

# ETHNIC COMMUNITIES PARTICIPATION IN SKIING AND BOARDING

## ETHNIC SKIER AND BOARDER PROFILE

REPORT #3



## 1 Introduction

This report is the third in a series of reports developed to identify the issues and information available on participation by Canada's ethnic population in skiing and boarding. Canada's ethnic population is increasing as a percentage of the overall population through immigration and higher birth rates, and the snowsports industry wishes to ensure that its products, services and marketing can meet the needs of ethnic communities.

Prior Reports in this series include an overview of ethnicity and immigration to Canada, and an analysis of data from the Print Measurement Bureau on ethnic participation in skiing and boarding. This report examines data from the Annual Skier and Boarder Surveys conducted by the Canadian Ski Council at ski areas in Canada.

Ski areas across the country administer surveys on a random basis to skiers and boarders at the area. Each resort will administer between 300 and 2,000 surveys, depending on the size and interest of the resort. The surveys are analyzed on a national basis and weighted to the number of skier visits at the resort. The national sample size varies, but in recent years has been in the range of 30,000.

Since the 2002/2003 survey, a question has been asked about the ethnic background of the respondent. Unfortunately, the options available in responding to the question have varied, due to space and/or time limitations, and on the interests of the Research Committee of the CSC.<sup>1</sup> This variance in responses makes overall year to year comparisons difficult, although there are some ethnic backgrounds which are consistent. The following table shows the ethnic backgrounds for the past 5 years.

**Table 1 – Ethnicity of Skiers and Boarders**

2002/2003		2003/2004		2004/2005		2005/2006		2006/2007	
White (Caucasian)	89.7%	White (Caucasian)	89.9%	White (Caucasian)	87.9%	White (Caucasian)	91.7%	White (Caucasian)	88.1%
Aboriginal	0.8%	Aboriginal	0.4%	Aboriginal	0.4%	Aboriginal	0.8%	Aboriginal	0.4%
Black	1.2%	Black	0.8%	Black	1.2%	Black	0.4%	Black	1.0%
Japanese	0.8%	Japanese	1.2%	Japanese	1.7%	Japanese	1.1%		
Chinese	1.6%	Chinese	2.4%	Chinese	2.7%	Chinese	2.1%		
		Latin American	0.8%	Latin American	1.0%	Latin American	1.1%	Latin American	0.6%
		Korean	0.8%	Korean	1.4%	Korean	0.8%		
		Arab	0.4%	Arab	0.6%	Arab	0.4%		
Other Asian	1.6%	Southeast Asian	0.1%	Other Asian	1.0%	Other Asian	0.6%	Asian	4.5%
		West Asian	0.1%						
		South Asian)	0.3%						
		Filipino	0.3%						
Other	4.4%	Other	2.5%	Other	2.2%	Other	0.9%	Other	5.2%

<sup>1</sup> The participating ski areas change annually, which may have an impact on the market shares. The methodology of administering the survey has also changed over the time frame.

Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

Caucasians (or whites) make up the large majority of skiers and boarders. The percentage varies between 88% and 92% on an annual basis over the 5-year period. With the changes in methodology and participating areas, and the margin of error, it is likely that the percentage of White participation has not changed significantly over the 5 years.

Four other ethnic groups have had consistent presence on the surveys over the time frame. Aboriginal participation in skiing and boarding has ranged between .4% and .8% and this difference is not likely of significance. Black participation has ranged between .4% and 1.2% and with this range, differences could be significant between years, but there is no apparent trend. The market share of those of Japanese ethnicity varies between .8% and 1.7% over a 4 year time frame, which are also likely to be significant differences annually, but other than peaking in 2004/05, show no trend.

The Chinese are the largest ethnic group in Canada, and their market share ranges between 1.6% and 2.7% over 4 years. Participation by Chinese also peaked in 2004/05, but declined in 2005/06. The last ethnic group to have 4 years of data collected are Latin Americans. This ethnic segment's market share ranges between .6% and 1.1%.

With the different selection of ethnic groups included annually, it is difficult to draw many conclusions on trends. It would appear that the Chinese make up the largest market segment of the ethnic groups, followed by the Japanese.

The data from the 2003/04 Survey contains the largest number of ethnic groups and will be used for the balance of this report. These match up very well with the ethnic breakdown contained in the PMB surveys. The following table compares the 2003 Skier Survey data with the 2007 PMB data on ethnic backgrounds of skiers and boarders.

**Table 2 – Comparison of Skier Survey Data to PMB Data**

<b>2003/04 Skier Survey<sup>2</sup></b>		<b>2007 PMB</b>	
White	91.6%	White	85.9%
Aboriginal	0.4%	Aboriginal	1.4%
Black	0.7%	Black	2.4%
Japanese	0.8%	Japanese	0.5%
Chinese	2.2%	Chinese	3.4%
Latin American	0.5%	Latin/Central & South America	1.1%
Korean	0.7%	Korean	0.3%
Arab	0.4%	Arab	0.6%
Southeast Asian (Cambodian, Indonesian, Vietnamese, etc.)	0.1%	East/South Asian	1.1%
West Asian (Afghan, Iranian, etc.)	0.1%	West Asian	0.6%
South Asian (East Indian, Pakistani, Sri Lankan, etc.)	0.3%	South Asian	2.8%
Filipino	0.3%	Filipino	0.7%
Other	1.7%	Other	0.6%

These two surveys are based on different methodologies, and cover different time frames, so differences should be expected. Many of the differences between the smaller ethnic

<sup>2</sup> Based on the sample of Canadians skiers and boarders only n = 22003. Sample size of those responding to the ethnic background question is 18,906.

Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

segments are within the margin of error expected. What may be of significance is the increase in the market share of Whites, from 85.9% to 91.6% in the Skier Survey. This may be due to bias in the survey sampling methodology of the Skier Survey, but is more likely due to a large number of non-responses to the ethnicity question of approximately 3,000 (or about 15%).

The annual Skier Surveys include all skiers and boarders at ski areas, and so include a proportion of visitors to Canada. As the emphasis in this project is on the Canadian market, most of the analysis focuses only on Canadians, and the data excludes visitors to Canada. Nevertheless, the ethnic background of visitors to Canada who ski and board are important.

**Table 3 – Comparison of the Canadian Ethnic Market to All Skiers and Boarders**

	<b>Canadians only</b>	<b>All Nationalities</b>
White	91.6%	90.1%
Aboriginal	0.4%	0.4%
Black	0.7%	0.8%
Japanese	0.8%	1.1%
Chinese	2.2%	2.3%
Latin American	0.5%	0.8%
Korean	0.7%	0.8%
Arab	0.4%	0.4%
Southeast Asian	0.1%	0.1%
West Asian	0.1%	0.1%
South Asian	0.3%	0.3%
Filipino	0.3%	0.3%
Other	1.7%	2.5%

This information suggests that the Japanese and Latin Americans international markets are of importance to the snowsports industry. Further analysis shows this to be the case.

**Table 4 – Proportion of Ethnic Skiers and Boarders from International Markets**

White	19.3%
Aboriginal	9.0%
Black	28.9%
Japanese	44.2%
Chinese	24.4%
Latin American	47.5%
Korean	26.0%
Arab	15.5%
Southeast Asian	21.4%
West Asian	8.3%
South Asian	6.1%
Filipino	24.4%
Other	45.3%

Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

Overall 20.6% of skiers and boarders at ski areas are visitors to Canada<sup>3</sup>. 19.3% of White skiers and boarders are from international markets. However, the percentage is much higher of many of the ethnicities. Nearly ½ (47.5%) of skiers and boarders of Latin American ethnicity are from international markets, and 44.2% of Japanese are from international markets. This means that many of the Japanese and Latin American skiers and boarders seen at ski areas are not Canadians. About ¼ of Black, Korean and Filipino skiers and boarders at Canadian resorts are not Canadians.

This data suggests that a significant proportion of the ethnic skiers and boarders at Canadian resorts reside in other countries. The focus in this report is on Canadian residents of ethnic backgrounds, and data will be used which only includes Canadian residents. Nevertheless, a separate analysis which examines visiting skiers and boarders would be of use in international marketing.

