting adjournment	Paul Pinchbeck



2. Skier Rider Development Programs

2012/13 SnowPass Results

www.skicanada.org



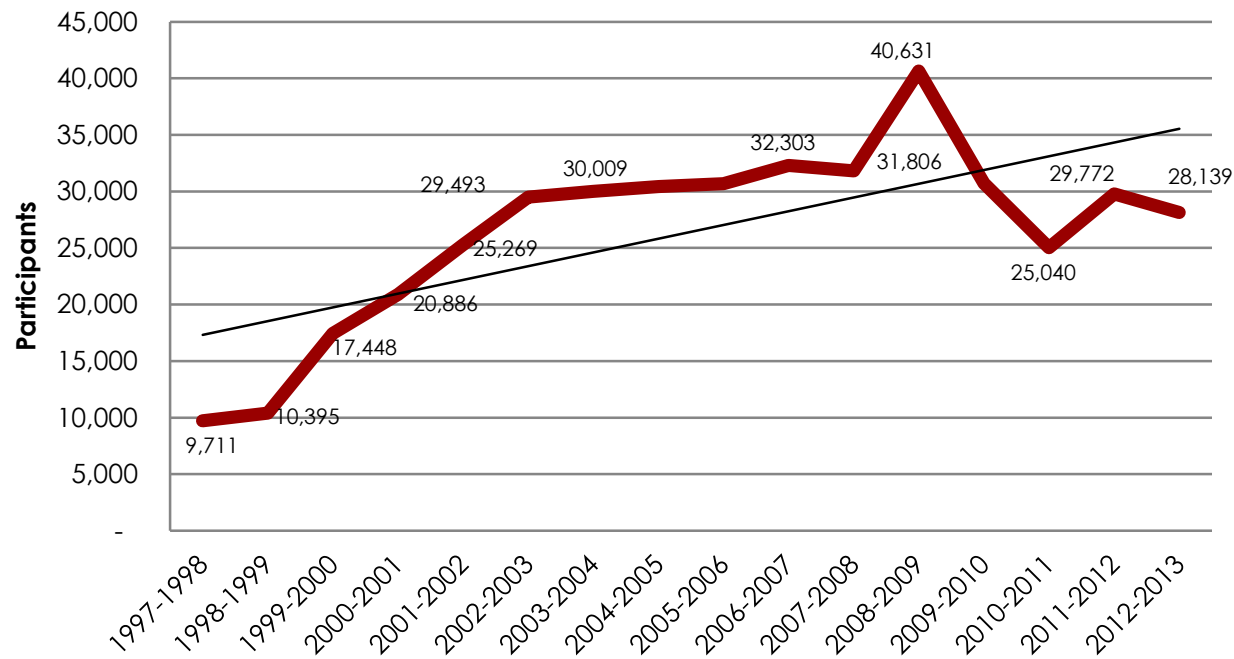
Preliminary Results

	Canada	2011/12
Areas Participating	154	156
Applicants	28,139	29,772
No prior experience	18%	17%
Used the Pass 1+ times	77%	78%
Visits	62,999	57,993



Historical Participation

Historical SnowPass Participation



Down \approx 10% in Ontario, primarily due to lack of school participation

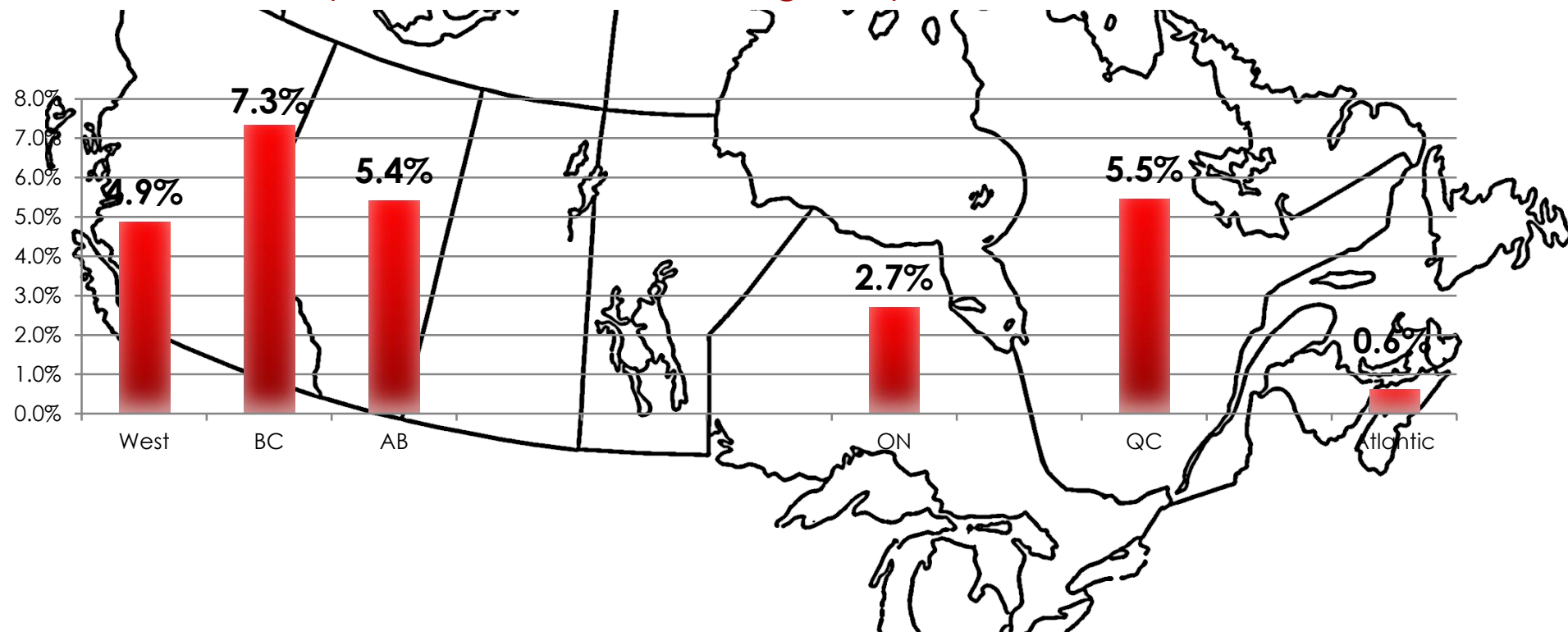
- Need to better understand what the target participation number is
- Need to understand the true opportunity
- Will greater advertising truly raise participation levels?
- Penetration #'s have only ever looked at the one year



Market Penetration

3.9% of 9-10 year olds applied for a SnowPass™ this season.

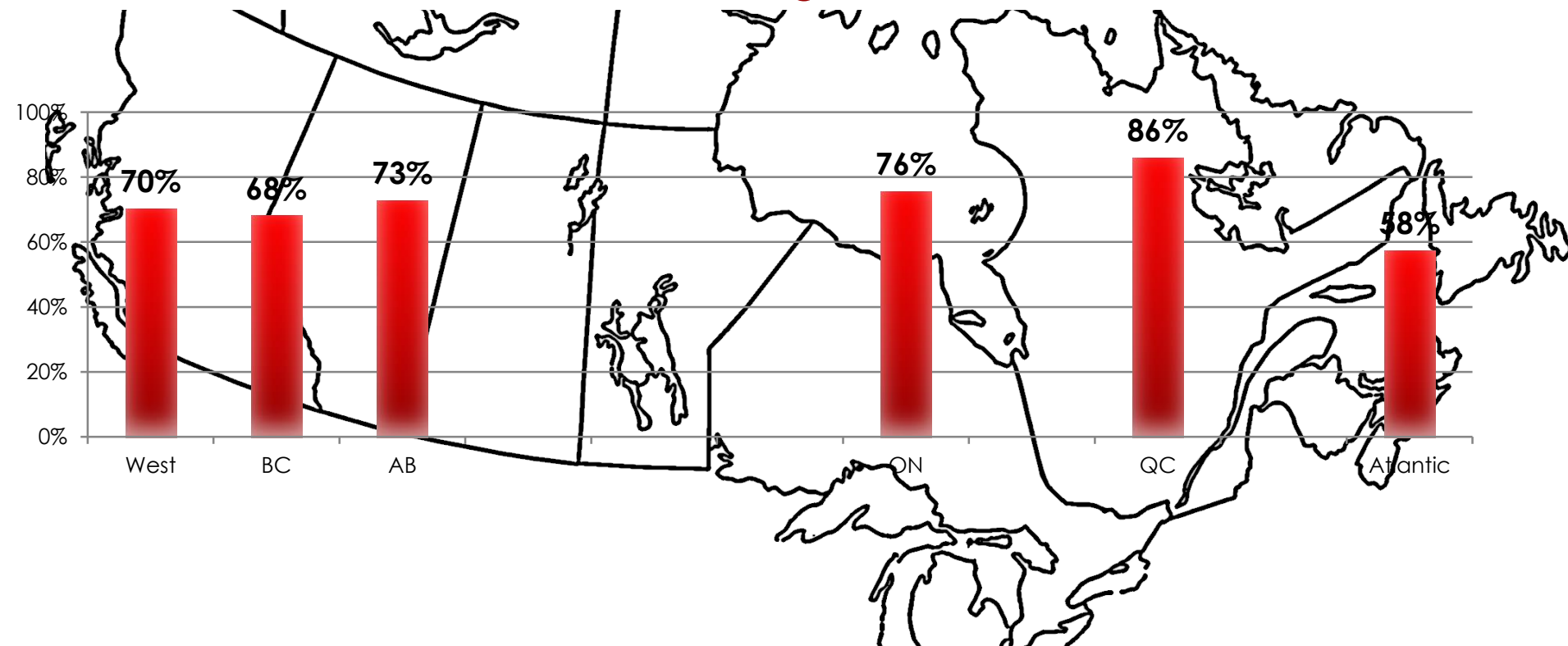
Of the main provinces BC has the highest penetration, Ontario the lowest





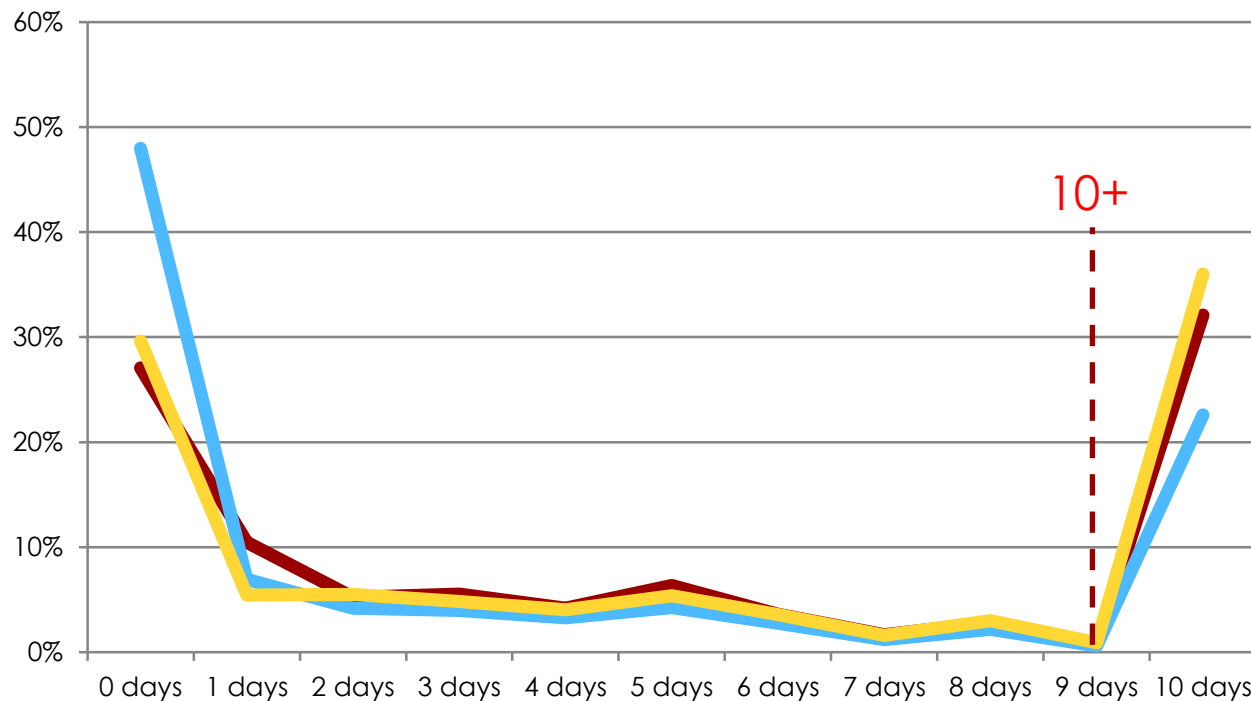
Activation Rate

77% of applicants used their SnowPass at least once
Activation was highest in Quebec





Participant Analysis



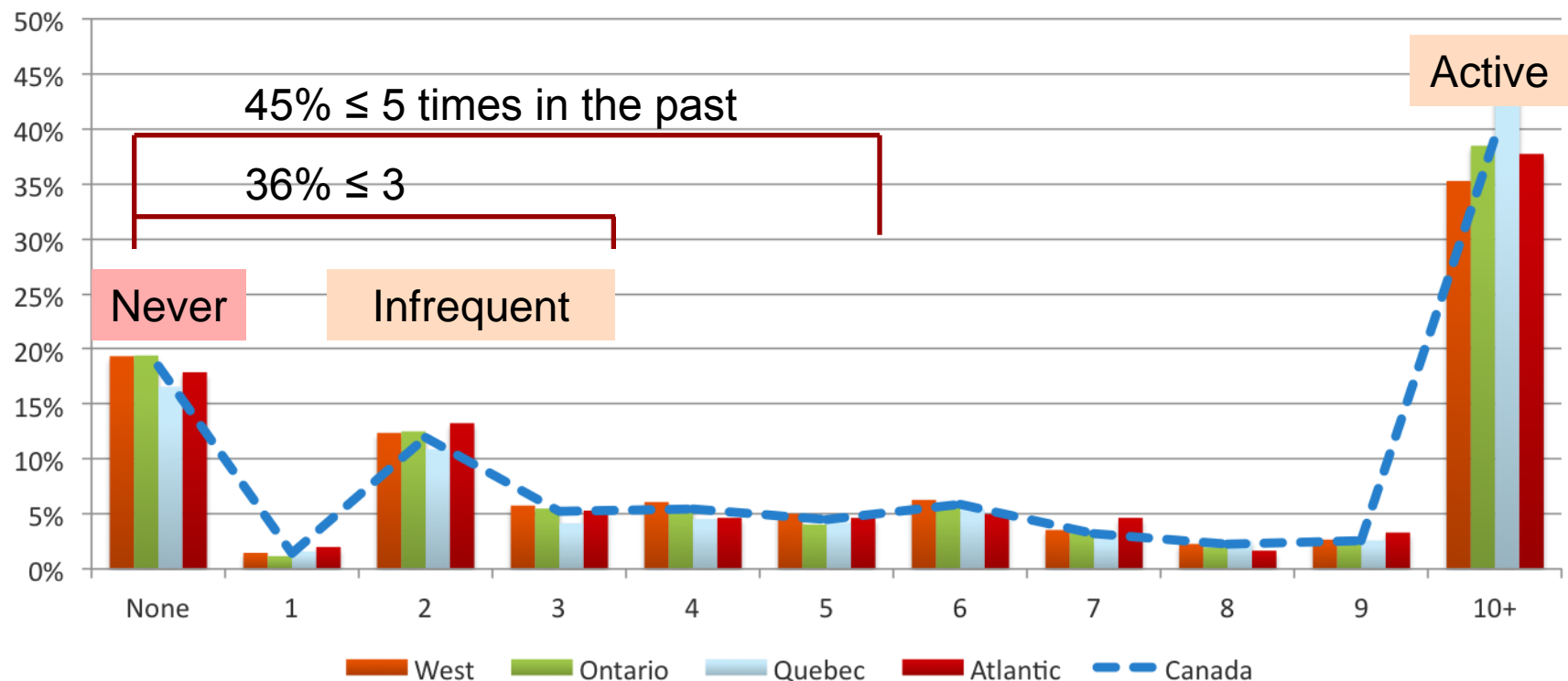
2008/09  2009/10  2010/11 

- This 'trend' is consistent over the past 3 years
- Average days skied 2008/09 = 4.99
- Average days skied 2009/10 = 3.36
- Average days skied 2010/11 = 4.71