With the methodological issues inherent in the Annual Skier Surveys, it is difficult to identify any trends in the participation of ethnic groups. Although comparisons have been made between the 2003 Skier Survey and the 2007 PMB Data because the ethnic categories are the same, the methodologies are different and direct comparisons should be interpreted with care. The balance of this report will use the results of the 2003 – 04 Skier Survey as the ethnic categories are the same, and the 2007 – 08 Skier Survey will use the same ethnic categories as both the PMB data and the 2003 – 04 Survey.

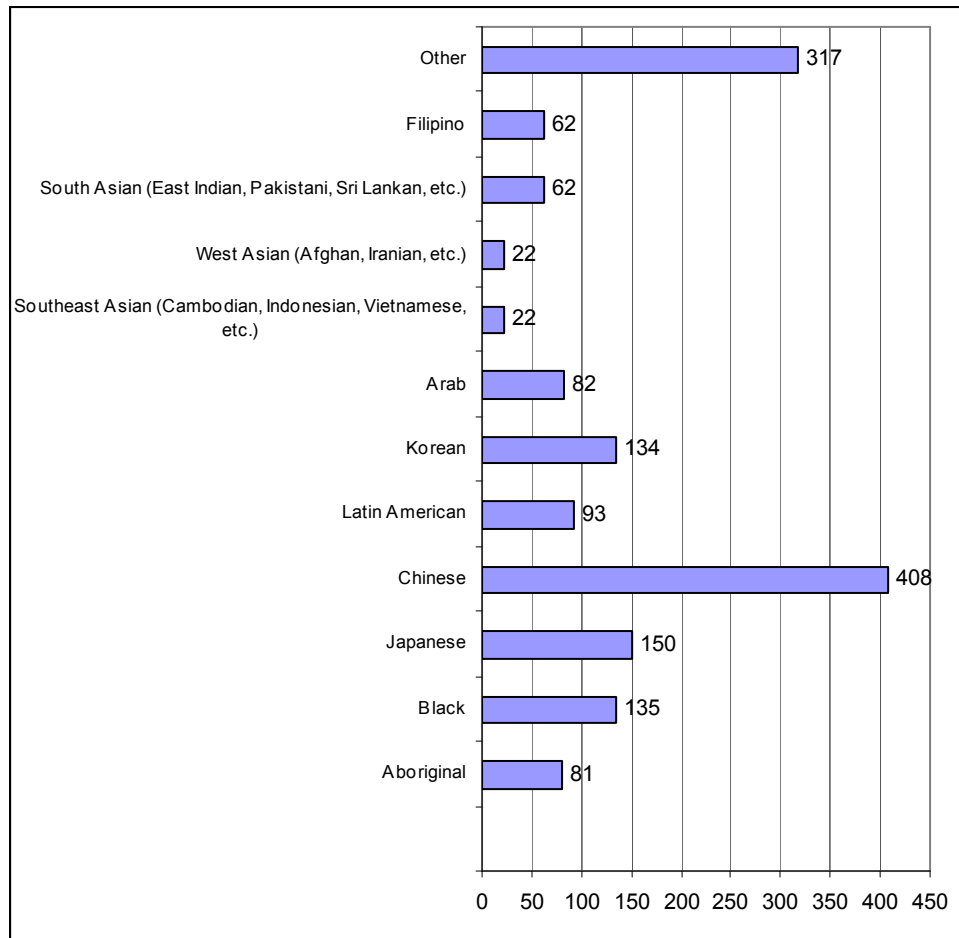
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<sup>3</sup> Of those who answered the ethnicity question. The total percentage of all respondents may be different. Data from the 2003/04 Survey

## 2 Demographic Overview of Ethnic Skiers and Boarders

The balance of this report will use data from the 2003/04 Skier Survey, using the sample of Canadian residents only. The total sample of Canadians for this year is approximately 22,000, but not all respondents replied to the question on ethnicity. This means that the total sample size for this report is based on a sample of approximately 18,900.<sup>4</sup> The following chart shows the size of each of the ethnic samples. The White sample is approximately 17,000, but is not included on the chart as it impacts too much on the scale.

**Chart 1 – Size of the Ethnic Sample**



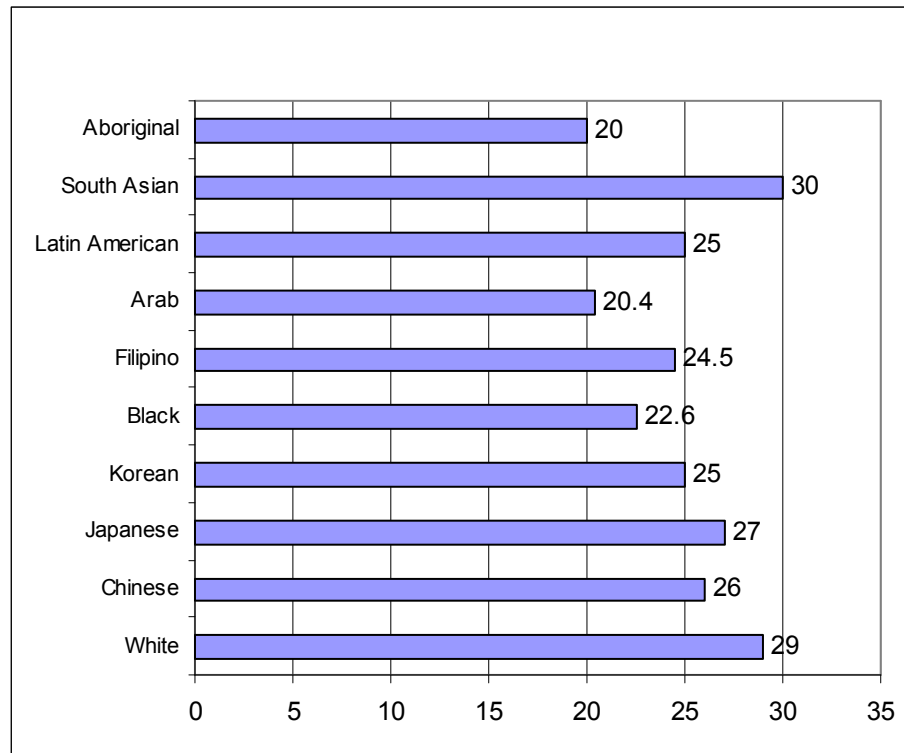
Thus the size of the Chinese, Japanese, Black and Korean samples are reasonable. Other samples should be viewed with caution, while the West Asian and Southeast Asian samples are not reliable, and will not be generally included in this analysis.

The PMB research indicates that skiers and boarders from non-White ethnic backgrounds tend to be younger, which is logical, as immigrants to Canada tend to be younger as well. The following chart shows the median age of each of the ethnic groups of skiers and boarders.

<sup>4</sup> This varies by question, as not all respondents answered all questions.

Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

**Chart 2 – Median Age of Ethnic Skiers and Boarders**



The median age of White Skiers and Boarders is 29, which nest to South Asians is the highest of the ethnic groups. The Japanese are the next oldest, followed by the Koreans and Latin Americans and the Aboriginal and Arab segments are the youngest. Nearly ½ (44%) of Chinese skiers and boarders are under the age of 24, with 60% of Blacks, 57% of Arabs and 50% of Koreans under 24 years of age. In comparison, just 42% of Whites are under 24.

**Table 5 – Participation in Skiing and Boarding**

As would be expected with the younger median ages of the ethnic populations, there tend to be more ethnic boarders. The adjacent chart shows the percentages of skiing and boarding, along with the median age.