Prior Experience

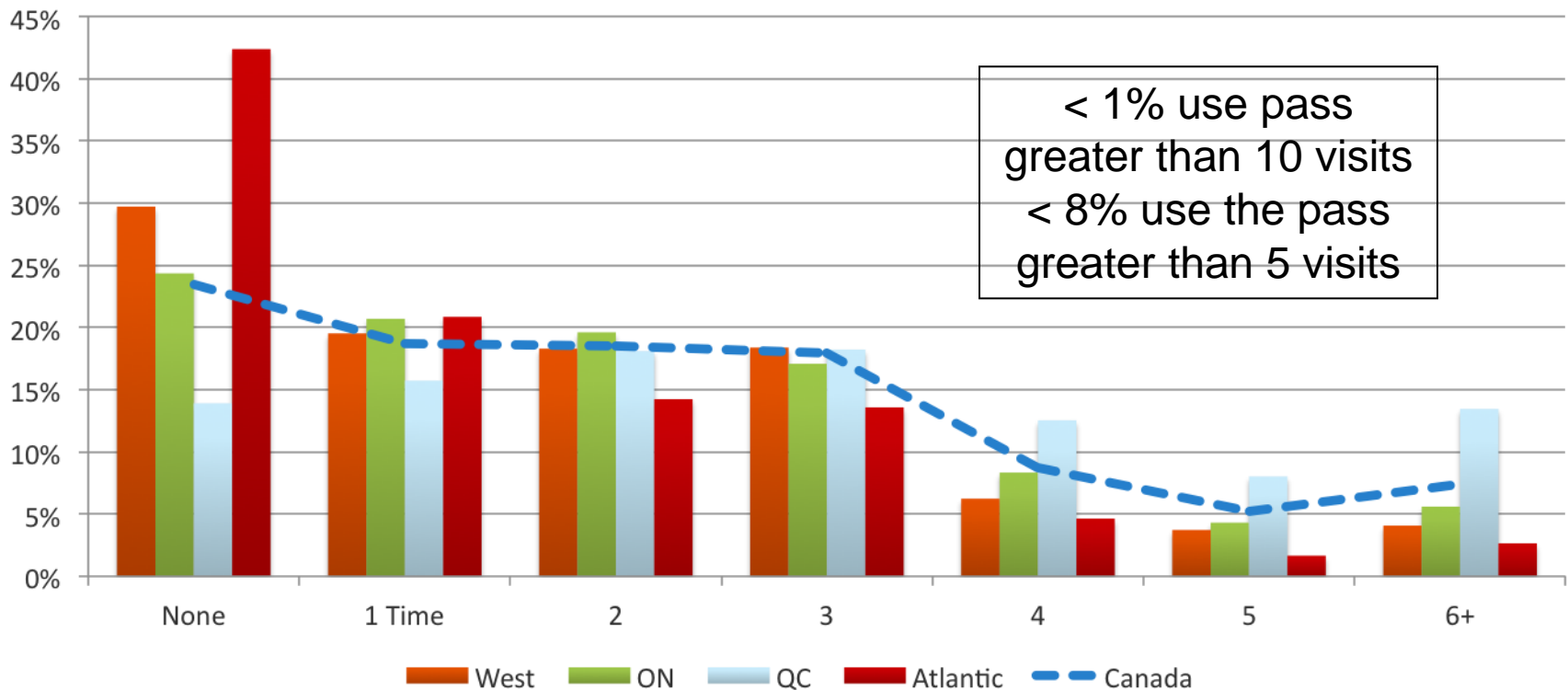
Almost one in five applicants were new to snowsports, a similar share had tried skiing or snowboarding and were infrequent participants





Actual Usage

While a small share of applicants used the SnowPass more than 5 times, this was driven by active pass holders in Quebec





GRADE 4 & 5
SNOW PASS
snowpass.ca

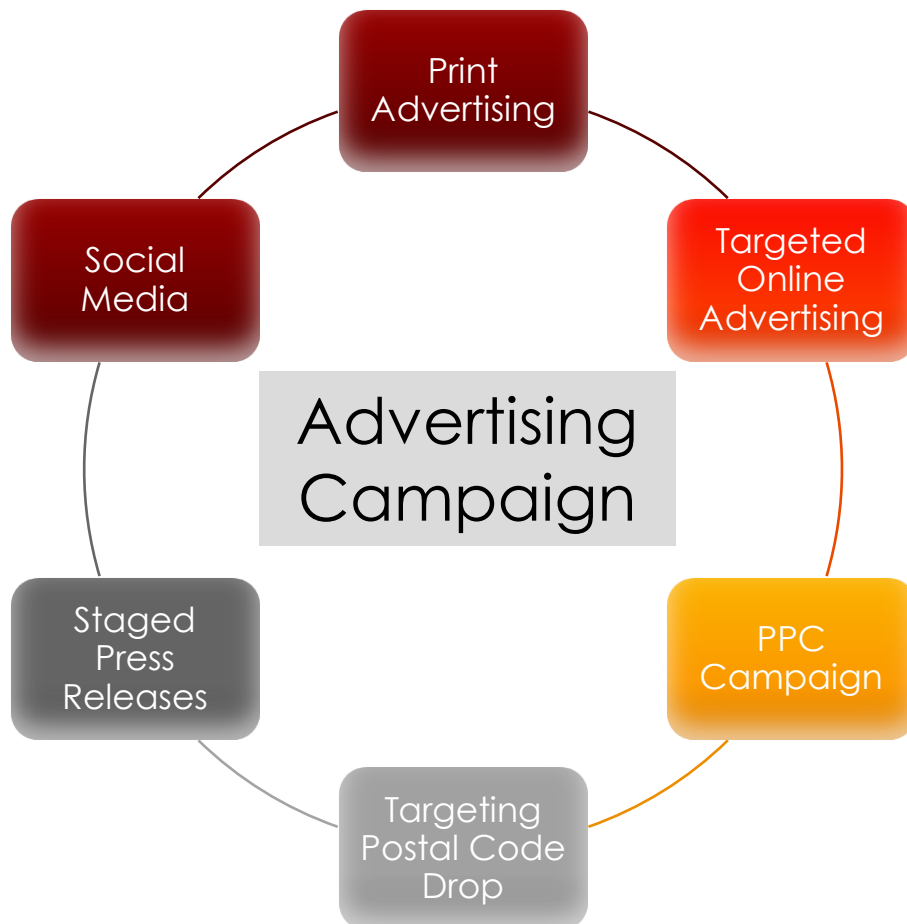
SKI & SNOWBOARD
ALL ACROSS CANADA
FOR FREE*

*\$2000 shipping and handling fee

Marketing Strategy



Marketing Strategy



- First time the CSC has actively advertised the program
- Remains a sensitive issue for many ski areas
- Recent research allowed us to work from the same set of assumptions
- Additional funds raised from price increase allocated to advertising the program
- Results include pent up demand from families with children under the age of 9



Print Media

- National Post - Two ½ page ads – Saturday Edition (Dec 1/8)
- Enroute Magazine – Full page ad – December Issue
- LEARN Magazine – 1/6 page ad – Winter 2012
- Professionally Speaking – 1/6 page ad – Winter 2012
- EPOCH Times – Three ¼ page ads – Saturday Edition
- EPOCH Times – Holiday Gift Guide - November
- Sport Chek Flyer – Two Issues - Nov 28 - Dec 10
- Ontario Winter Guide – Full page ad – Winter 2012
- Canadian Forces Appreciation Program – Winter 2012/13

Total Circulation > 10,000,000



Editorial

- 8 Press releases issued to over 12,000 media contacts YTD
- Highlighted in 98 publications as of March 7, 2013
- Series of radio interviews across the country as a result
- Total circulation of 8,889,629 vs. 1,160,480 in total for 2011/12
- Very low cost method of raising awareness
- Picked up during March Break segment on Breakfast Television - Toronto



Pay Per Click

- Google ad words campaign (Oct – Feb)
- 2,502 Clicks – 1,112,983 Impressions as of April 1, 2013
- Two campaigns:
 - Kids learn to ski ≈1,500 clicks, 950,000 impressions
 - Kids active Living ≈1,000 clicks, 160,000 impressions

Grade 4&5's Ski for Free

Resorts across Canada come together
to help kids be active in winter

www.snowpass.ca

Grade 4&5's Ski for Free

Kids 9 or 10 years old ski for free
at over 150 resorts across Canada

www.snowpass.ca



Targeted Online Advertising

- Pilot project initially launched in Quebec only
- Later followed up with a campaign in Ontario due to school issues
- Behaviour targeting based upon previous browsing history
- Banners went through a channel of >400 websites such as: aircanada.ca, lactualite.ca, chatelaine.com etc.
- When browsing the web, the site will put a cookie on a browser, which populates as one surfs
- Achieved 16,000 clicks and 19,764,059 impressions during a 1 month period of Quebec campaign
- Achieved 10,529 clicks and 5,602,619 impressions during 3 week period of Ontario campaign



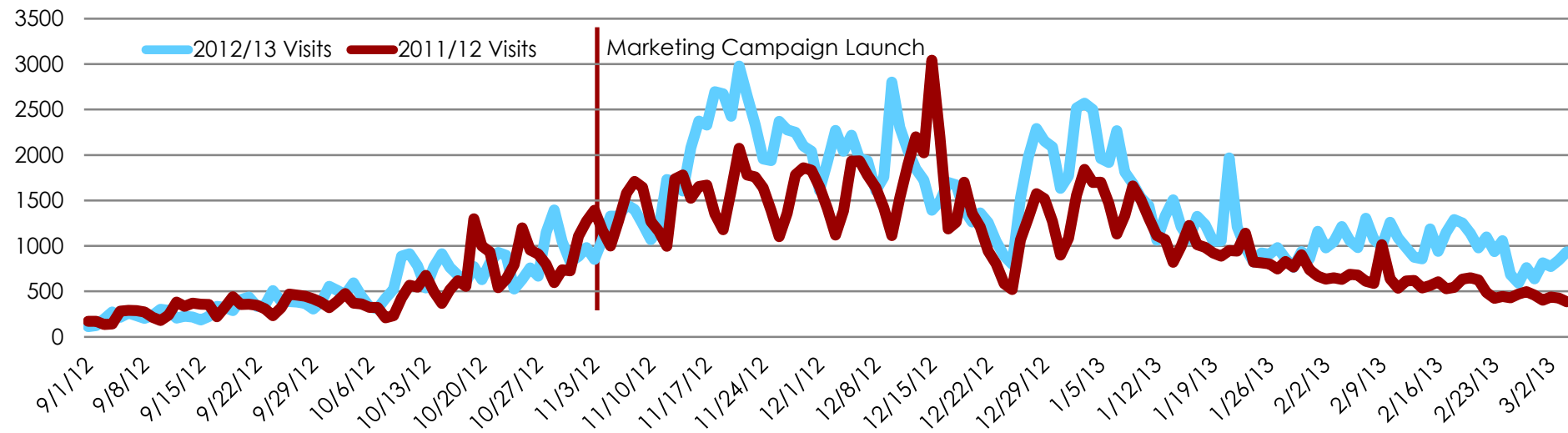
Postal Code Drop

- Direct mail piece sent to 205,000 HHS across Canada
- Based upon the following criteria:
 - 100% of HHS within our two target groups
 - No more than 5% of households participated previously
 - A high % of children within our target age demographic
 - Within 1.5 hours of a ski area
- Results will be carefully evaluated based upon analysis of application postal codes to determine effectiveness of campaign



Marketing Strategy - Impact

Total Site Visits



- ≈ 26% increase in web traffic since launch of advertising campaign
- ≈ 215,999 site visits since September 1st, 2012 (up until March 1st, 2013)
- Averaging approximately 1700 visits/day during winter months
- Average visit duration of 4:08 min (excluding application process)
- Approximately 67% of visits are unique (72% on passpsortdeneiges.ca)



Marketing Impact

There are some differences geographically – likely a result of local marketing efforts

	Canada	West	BC	AB	ON	QC	Atlantic
School	54%	116	118	116	82	96	66
Friends/Family	33%	80	81	77	120	107	123
Web/Social	4%	78	70	83	112	116	151
Retail	3%	88	77	97	120	94	224
Ski Area	2%	95	63	126	108	92	301
Print	1%	37	24	54	179	108	215
Event	0%	60	39	91	216	51	0
Other	3%	94	97	88	127	84	90



Marketing Impact

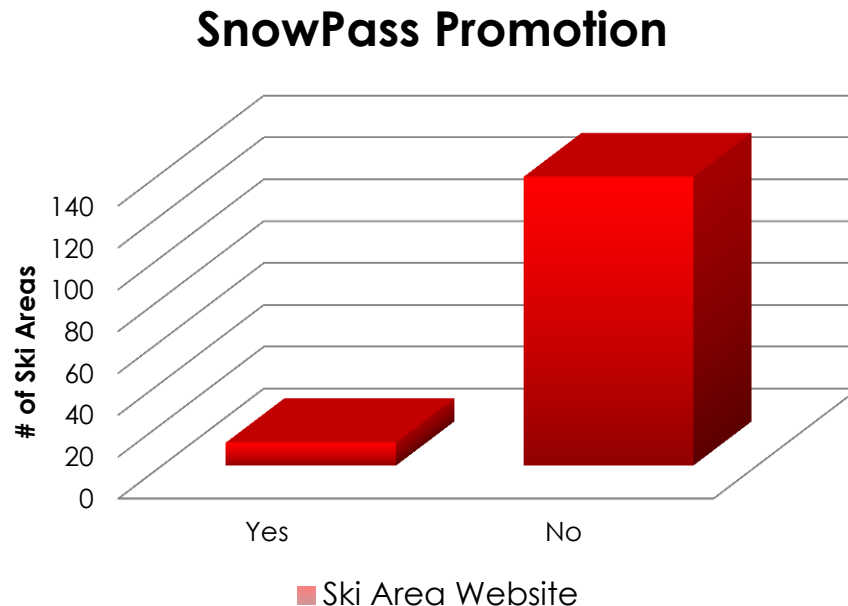
There were also some differences in the postal walk assessment with higher take ups in Ontario and Alberta. Overall **10%** increase in participation within targeted market

	Canada	West	BC	AB	ON	QC	Atlantic
Postal Walk Delivery Area							
In target area	4.3%	4.5%	4.0%	5.4%	6.2%	2.6%	1.0%
School Catchment Areas							
In area	82%	81%	83%	80%	86%	80%	41%



Ski Area Promotion

93% of all participating ski areas currently have **no** mention of the SnowPass program on their website



- Need the support of the individual ski areas to help raise awareness
- If we believe in the results of the program, everyone needs to help promote it
- Less than 1% of participants learnt about the program from local ski area

Future Changes

www.skicanada.org



2013/14 Proposed Changes

- Improve the overall distribution of the program (beyond schools)
- Build upon existing relationships with schools
- Provide ski areas with access to their year end data
- Provide ski areas with year end usage analysis
- Focus marketing strategy on targeting beginners
- Increase the overall awareness of the program (internal/external)
- Strong push for additional sponsors (in conjunction with rebrand)
- Currently working with Health Canada regarding support/funding



Access to Data

- Provide ski areas access to the data
- Provide regional analysis of participation habits
- Individual resort analyses available where possible
 - > 300 unique visitors
- Provide ski areas with contact info of those that visited their area in order to allow them to market the next option for them