Whites tend to be skiers (61%) more than boarders (33%), which is the highest

	Skiers %	Boarders %	Other %	Median Age
White	61	33	6	29
Chinese	56	38	6	26
Japanese	37	52	11	27
Korean	41	53	6	25
Black	47	42	11	22.6
Filipino	36	56	8	24.5
Arab	49	34	17	20.4
Latin American	51	38	11	25
South Asian	54	33	13	30
Aboriginal	34	59	7	20
Other	56	36	8	25

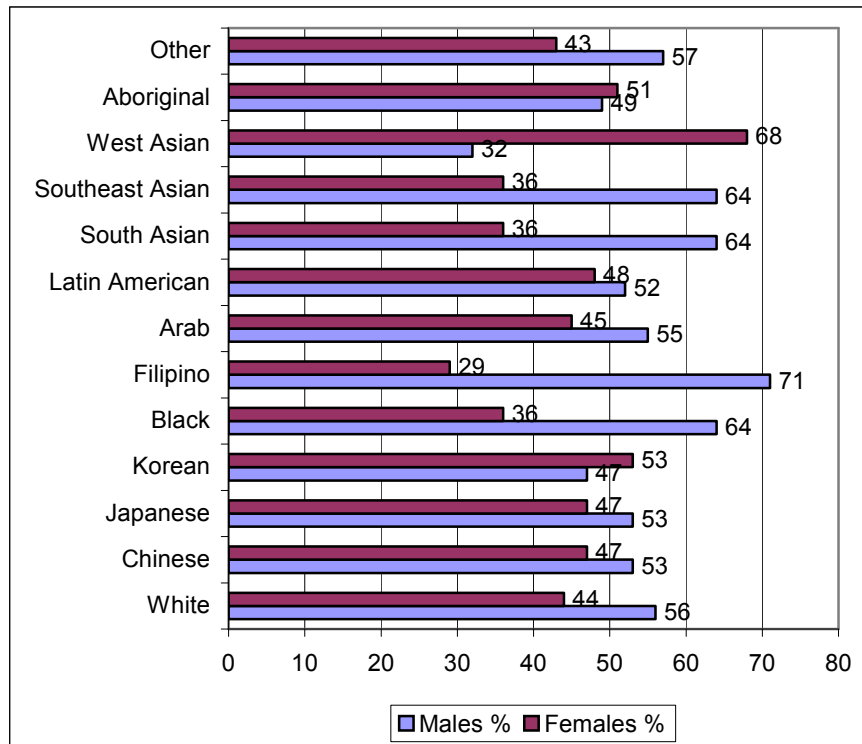
percentage of skiers among the ethnic groups. Many of the ethnic groups are primarily boarders, with the Japanese, Korean, Filipino and Aboriginal segments all with more boarders than skiers. While there is some linkage between median age and boarding participation, it is not consistent across all ethnic groups. Participation in cross country is

Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

low for all ethnic groups although participation in the “snowskates or other” activity is higher for Blacks, Arabs and Latin Americans.

Overall, the ski and boarder market is slightly more male (54%) oriented than female. This varies considerably among some ethnic groups.

**Chart 3 – Gender of Ethnic Groups**



The South Asian, Filipino and Black segments tend to be males to a much greater extent than Whites, while Chinese, Japanese, Korean, Arab and Latin American segments tend to have more females participating than do Whites. There are slightly more Aboriginal women who are skiers and boarders than there are males.

Household income is an important determinant of participation in skiing and boarding. The following table shows the percentage of each ethnic group of skiers and boarders in each income range.

**Table 6 – Household Income of Ethnic Groups**



Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

	< \$25,000	\$25 - \$49 K	\$50 - \$74 K	\$74 - \$99K	\$100 - \$150 K	\$150 K +
White	36	17	17	14	10	7
Chinese	35	19	23	14	4	5
Japanese	44	14	26	8	4	4
Korean	47	10	13	24	2	4
Black	40	18	15	11	7	8
Filipino	29	45	6	9	3	8
Arab	39	25	16	10	4	6
Latin American	27	9	26	10	18	10
South Asian	24	11	33	23	4	4
Aboriginal	55	10	21	4	5	5
Other	34	19	20	12	10	5

All of the ethnic groups will have median incomes of less than \$50,000 per year with Aboriginals less than \$25,000 per year. Latin Americans have the highest household incomes, with 28% over \$100,000 a year, followed by Whites (17%), Blacks (15%) and Filipinos (11%). Aside from the Latin Americans, White skiers have higher household incomes than any other ethnic segment.

**Table 7 – Comparative Household Incomes**

	< \$25,000	\$25 - \$49 K	\$50 - \$74 K	\$74 K +
Data available from the 2007 PMB Survey is available for fewer income categories. It would be expected that 2006 household incomes would be greater than that found in the 2003 data, possibly by about 10%.	White	36	17	31
	Chinese	35	19	23
	Japanese	44	14	16
	Korean	47	10	30
	Black	40	18	26
	Filipino	29	45	20
	Arab	39	25	20
	Latin American	27	9	38
	South Asian	24	11	31
The bottom two rows of this table show the household incomes for all skiers and boarders as	Aboriginal	55	10	14
	<i>All Skiers</i> <sup>5</sup>	9	23	41
	<i>Cdn Population</i>	16	24	38

obtained from the PMB survey, as well as the household incomes of all Canadian households. This data shows that skiers and boarders come from a much higher percentage of high-income households, with 41% living in households with incomes above \$75,000. Few skiers and boarders live in low-income households, according to PMB data. In comparison using the 2003 Skier Survey data, approximately 1/3 of skiers and boarders live in low-income households. The results of the 2006 Skier Survey are much closer to those of the PMB Survey although the results are not directly comparable due to changes in the income classifications. In the 2006 Skier Survey, 15% of skiers are low income and 13% are mid-income (\$25 – \$49K).

The following table shows the household makeup of each of the ethnic groups of skiers and boarders.

**Table 9 – Household Status**

<sup>5</sup> Data from the 2007 PMB Survey

Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

	<b>Younger than 17</b>	<b>Single</b>	<b>Couple No Children</b>	<b>Hsld with Children</b>	<b>Hsld with children gone</b>
Chinese	26	26	13	26	8
Japanese	17	38	21	18	7
Korean	28	41	5	23	5
Black	44	27	16	9	3
Filipino	26	40	8	24	2
Arab	44	26	18	9	3
Latin American	24	37	3	25	11
South Asian	22	30	4	37	6
Aboriginal	34	43	8	14	1

As was shown in the mean ages of ethnic skiers and boarders, they have a very high proportion of youth or live in single households – ranging from 52% for Chinese to 71% for Blacks and 70% for Arabs. Aboriginals have the highest proportion of skiers living by themselves, at 43%, followed by Korean skiers and boarders at 41%. South Asians have the highest proportion of skiers and boarders living in households with children at 37% and Blacks and Arabs have the lowest proportions at 9%.

Most of the ethnic skier population lives in the four largest provinces as shown in the following table. Ontario has the largest percentage of most of the ethnic groups, except for BC with Chinese and Japanese and Quebec with Arab skiers and boarders.

**Table 8 – Province of Residence**

	<b>Quebec</b>	<b>Ont.</b>	<b>BC</b>	<b>Alberta</b>
Chinese	15.1	27.8	39	15
Japanese	16.6	18.6	45.1	16.5
Korean	11.7	55.6	17.7	14.3
Black	34.2	42.4	5.5	12
Filipino	12.6	30.9	22.9	26.6
Arab	49.6	26.6	11.9	6.9
Latin American	22.8	30.5	22.2	20.2
South Asian	14.1	59.1	24.2	2.7
Aboriginal	13.4	18.4	24.4	32.7

Ontario has about 39% of the population of Canada and about 25% of skiers and boarders<sup>6</sup>. In terms of the overall skier market, Ontario has more than its share of the Korean, Black, Filipino, Latin American and South Asian ethnic segments, and about the same proportion of the Chinese and Arab segments.

Quebec has about 24% of the population of Canada and 32% of the skiers and boarders. Only the Arab ethnic segment is over represented among Quebec skiers and boarders, and all other segments are under represented, except for Blacks who are at about the same percentage.

British Columbia represents about 13% of the population of Canada and 8% of skiers and boarders. All ethnic segments, except for Blacks, are over represented among BC skiers.