3. Discover Skiing & Snowboarding

2012-2013 Season Results

Total Ski Areas participated	102
Number of Results reported from ski areas	56 (55% response rate)
up from 2011-2012's response rate of 40/116 (34.5%)	

Of those 56 ski areas who responded:

Discover Skiing packages sold	35,285
Discover Snowboarding packages sold	17,218
Discover X-Country packages sold	353
Total	53,739

Discover Skiing & Snowboarding

2012-2013 Season Results

Approximate total # of Discover packages sold across Canada

Discover Skiing	64,269
Discover Snowboarding	31,361
Discover Cross-Country	1,608

**For a total of 97,239 Discover Packages sold across
Canada in 2012-2013** (Up from 73,745 in 2011-2012)

Discover Skiing & Snowboarding

2013-2014 Season

- Will move the Discover Skiing and Snowboarding section over to the goskiinggосnowboarding.ca for a cleaner and updated look.
- Will provide ski areas with logos, buttons and links to place on their website.
- Generate more social media and blog content to keep the name in circulating

Interesting stats

- *38 out of 53 (72%) responding ski areas offer helmets with their Discover Packages*
- *94% of respondents advise they advertise their Discover Packages. Website and ski area brochures being the most often used advertising choice.*



4. Canadian Ski Council Media Campaign

4. Canadian Ski Council Media Campaign

Media campaign results comparison of 2011/12 and 2012/13

	Total number of clippings 2012/13	Total number of clippings 2011/12	Percentage increase/ decrease	Circulation/Reach 2012/13	Circulation/ Reach 2011/12	Percentage increase/ decrease
Grade 4 & 5 SnowPass	106	73	45.2%	9,646,033	13,061,447	-26.0%
Discover Skiing / Snowboarding	18	13	38.5%	1,160,480	306,046	279.2%
Web site mention/CSC	9	4	125.0%	19,301,756	105,009	18281.0%
Helmets	17	26	-34.6%	18,021,960	8,838,499	103.9%
Total:	150	116	29.3%	48,130,229	22,311,001	115.7%

Notes: 2011/12 SnowPass circulation includes a small mention online on MSN Canada with a reach of 12,000,000 which accounts for 92% of the total circulation for the 2011/12 season. If you remove this, the total circulation/reach for 2011/12 is 1,061,447.



5. Skier Rider Development Pledge Form Agreements

Conseil canadien du ski 2013

Entente de participation aux programmes de développement des skieurs et surfeurs

AFIN DE VOUS ASSURER QUE VOTRE STATION EST INCLUSE DANS TOUT LE MATÉRIEL PROMOTIONNEL, RETOURNEZ CE FORMULAIRE DÈS QUE POSSIBLE :

À : **CONSEIL CANADIEN DU SKI** -

21, 4^e RUE EST, COLLINGWOOD (ONTARIO) L9Y 1T2

TÉL. : 705-445-9140 TÉLÉC. : 705-445-0525

INFO@SKICANADA.ORG | WWW.SKICANADA.ORG



COORDONNÉES DE LA STATION DE SKI

(Veuillez cocher la case ci-après si les coordonnées sont exactes. ☐ Sinon, apportez-y les changements nécessaires. Merci.)

Nom de la station

Téléphone

Adresse municipale

Ville

Adresse postale ☐ Même qu

Site Web de la station

Courriel et n° de télécopieur de

PERSONNES-RESSOURCES STATION DE SKI

Président-directeur général :

Responsable du marketing :

2013 Canadian Ski Council Skier/Rider Development Participation Agreement

TO ENSURE YOUR AREA IS INCLUDED IN ALL PROMOTIONAL MATERIALS,
PLEASE RETURN THIS FORM ASAP

TO: **CANADIAN SKI COUNCIL** -

21 FOURTH STREET EAST, COLLINGWOOD ON, L9Y 1T2

TÉL: 705.445.9140 FAX: 705.445.0525

INFO@SKICANADA.ORG | WWW.SKICANADA.ORG

AREA CONTACT INFORMATION

(Please check if the contact information below is correct. ☐ if not, please provide below the necessary changes, thank you.)

Area Name

Physical Address

City

Province

Mailing Address

☐ Same as Physical Address

Ski Area Website

Summer Contact Email/Fax

Telephone

Fax

Postal Code

Ski Area Email



Updated Pledge Process

- Introduce opt out process as opposed to annual pledge
- Will greatly help to reduce the overall administrative cost
- Will help free additional resources to promote the program
- Will allow the online application process to begin much earlier
- Will allow us to plan the printing/design etc. more effectively
- Will help in our efforts to attract major sponsors
- Ski areas will remain in the program unless we are notified otherwise
- Ski areas will be notified in writing twice each year of the deadline to opt out



6. CSC Internet Marketing Strategy

Agenda

- Current CSC URL Inventory
- Current CSC Website Visits
- Comparison of Go and Skicanada.org
 - Site amalgamation plan
 - Mock up of end result desired

Current Website Inventory and forwarded domains

CSC Industry/Consumer website

- **www.skicanada.org**
- **www.canadianskicouncil.org**
www.canadasnowboard.org
- **www.conseilcanadienduski.org**
- **www.winterfeelsgood.ca**

Grade 4 & 5 SnowPass website

- **www.snowpass.ca**
- **www.passeportdesneige.ca**
- **www.passeportdesneige.org**
- **www.snowpass.org**

Go Skiing Website

- **www.goskiinggosnowboarding.ca**
- **www.goskiinggosnowboarding.org**
- **www.vivelaneige.ca**
- **www.gosnow.org**
- **www.go-skiing.ca**
- **www.go-snowboarding.ca**
- **www.vivelaneige.ca**

My Helmet Website

- **www.myhelmet.ca**
- **www.myhelmet.org**

Making Winter Winners

- **www.makingwinterwinners.ca**
- **www.makingwinterwinners.org**
- **www.aidonsnosathletes.ca**
- **www.aidonsnosathletes.org**

Domains we own but are currently not forwarded

- **www.discoverwinter.ca**
- **www.discoverskiing.org**
- **www.discoversnowboarding.org**

Snow Show Website (future)

Current Site Visits | Pageviews (Oct 1/12 – Mar 31/13)

	Visits	Pageviews
Skicanada.org -	94,769	183,348
Homepage -	34,594	42,972
SnowOnline -	2,394	8,318
Discover –	1,316	3,736
About the CSC –	236	1,768
SnowPass.ca -	151,271	379,221
Homepage -	106,456	124,393
MyHelmet.ca -	994	1,189
Homepage -	973	1,113
Goskiinggosnowboarding.ca	1,354	5,330
(12/3/12 – 03/31/13)		
Homepage –	678	1,103
Ski Area Search –	15	254
Contests –	66	146
Blog -	15	144



READY? -

SET? -

GO! -

Ski Areas

Making A Comeback?

Safety -

Good Stuff -

About Us -

Blog

Ready

Thinking of hitting the slopes for the first time? We have all of the information you need right here.

Look and feel that represents the Ski Industry **YES!**

Web presence and rankings with search engines **LOW**

Step 1: Ready



READY!

Step 2: Set



SET!

Step 3: Go



GO!

WOAH!!
That's a
long URL!

WWW.GOSKIINGGOSNOWBOARDING.CA



Web presence and rankings with search engines

HIGH



Look and feel that represents the Ski Industry

NO WAY!