<sup>6</sup> 2007 PMB Data

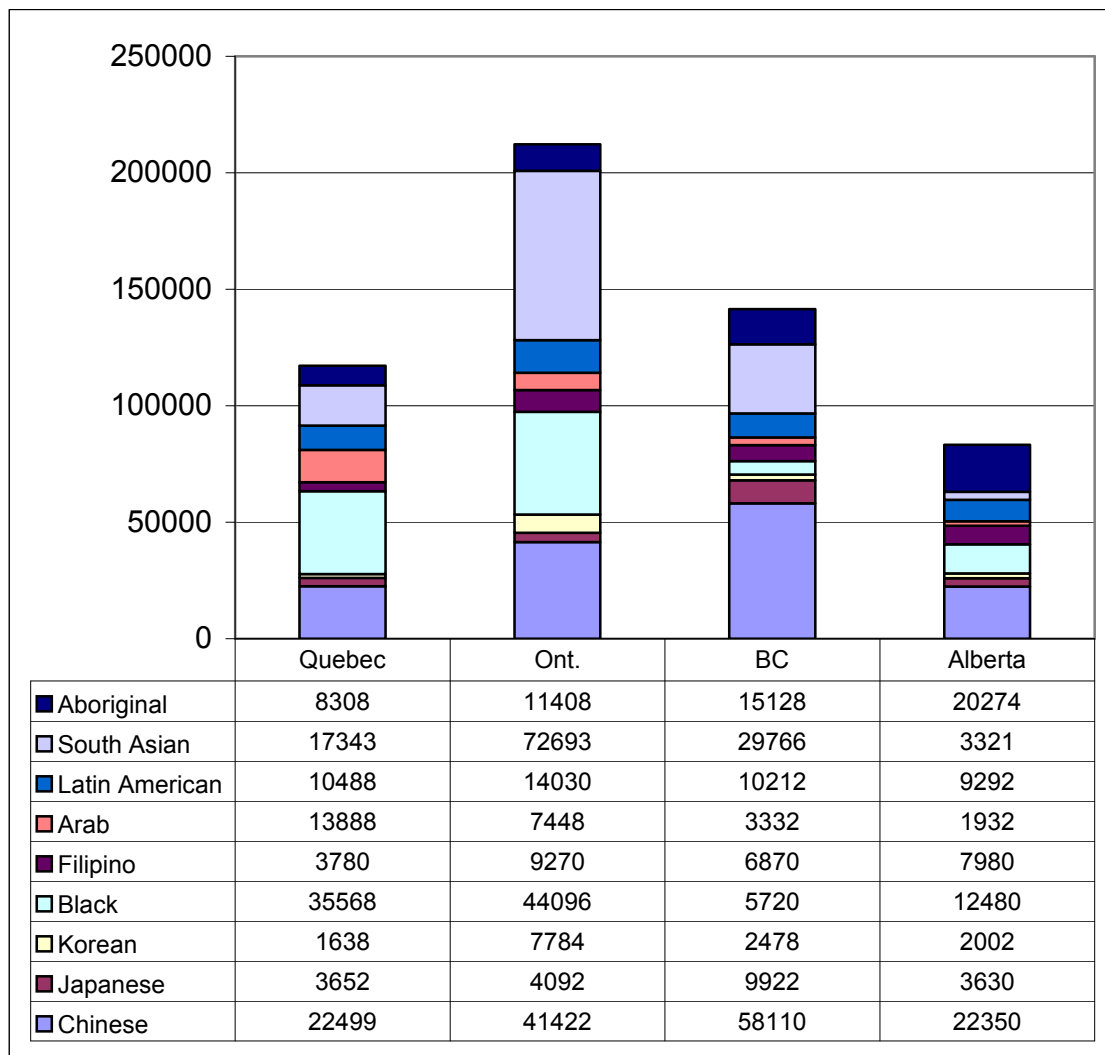
Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

In 2007, PMB data identified that there 4.365 million skiers and boarders in Canada. Using this as the total market, and the size of each of the national ethnic markets from the PMB data, the following chart identifies the size of the ethnic ski and boarder market in each of the 4 provinces, using the percentages within each province from the 2003 Skier Survey.

This chart points out the importance of the ethnic markets to BC and Ontario and the key markets for each. Ontario has over 212,000 ethnic skiers and boarders and BC 141,000. There are 117,000 ethnic skiers in Quebec and 83,000 in Alberta.

Quebec's largest ethnic market is the Blacks (35,568 skiers and boarders), followed by the Chinese (22,419). Ontario's largest ethnic market are the South Asians (72,693), followed by Blacks and Chinese. British Columbia's largest ethnic market is the Chinese (58,110) followed by the South Asian. Alberta's largest ethnic market is the Chinese (22,350) followed by the Aboriginal.

**Chart 4 – Size of the Provincial Ethnic Markets**



Clearly the ethnic markets are an important segment of the overall snowsports market in Canada. However, the markets are not proportionally spread across the provinces. The

Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

Chinese market is important to all of the provinces, ranking between #1 and #3 in all 4 provinces. The South Asian is the next largest, and important to both BC and Ontario, but is less important in Quebec and not important to Alberta.

This suggests that each province will need to develop strategies directed against the ethnic markets that are most important in its ethnic mix.

### 3 Learning to Ski and Board

Many of the ethnic groups of skiers and boarders started with friends more so than they did with family, particularly the Japanese, Korean, Arab and Latin Americans. This is unlike White skiers who tend to start with family. School groups are particularly important for Blacks, Arabs, Aboriginals and Latin Americans while the South Asians are more likely to start with Ski Clubs than through schools.

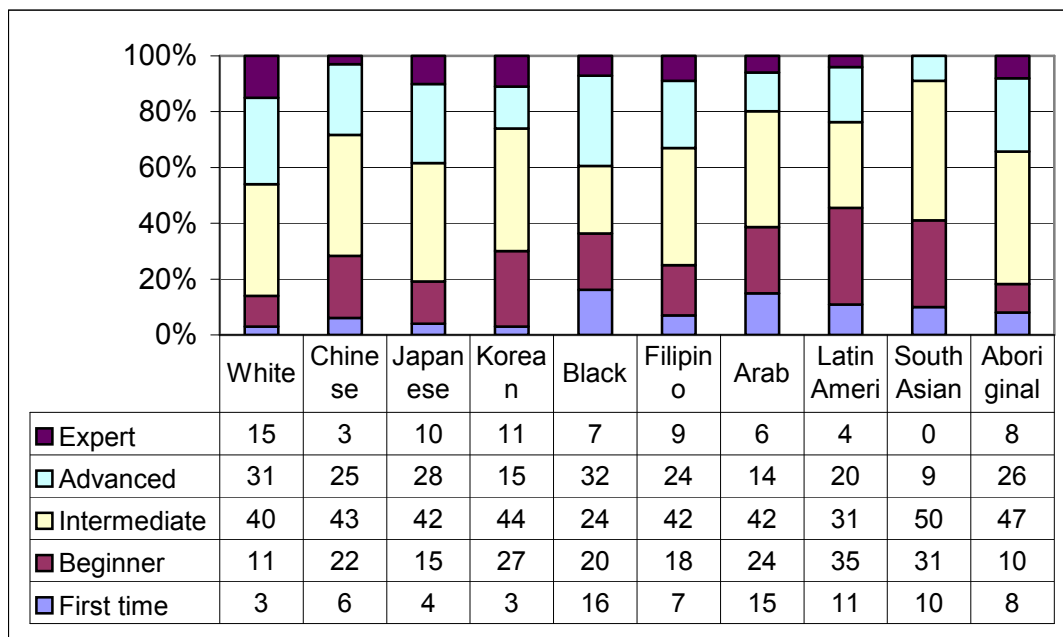
**Table 10 – Starting to Ski and Board**

	Family	Friends	School	Club	Other
White	41	39	12	4	5
Chinese	33	38	17	5	6
Japanese	19	49	15	5	12
Korean	39	45	8	3	5
Black	31	37	23	8	7
Filipino	45	32	13	4	6
Arab	27	38	24	7	4
Latin American	26	36	28	1	10
South Asian	29	43	10	16	2
Aboriginal	26	42	24	3	4

This suggests that school and peer groups will be particularly important vehicles to help ethnic children start the activity. As a high percentage of the ethnic population are recent or first generation immigrants, its unlikely that parents will have had exposure to snowsports (or snow for that matter) and so will be less likely to encourage their children to take up.

This chart shows the ability levels of each of the ethnic groups.

**Chart 5 – Ability Levels**



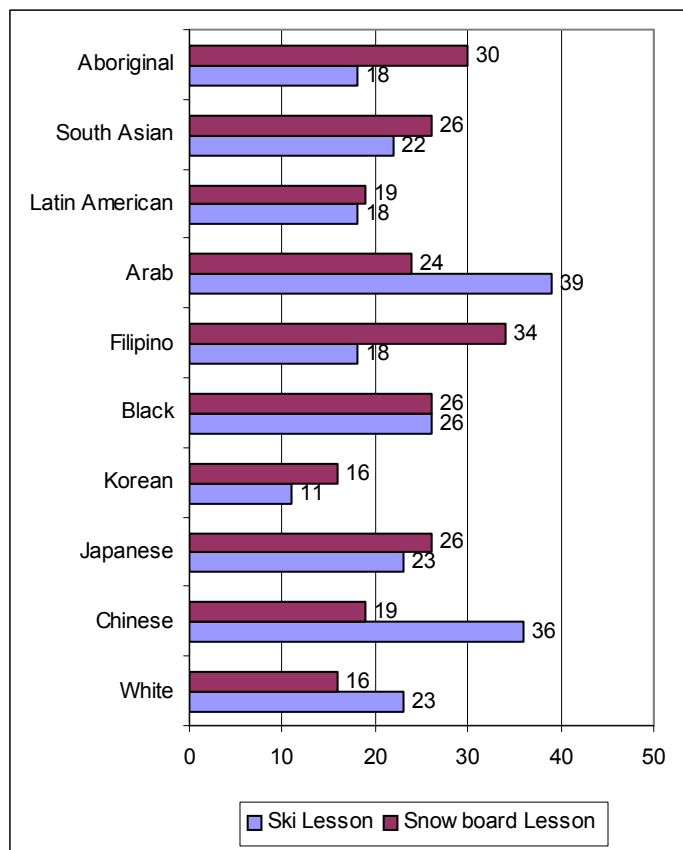
Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

As a group, ethnic skiers and boarders are not at the same levels as White skiers and boarders. White and Korean skiers and boarders are the least likely to be “first timers”, while there is a high percentage of first time skiers and boarders among Arabs, Blacks, Latin Americans and South Asians. This is very positive as it shows a high level of interest in taking up snowsports. The highest rates of beginners are found in Latin Americans and South Asians, followed by Koreans, Chinese and Arabs. Japanese skiers and boarders have ability levels similar to Whites, which suggests that as a group, they have been participating in the activity longer than other ethnic groups.

Overall, this data suggests that ethnic groups are just beginning to participate. It may be advantageous to develop strategies which will encourage them to continue to participate and improve their ability levels.

**Chart 6 – Taken a Lesson in the Past 2 Years**

Ethnic groups are far more likely than Whites to be taking a lesson the day of the interview. 8% of Whites interviewed were taking a lesson, while between 11% (Japanese) and 29% of Blacks were taking a lesson. While the sample sizes are too small of those taking lessons to be of use, the most popular reason for all ethnic groups to be taking a lesson was to learn the sport, or to get an introduction to it.



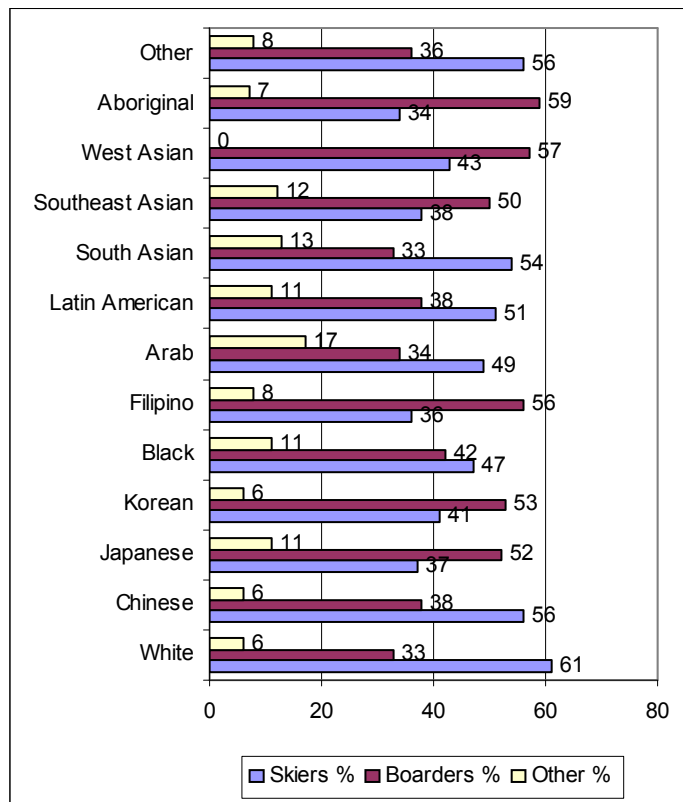
Of more importance is the percentage of each ethnic group who have taken a ski or snowboard lesson in the past 2 years. Generally, except for the Koreans, all of the ethnic groups have taken lessons to a greater extent than White skiers and boarders (recognizing that ethnic groups board to a greater extent). For many of the ethnic groups (Aboriginals, South Asians, Filipinos, and Japanese) a higher percentage has taken snowboard lessons than ski lessons. The Arabs and Chinese have taken ski lessons to a greater extent than boarding lessons.

This greater use of lessons for most of the ethnic groups speaks to their younger ages, and lower levels of ability than White skiers and boarders. Clearly they are not reluctant to take lessons (except for the Koreans) and the higher percentages of snowboard lessons reflects the higher percentages of boarders vs. skiers. Of the 12 ethnic groups, 6 have more than 50% boarders.

#### 4 Participation in Skiing and Boarding

Chart 7 - Participation

As shown in earlier data, the median age of skiers and boarders tends to be younger than for White skiers and boarders. That there tend to be more boarders than skiers among many of the ethnic groups should be no surprise. The percentage of boarders is much higher than for skiers among Aboriginals, West Asian, Southeast Asian, Filipinos, Koreans and Japanese. Among the Latin Americans, Blacks, and Chinese, the percentage of boarders is higher than that found among Whites, but is still less than the percentage of skiers.



There also appears to be greater participation in “other” snowsports which includes telemark, cross-country and snowskating. There is very little participation among ethnic groups in telemark and cross-country, but participation in “snowskating and other” is significant (> 5%) in most of the ethnic groups.

Table 11 – Experience in Skiing

	Never	1 - 9 Yrs	10 - 19 Yrs	20 + Yrs
White	25	29	20	26
Chinese	33	45	15	7
Japanese	35	41	11	13
Korean	34	39	14	13
Black	39	42	11	8
Filipino	48	30	6	16
Arab	26	56	9	9
Latin American	30	51	17	2
South Asian	43	44	8	5
Aboriginal	54	22	12	12

The high level of participation in boarding is reflected in this chart which shows that between 1/3 and 1/2 of each of the ethnic groups has never participated in skiing. The level of experience among White skiers is very high, with nearly 1/2 (46%) saying they have skied for more than 10 years. Among the ethnic groups, only a maximum of 27% (the Koreans) have over 10 years experience, and among most ethnic groups there are approximately 20% who have skied more than 10 years.

Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

**Table 12 – Experience in Boarding**

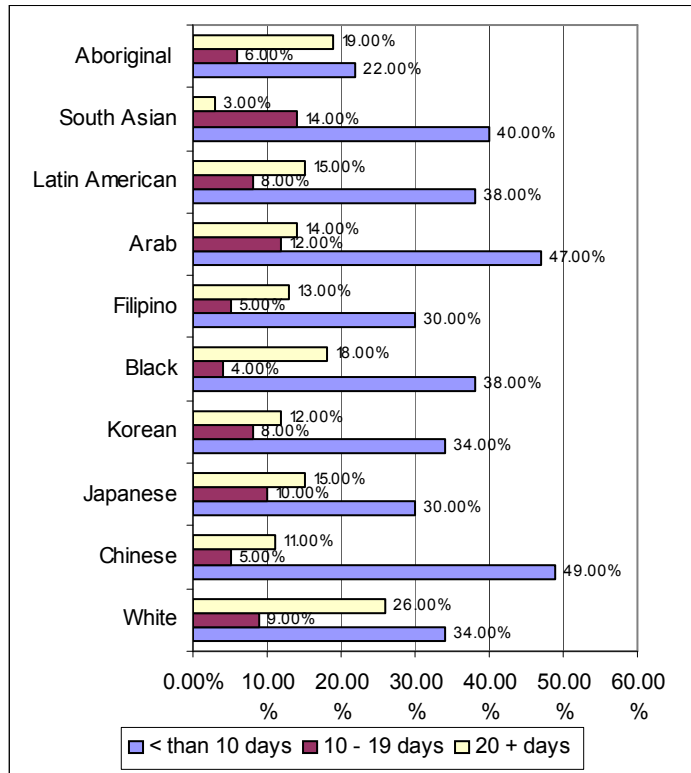
As would be expected, the levels of experience in boarding among the ethnic groups are lower than for skiing, but this also applies to White boarders. There are few boarders with greater than 10 years experience, except among Filipinos.