Welcome to the Canadian Ski Council (CSC)

The goal of the **Canadian Ski Council** is to increase participation in recreational snowboarding, alpine and cross-country skiing in Canada. To that end, the Council has identified four main areas of emphasis for its activities:

• Marketing and Promotion

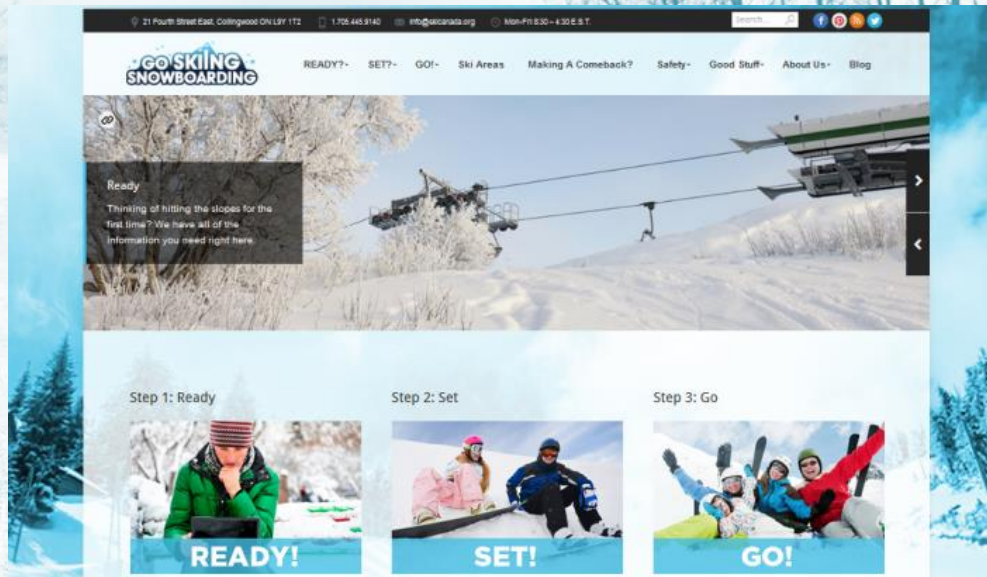


WWW.SKICANADA.ORG

HERE'S THE PLAN

COMBINE ALL OF THE
NUMEROUS CSC WEBSITES
UNDER ONE BANNER

WWW.SKICANADA.ORG

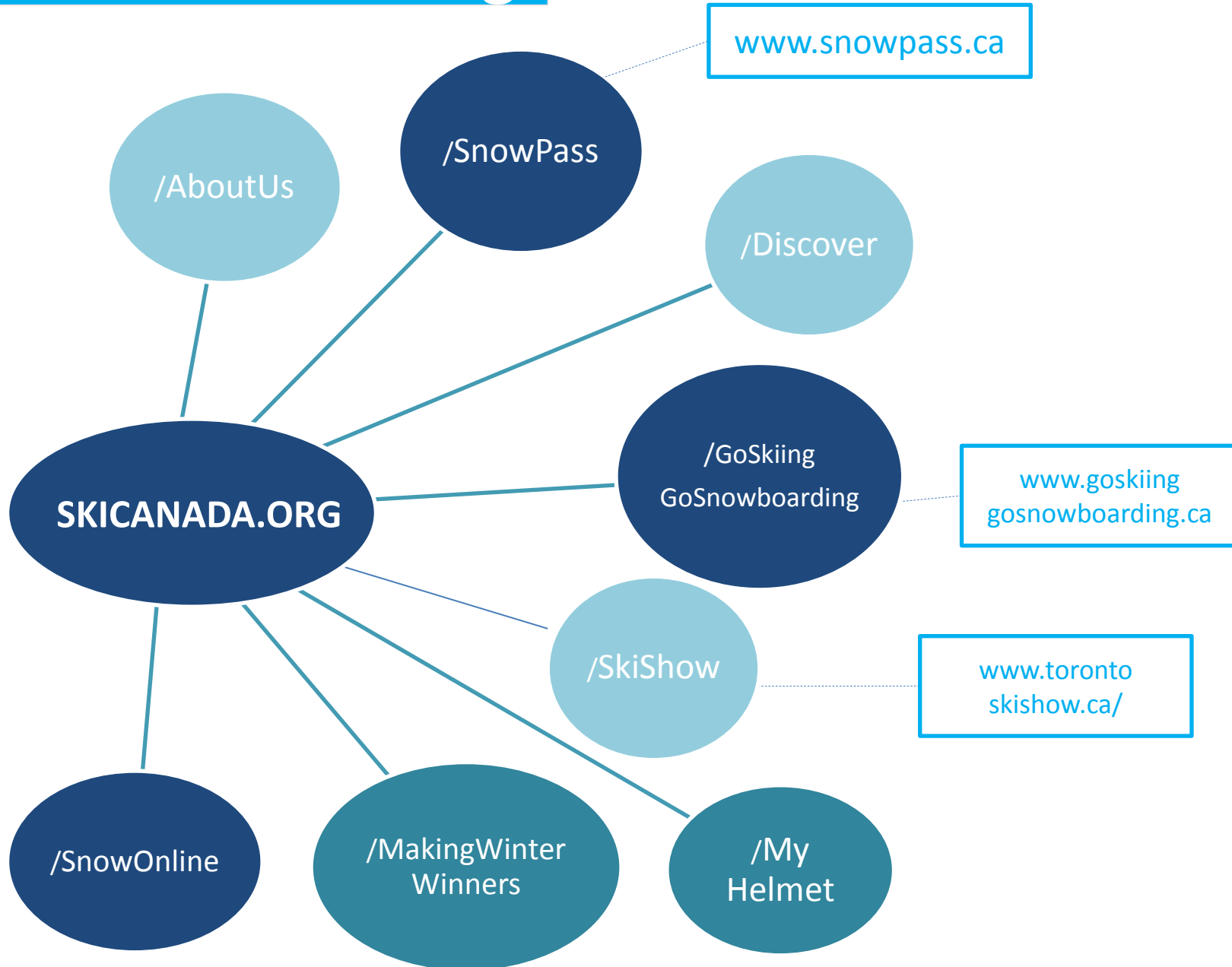


USE GOSKIING WEBSITE
ARCHITECTURE FOR NEW
SKICANADA.ORG

COMBINE, UPDATE, REWRITE
AND ADD NEW CONTENT

MAKE IT SEO FRIENDLY

The New Skicanada.org



EST VOILA!

35 Fourth Street East, Collingwood ON L9Y 1T2 | 1.706.446.5140 | info@skicanada.org | Mon-Fri 9:30 - 4:30 E.S.T.

Search [] [] [] []

SUBSCRIBE TO SNOWONLINE E-NEWS []

SKICANADA.ORG

Go Skiing | Go Snowboarding | Grade 4 & 5 SnowPass | Deals | SnowCentral | About Us

GO SKIING | GO SNOWBOARDING

Want to get out on the slopes this season?
Latest ski & snowboard tips, offers,
information, deals, news and more!

**GO SKIING
SNOWBOARDING**

GRADE 4 & 5 SNOWPASS >>

**GRADE 4 & 5
SNOW
PASS**

SIGN UP TODAY!