	Never	1 - 9 Yrs	10 - 19 Yrs	20 + Yrs
White	61	34	2	1
Chinese	54	44	1	1
Japanese	57	38	4	1
Korean	49	48	1	2
Black	45	48	6	1
Filipino	39	46	13	2
Arab	62	35	2	1
Latin American	52	43	3	2
South Asian	49	44	7	0
Aboriginal	37	52	8	3

**Chart 8 – Annual Number of Days Skied**

The adjacent chart shows the number of days respondents in each ethnic category expected to ski that year. This is a measure of the intensity of participation of each ethnic group. Over ¼ (26%) of all White skiers expect to participate more than 20 days in the 2003/04 season. This is far higher than any of the ethnic groups, with only Aboriginals close, at 19% followed by Latin Americans and Arabs at 15% and 14% respectively.

Among White skiers, 9% indicate they will ski between 10 and 19 days. This is higher than most of the ethnic groups, except for South Asians (14%), Arabs (12%) and Japanese (10%). This suggests that White skiers will participate more times per year than the other ethnic groups.



The following Chart shows the annual number of days boarding.

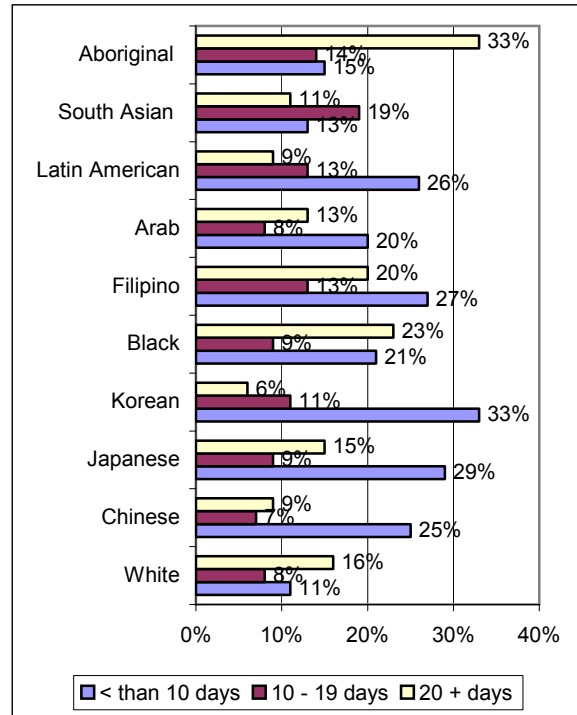


Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

**Chart 9 – Annual Number of Days Boarding**

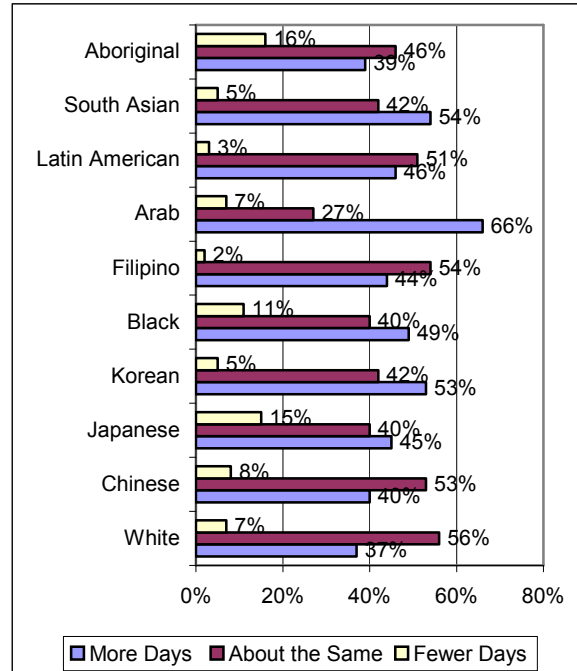
Among White snowboarders, 16% say they ski more than 20 days per year. Several ethnic groups (Blacks (23%), Filipinos (20%), and Aboriginals) have more boarders in this high category. The other ethnic groups have fewer boarders in the high participation category, although the Japanese are very close to the participation categories as Whites. Of those boarders who participate between 10 and 19 days per year, South Asians (19%), Aboriginals (14%), Latin Americans (13%) and Filipinos (13%) all have a higher percentage in this category.

Overall, this data suggests that Aboriginal boarders will board more per year than the other ethnic groups and that Blacks, Filipinos, and South Asians will board more than White boarders.



**Chart 10 – Expectations for Next Year**

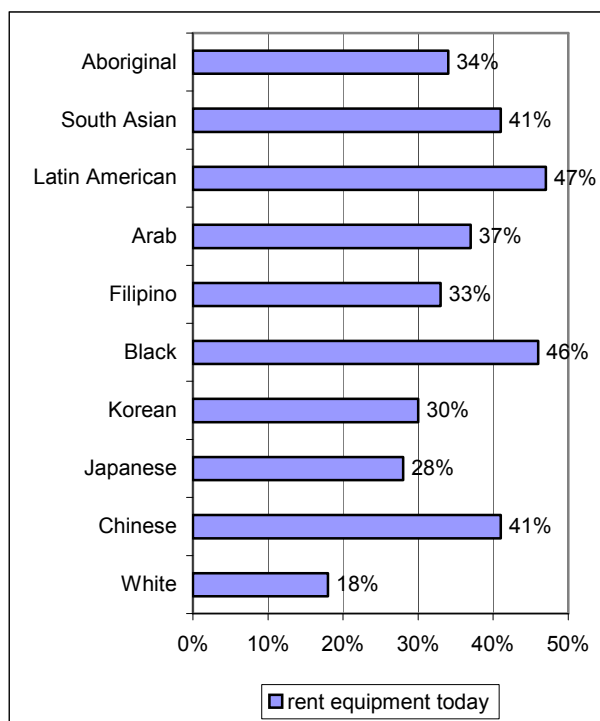
Very few participants in any ethnic group say they expect to ski or board fewer days the next year. The Arabs are the most optimistic, with 2/3 saying they expect to participate more days. South Asians are not far behind, with 54% saying they expect to participate more. Among White skiers and boarders, 37% say they expect to ski or board more days. This is exceeded by every other ethnic group, which suggests that ethnic skiers and boarders are keen to participate and optimistic that they will be able to.



Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

**Chart 11 – Use of Rental Equipment**

As ethnic skier and boarders are younger than White skiers and boarders, have not been participating for as long and also do not have the same level of experience, it would be expected that they would more likely be using rental equipment the day they were interviewed. This turns out to be the case, with all ethnic groups using rental equipment to a much greater extent than do Whites (18%). Among the ethnic groups, Latin Americans (47%) and Blacks (46%) are the most likely to be using rentals, and the Japanese (28%) and the Koreans (30%) the least likely.



The following table shows the usage of different forms of lift tickets on the day the respondents were interviewed.

**Table 13 – Use of Lift Tickets**

	White	Chinese	Japanese	Korean	Black	Filipino	Arab	Latin American	South Asian	Aboriginal
<b>Regular price ticket</b>	35%	34%	38%	33%	56%	28%	44%	27%	36%	54%
<b>Season pass</b>	29%	30%	19%	26%	21%	18%	25%	18%	8%	16%
<b>Multi-day ticket</b>	9%	10%	14%	14%	5%	13%	8%	1%	10%	
<b>Group/ bulk ticket</b>	9%	8%	11%	8%	8%	21%	9%	28%	20%	9%
<b>Discount/ Frequency card</b>	6%	6%	11%	6%	4%	4%	6%	11%	2%	5%
<b>Complimentary ticket</b>	4%	4%	2%	8%	1%	5%	3%	13%	11%	8%

White skiers and boarders primarily use regular lift tickets (35%) but are also high users of season's passes (29%). The Chinese have a similar usage pattern as Whites. Blacks (56%) and Aboriginals (54%) have the highest usage of regular lift tickets, and consequently use other forms of tickets less. Multi-day, group, discount and complimentary tickets are used less frequently, although some ethnic groups use one of these to a greater extent than others, such as Latin Americans (28% group tickets and 13% complimentary tickets); 21% of Filipinos use group tickets and 20% of South Asians use group tickets.

Respondents were also asked about their level of awareness of 3 programs offered by the Canadian Ski Council – the Grade 5 Snowpass, Discover Skiing/Boarding packages and National Ski and Snowboard Week.

Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

**Table 14 – Awareness of CSC Programs**

	White	Chinese	Japanese	Korean	Black	Filipino	Arab	Latin American	South Asian	Aboriginal
<b>SnowPass Program</b>	53%	42%	40%	51%	34%	48%	50%	38%	69%	52%
<b>Disc Skiing/ Boarding</b>	55%	60%	52%	65%	59%	53%	53%	68%	25%	62%
<b>National Ski/ Board Week</b>	41%	30%	42%	32%	37%	40%	37%	40%	16%	35%

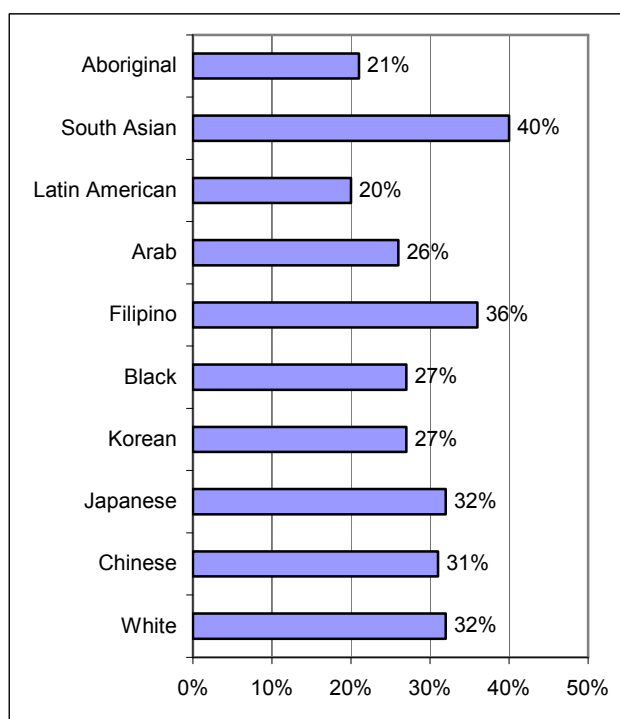
The highest level of awareness of the Grade 5 Snowpass program is found in South Asians (69%), followed by Whites (53%), Aboriginals (52%), Koreans (51%) and Arabs (50%). Latin Americans are the most aware (68%) of the Discover Packages, followed by Koreans (65%), Aboriginals (62%), Chinese (60%), Blacks (59%) and Whites (55%). The awareness of National Ski/Snowboard Week is much lower with the Japanese having the highest level of awareness at 42%, followed by Whites (41%) .

The awareness of both the Snowpass and Discover Programs is relatively high among nearly all ethnic groups. There appear to be some pockets where awareness could be increased which can be identified by having awareness levels below 40%. The generally lower level of awareness amongst all groups suggests that there is a more general problem with National Ski and Snowboard Week awareness in comparison to the other two programs.

## 5 – Travelling to Ski or Snowboard

**Chart 12 – Overnight Ski Trips**

Overall, 24% of all skiers and boarders say they are on an overnight trip when they are interviewed. This varies by ethnicity, with South Asians, Filipinos, Japanese and Whites all far more likely to be on overnight trips. Latin Americans and Aboriginals are far less likely to be on overnight trips.



The data obtained from the PMB Survey showed that most ethnic groups (except for Aboriginals) live in Canada's largest cities, with Toronto containing the largest numbers. Thus there are ski areas within day trip driving distance within a good proportion of the ethnic populations. This also is the case in Vancouver, although Whistler is more likely to be an overnight destination.

Skiers and boarders were asked which regions they would ski or board in the current year. However, this needs to be compared to which provinces they currently live in.

**Table 15 – Regions That Will be Visited on Ski and Snowboard Trips**

	White	Chinese	Japanese	Korean	Black	Filipino	Arab	Latin American	South Asian	Aboriginal
<b>B.C.</b>	42%	50%	65%	54%	35%	49%	25%	48%	26%	53%
<b>Alberta</b>	22%	22%	22%	14%	17%	25%	13%	26%		49%
<b>Ontario</b>	22%	23%	10%	33%	35%	23%	30%	18%	49%	6%
<b>Quebec</b>	36%	23%	15%	18%	34%	24%	60%	20%	33%	13%
<b>Other Can.</b>	5%	2%	5%	5%	6%	15%	10%	2%	5%	9%
<b>Other</b>	24%	17%	32%	15%	36%	27%	14%	34%	26%	4%

The most frequently mentioned destination region for all ethnic groups except for the South Asians (Ontario) and Arabs (Quebec) is British Columbia. The second most frequently mentioned destination varies between Quebec (Chinese, Whites, South Asians, Blacks) Ontario (Chinese, Koreans, Blacks, Arabs) and Alberta (Filipinos, Aboriginals, Latin Americans and Japanese). The percentage of skiers and boarders going to other Canadian destinations is relatively small

Other destinations include the US and Europe. Approximately 1/3 of Blacks, Latin Americans and Japanese say they will visit one of these international ski destinations in

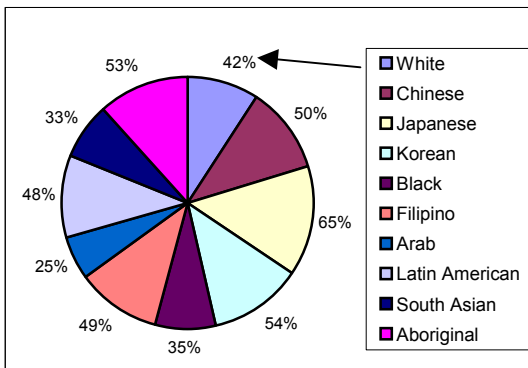
Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

the current year. About ¼ of Whites, Filipinos and South Asians will visit and international destination. The Eastern US is slightly more popular (6%) among all skiers and boarders than the Western US (4%) and Europe (2%).

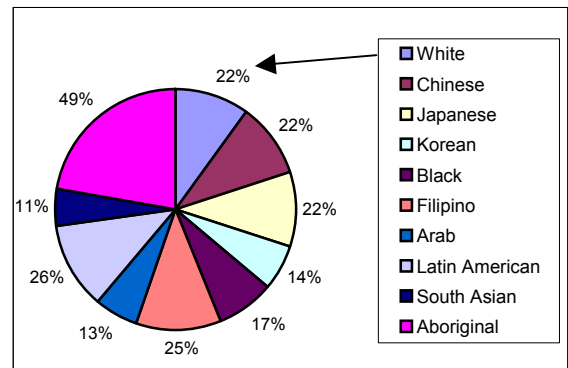
If participation rates were the same in all provinces, then the provinces with higher populations would have more skiers and boarders. However, this is not the case. This research shows more White Quebec skiers and boarders than live in Ontario. There are more Chinese and Japanese skiers and boarders residing in BC, but fewer Blacks, Latin Americans or Arabs. Ontario has the largest percentage of Koreans, Blacks, Filipinos and South Asians. Quebec has the highest percentage of Arabs, as well as Whites. Alberta has the highest percentage of Aboriginal skiers and boarders.

The following four charts show the proportion of each ethnic group of skiers and boarders expecting to ski or board in each of the major provinces.

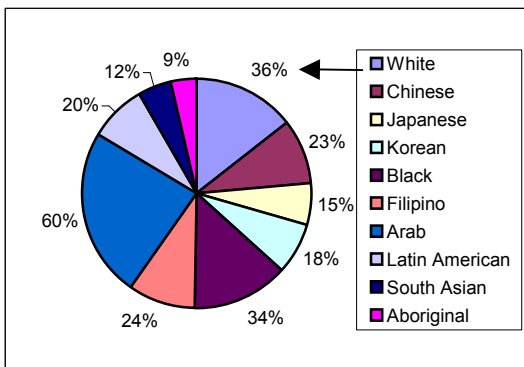
**Chart 13 – British Columbia**



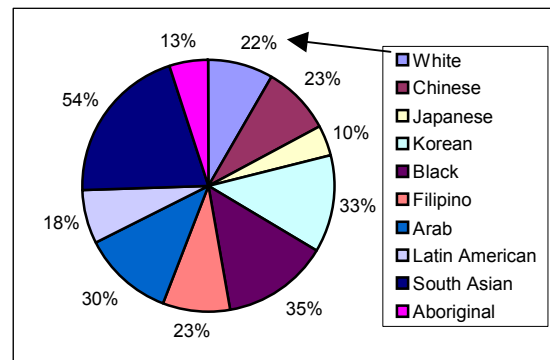
**Chart 14 - Alberta**



**Chart 15 - Quebec**



**Chart 16 - Ontario**



The correct way to read these charts is that the number shown for each ethnicity is the percentage of that ethnicity that says they will be (or have) skiing or boarding in each of the provinces. Because they can select multiple destinations, then percentages for each ethnicity add up to more than 100%. In Quebec, 36% of White skiers and boarders say they will ski or board in that province and 22% of White skiers will ski in Ontario.

Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

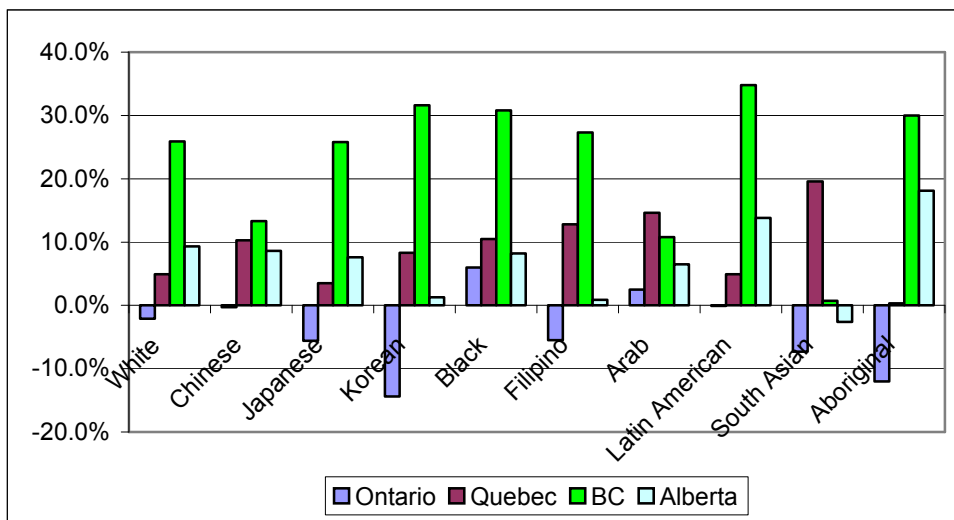
Despite the variances in the South Asian and Latin American markets on the percentage of respondents on overnight trips, there appear to be few differences between the ethnic groups and White skiers and boarders on the use of overnight ski trips. It is more likely that any differences can be explained more by where the majority of the ethnic groups live in relation to ski areas than by differences in ethnicity.

While it seems evident that there would be a relationship between which province skiers and boarders live in, and where they plan on skiing and boarding in a year, there certainly appears to be evidence of travel to other provinces to ski and board among some ethnicities. As an example, only 36% of Chinese skiers and boarders live in BC, but 50% of all Chinese skiers and boarders say they will ski or board in BC, representing a net gain for the province from this ethnic group. BC consistently draws skiers and boarders from other provinces across all ethnic groups except for the South Asian.

This works in reverse in Ontario. Ontario has 23% of the population of Chinese skiers and boarders, and 23% of all Chinese say they will ski or board in Ontario, so there is no additional net gain from Chinese in other provinces. Ontario has 47% of Korean skiers and boarders living there, but only 33% of Korean skiers and boarders say they will ski or board there. This represents a net loss to Ontario within this segment. Thus within each ethnic segment, there appear to be destinations that are more attractive than others, perhaps even more than the province in which they live.

The following chart shows the net gains and losses for each province by each ethnic group.

**Chart 17 – Net Gains and Losses Among Ethnic Groups for each Province**



Based on this information, BC has significant net gains from ethnic markets (and by Whites), with Quebec showing smaller gains in most ethnic markets and Alberta gaining in a few ethnic markets.

## 6 Conclusions

This report identifies that there are significant<sup>7</sup> differences between the ethnic groups such that they cannot be treated as a homogenous group, or necessarily as similar to White skiers and boarders. While they undoubtedly have many attitudes in common, such as why they decide to ski or board, the differences in the demographic profiles will probably prevent the development of common marketing strategies. In addition, the earlier reports in this series suggests that language, religion and family values will create additional differences, beyond demographics, between the ethnic groups, and with White skiers and boarders.

One commonality though, is that the ethnic skiers and boarders are younger than White skiers and boarders. This leads to a number of other factors, such as the much greater participation in boarding by ethnic groups, their greater use of lessons and rental equipment. In addition, ethnic groups (aside from Latin Americans) have lower household incomes than do Whites, probably due to the higher number of youth and singles.

If the entire sample were controlled for age, it is entirely possible that there may be few differences between those ethnic groups with younger age distributions and Whites. The Chinese are close to Whites in median age (27 vs. 29) and have a similar household income distribution. The South Asian segment is also close to White in median age (30 vs. 29) and has a much higher percentage living in households with incomes over \$50,000 (64% vs. 48%).

There are a number of ethnic groups that have a large percentage of skiers and boarders from outside Canada. While about 20% of White skiers and boarders at Canadian ski areas are from outside Canada, there is a much higher percentage of visitation by some ethnic groups, such as the Japanese, Latin Americans and Blacks. This suggests that international ski marketing programs need to consider this ethnic mix and ensure that they are not just marketing a "Caucasian" product.

The data in this report leads to the conclusion that ethnic markets are important to all provinces or regions, but are more important to some regions, and that the ethnic mix in each province is different. This suggests that marketing programs may be developed on a national basis for specific ethnicities, but the application of the programs, or individual tactics, may need to be developed regionally. These would be based on the establishment of priority target markets for each region as the percentage of some ethnic groups of skiers and boarders is too small to warrant investment.

The concept of the relative attractiveness of different regions to specific ethnic groups will help to establish these target markets. Ontario in particular is losing ethnic skiers and boarders to other regions. If there is a sufficient base of skiers and boarders, tactics that encourage skiing and boarding in the Province may have greater provincial return than tactics that encourage the development of new skiers and boarders within ethnic groups.

This report has largely used data obtained from new analysis of the 2003/04 Skier Survey. This particular year was chosen as it included the broadest range of ethnicities

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<sup>7</sup> Not in a statistical sense

Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile

and was more compatible with 2007 PMB data and will match up better with the planned 2007/8 Skier Survey. However, although there is some compatibility between the PMB data and the Skier Survey, there is no comparability due to the differences in methodology.

There are also inherent weaknesses in the Skier Survey methodology that will continue to pose issues comparing data on a year to year basis. These issues include:

- Lack of a consistent sample of ski areas as they opt in and out of the survey process annually. This probably has a limited impact on “national” level data but will have a more significant impact on data when it is broken down into provincial samples.
- The survey design has changed with improvements in technology and ski areas are provided with guidelines in administration of the survey, but the methodology can vary between and within areas depending on staff assigned to the project and to individual circumstances at areas.
- The questionnaire has changed on an annual basis, and although many questions remain consistent year to year, there is still change.

However, there are considerable benefits to the Survey:

- It provides information on skiers and boarders that couldn't be obtained in any other cost effective fashion.
- It has a large sample size that allows breakdowns to regions and is weighted to skier visits.
- It allows flexibility in adding questions of direct relevance to the industry.

The PMB survey is based on professionally completed household interviews. It has a relatively large sample (25,000) that includes both skiers and non-skiers and boarders. This makes the sample size of skiers and boarders much smaller than the Skier Survey. Because it includes both participants and non-participants, it is possible to obtain participation rates of different segments of the population, and compare information between current participants and non-participants and all Canadians.

Given the strengths and weaknesses of each of the surveys, the PMB Survey is best used for tracking changes in participation, obtaining information on the size of the total markets and sub-markets such as provincial or city breakdowns, or ethnicity. However, the demographic content is limited, particularly in regard to ski and boarding participation. Thus the strengths of the Skier Survey are in providing more detail about skiers and boarders on an annual basis. This approach is demonstrated in Chart 4 that used information on the size of the overall market from the PMB data, and the provincial distribution of ethnic groups from the Skier Survey.



Ethnic Communities Participation in Skiing and Boarding  
Ethnic Skier and Boarder Profile