GO SKIING | GO SNOWBOARDING >>

**GO SKIING
SNOWBOARDING**

DISCOVER SKIING/SNOWBOARDING >>

DISCOVER
Skiing & Snowboarding

✓ LESSON
✓ RENTALS
✓ LIFT TICKET
✓ GREAT PRICES

DISCOUNTED LIFT TICKETS >>

**LOWEST PRICED
LIFT PASSES
IN CANADA!**

ON SALE NOW

SNOWONLINE E-NEWSLETTER >>

**Snow
Online E-Newsletter**

July 4, 2013 11:30 a.m. – 1:30 p.m. E.S.T



7. 2013 Toronto Snow Show



8. Time and place of next meeting



9. Meeting adjournment

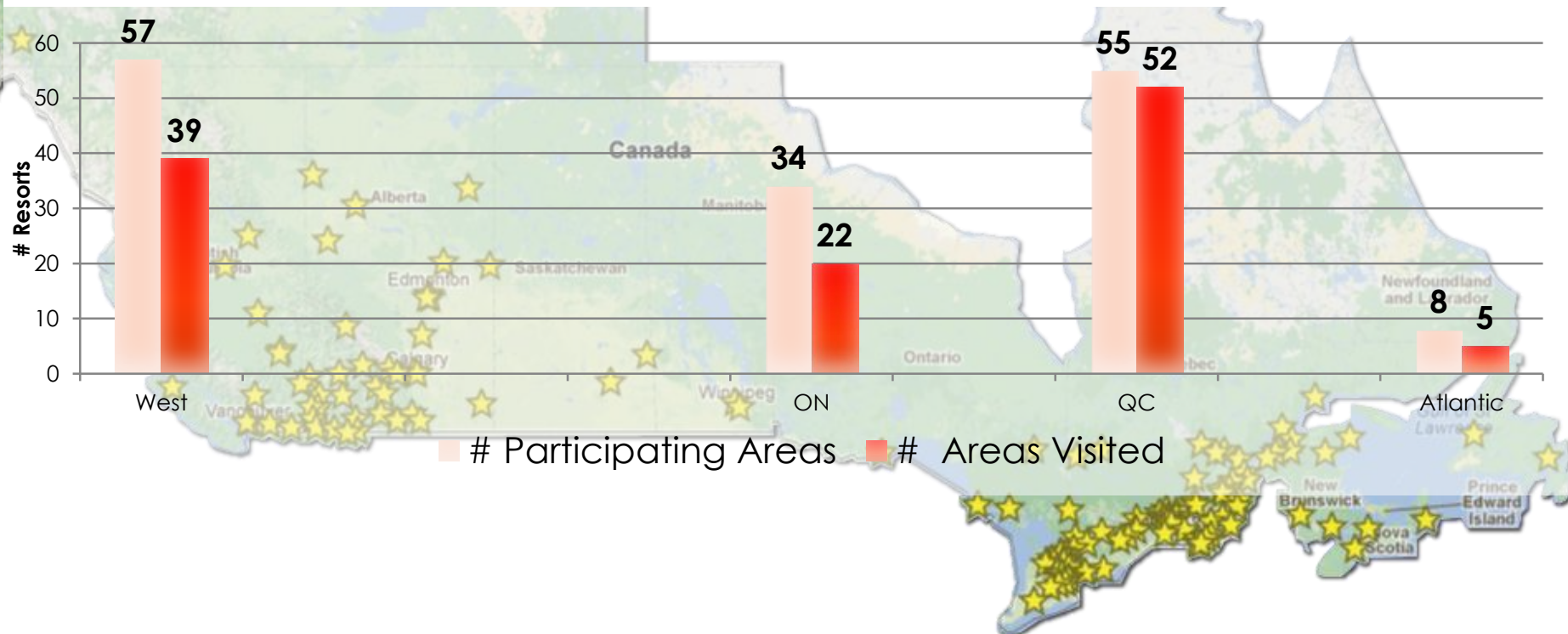


Appendix



Ski Areas Visited

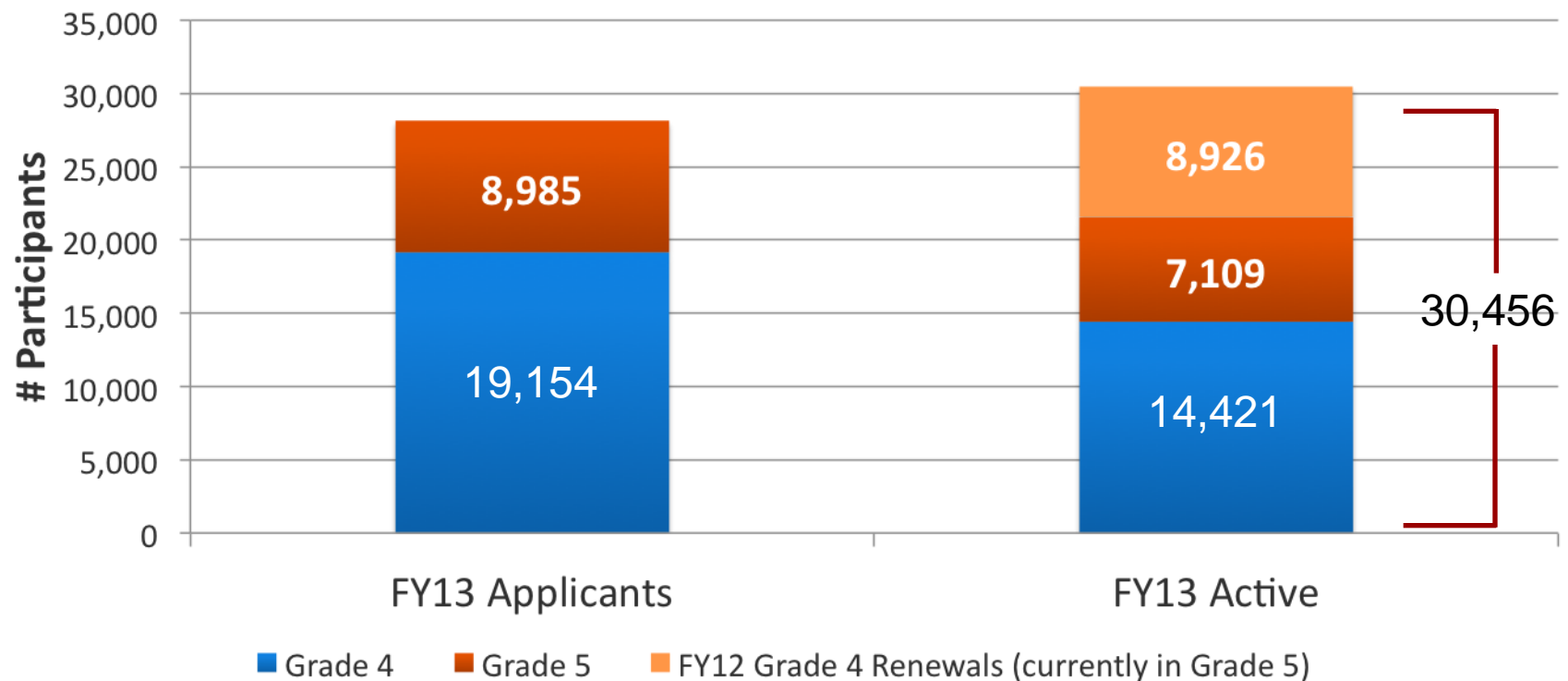
Overall, SnowPass applicants visited 75% of participating resorts.
Visitation was highest in Quebec – 94.5% of participating resorts seeing a SnowPass holder





Active Participants

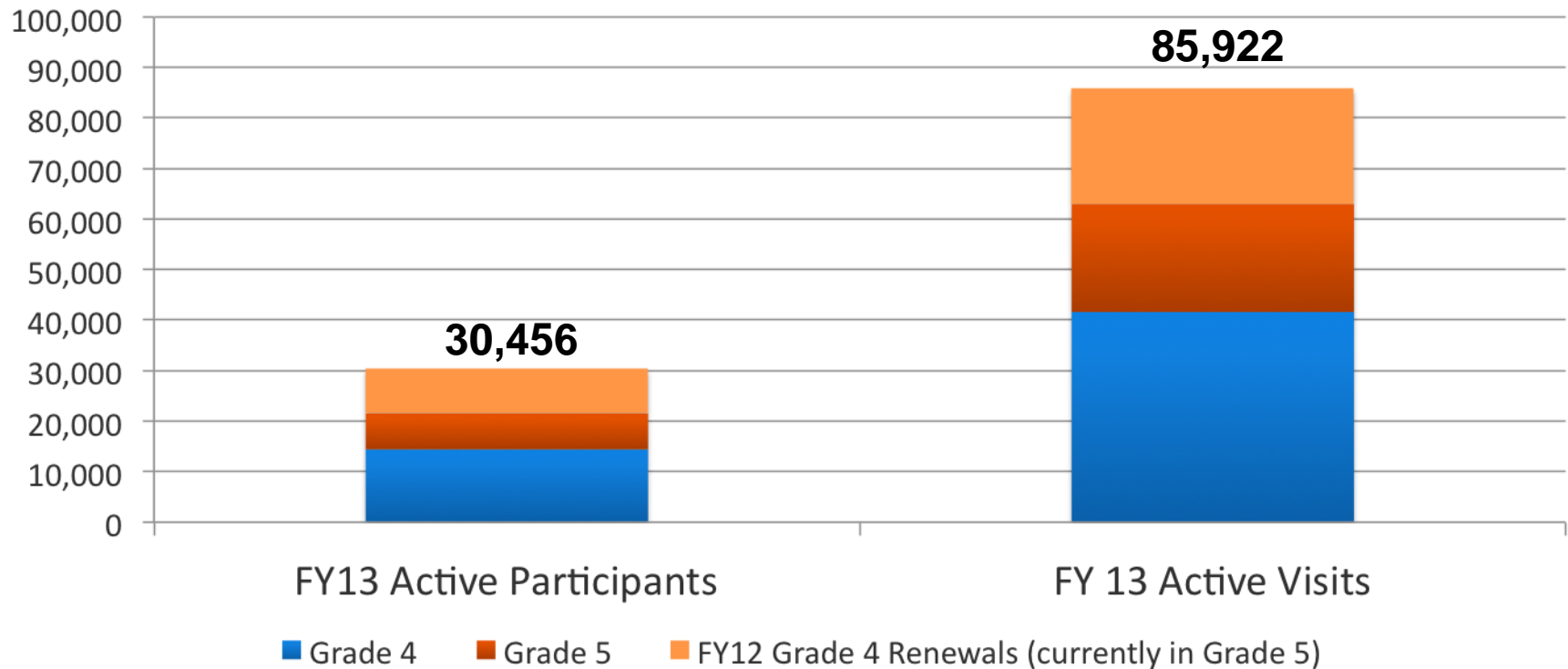
Moving to a two year pass provided an easier continuation for last year's Grade 4 participants wanting to use their pass this year.





Active Participants

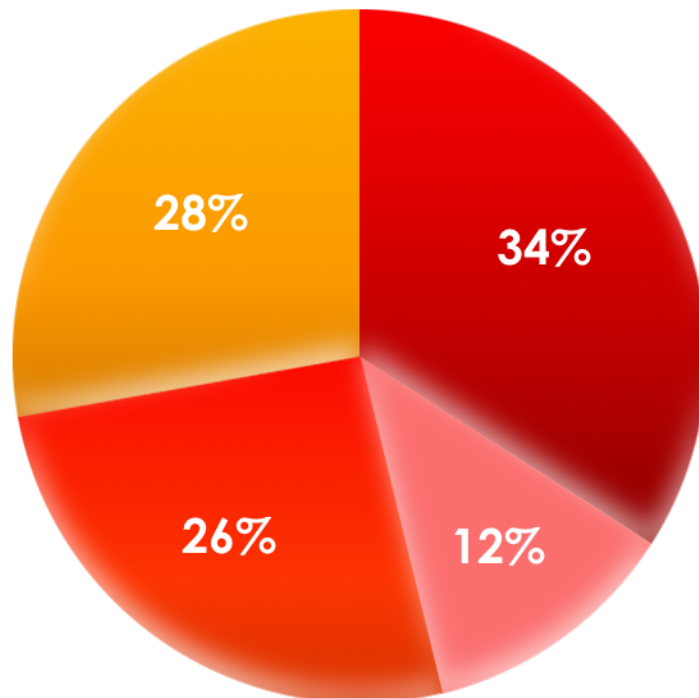
In total there were 30,456 active participants who made 85,992 visits to participating areas





Last Year's Beginners

Of the Grade 4 applicants from 2011-12 with no experience – 28% look to be snowsport enthusiasts having been introduced to the sport in 2011-12 and continued to participate in 2012-13



40% Active Users

- NON-USERS - Did not use last season or this season
- LATE-STARTERS - Used this season but not last season
- DROP-OUTS - Used last season but not this season
- CONVERTS / NEW ENTHUSIASTS - Used this season and last season

Non active users may still be participating, but are not using the SnowPass to do so



Grade 4&5 SnowPass

- New Major Sponsor
- Additional contribution of weekly prizes

ripzoneTM
international.com

powder roomTM
international.com



Deciding who to target?

1. Core Markets

- Upper-middle class families predominantly skiers

2. Suburban Families

- Families with kids at home and a tendency to be beginners over core

3. Quebec Affluent Francophone Families

- Upper-Middle families with higher percentage of existing core

4. Quebec Middle Class Francophone Families

- Families with kids at home and a tendency to be beginners over core

5. Potential Markets

- Families with kids at home but moderate representation in database

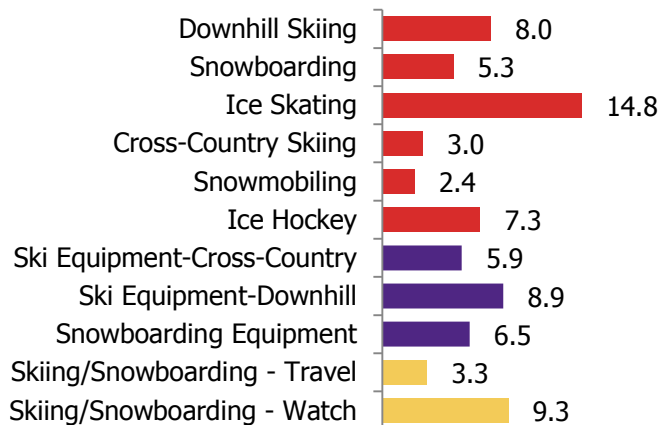
Suburban Families: Leisure and Retail Behaviours



Winter Sporting Activities

Population 12+

Index	*
112	
106	
108	
82	
61	
103	
91	
110	
128	
96	
98	



■ % Participated in past year
 ■ % Own Equipment
 ■ % TV Viewing and participated during travel in past year

Sporting Goods Retailers

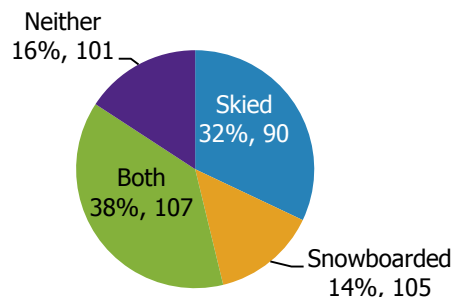
% shopped in the past year



CSC Participants' Prior Experience⁺

Times	Count	% Comp	Index
0	2,786	15.8	101
1	2,662	15.1	108
2	2,295	13.0	120
3	920	5.2	105
4	810	4.6	99
5	855	4.8	99
6	794	4.5	100
7	378	2.1	93
8	477	2.7	96
9	275	1.6	101
10+	5,385	30.5	90
Beginner (<5)	9,473	53.7	107
Core (5+)	8,164	46.3	93
Total	17,637	100.0	100

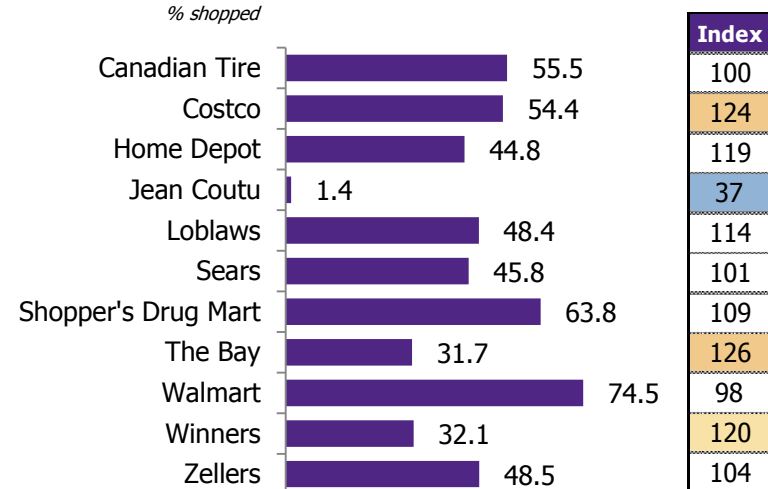
- 13% of Suburban Family participants have re-applied (100)
- Skew more towards being 'beginner' skiers/snowboarders than the average CSC SnowPass participant



Index	<80	110-119	120-149	150+
-------	-----	---------	---------	------

Major Retailers

% shopped



* Index vs. English Canada ⁺ Index vs. All CDN Participants