

ETHNIC COMMUNITIES PARTICIPATION IN SKIING AND BOARDING

BARRIERS TO PARTICIPATION

REPORT #4



1 Introduction

This report is the fourth in a series of reports prepared by the Canadian Ski Council (CSC) 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; an analysis of data from the Print Measurement Bureau on ethnic participation in skiing and boarding and a re-analysis of data available in the Annual Skier and Boarder Surveys conducted by the CSC at ski areas in Canada.

This survey was commissioned by the CSC to develop information on both skiers/boarders and non-skiers/boarders, of different ethnic backgrounds. Most of the research undertaken by the CSC has been on the skier/boarder market and other than a comparison to the Canadian population contained in the Print Measurement Bureau (PMB) data, information on the differences between those who skied or boarded in the past year versus those who didn't has not been available. One of the primary purposes of this research was to try and identify the reasons why non-skiers/boarders had not done so, and if there were any differences among ethnic groups in these reasons.

The data was obtained from an Ipsos Reid On-Line Panel. Research companies have developed methodologies to undertake market research through the internet as a much less expensive methodology than traditional telephone surveys. Respondents are recruited to take part in a panel of those who are prepared to take part in on-line surveys. They provide basic demographic information about themselves so that they can be screened if required. The national panel used by Ipsos Reid includes 23,000 individuals. For the purposes of this project, Ipsos Reid used a sample of those living in the Greater Toronto Area. The GTA was the focus of this particular project as it was felt to be the most important market from an ethnic perspective. The projected sample size was to be 1,000 individuals, but a total of 1,320 individuals responded to the questionnaire. The survey took place between December 10 and 14, 2007.

While on-line surveys are considerably less expensive and much faster, they are not representative of the total population. Participation in the panel requires a computer, and although approximately 80% of Canadians own a computer or can access the internet, the panel does skew towards higher income and younger age groups. This was not felt to be a problem for this study, as it more closely represents the target market for skiing and boarding. The sample was weighted by Ipsos Reid to represent the known profile of the panel.

The Survey included 4 questions of relevance to the CSC needs.

1. In the past 12 months, how many days have you gone skiing or boarding?
2. What is your ethnic background?
3. (For skiers and boarders) How would you rate each of the following as a reason why you don't ski or board more?

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4. (For non-skiers and boarders) How would you rate each of the following as a reason why you don't participate in skiing or boarding?

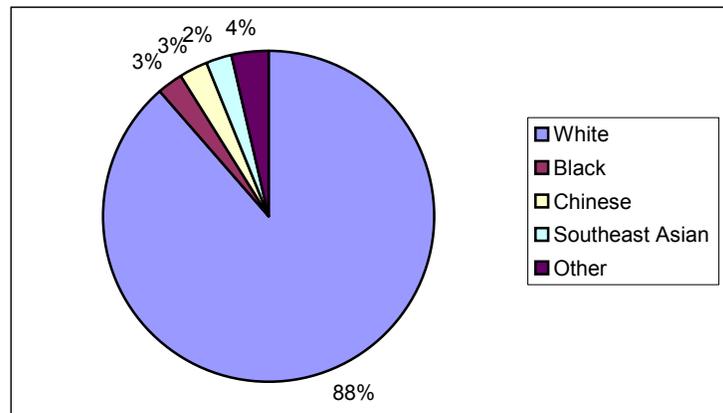
Each of these was then cross tabulated with the demographics of the respondents, including gender, age, income, household status and education.

2 Demographics

The survey included 7 ethnicities in the category of responses. Given the limited sample size, and the small percentage of some ethnic groups, it was expected that only a few ethnic groups would show up with to any extent in the sample.

Chart 1 – Ethnicity

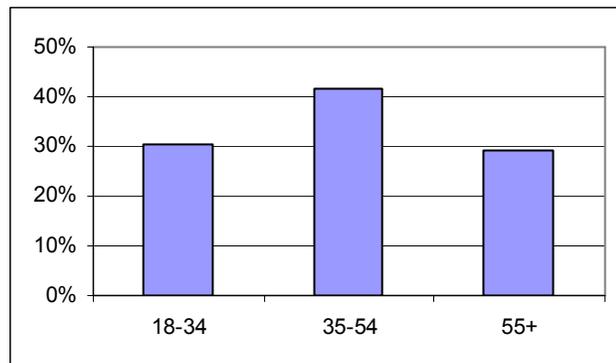
Chart 1 shows the percentage of the different ethnic groups found in the sample. In addition to the 5 shown here, Latin Americans and Other Asians were included in the responses, but the sample were too small to include in the analysis (2 Latin Americans and 8 Other Asians). These do not affect the overall analysis.



The percentage of whites (88%) shown in this survey and the percentage of ethnics (12%) are slightly different than found in PMB data where whites form 84.7% of their sample. As a comparison, Blacks represent 2.1% (vs. 3%), Chinese 3.1% (vs. 3%) and Southeast Asian¹ 1.1% (vs. 2%) of the PMB sample. Part of these differences can be explained by the difference in the origin of the sample, as the PMB data is a national survey and this survey is of the GTA market.

Chart 2 - Age of the Sample

The sample is 47% male and 53% female. Just over ¼ (28%) of respondents live in households with children and 78% live in households without children. Most (40%) of the sample are between the ages of 35 and 54, while the percentage of the youngest age segment is about the same as that of the 55+ age segment. This shows that the sample does not over represent youth, as might be expected from an



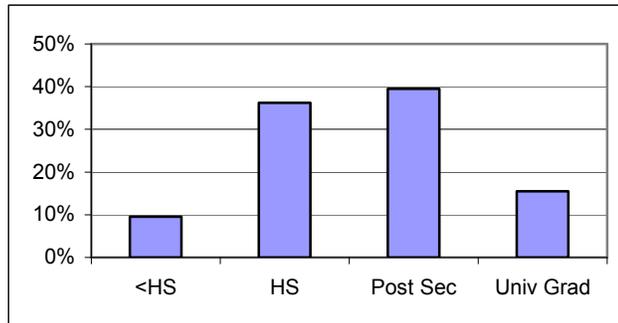
¹ Southeast Asian includes India and Pakistan

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on-line panel.

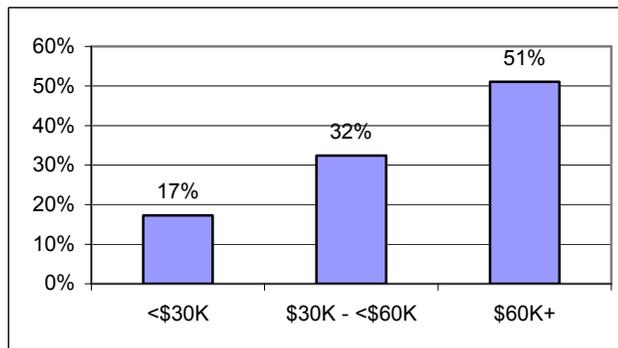
Most of the sample is well educated, with 55% having some post secondary education. This is much higher than education levels found in PMB data, which shows that 40% of the Canadian population has some post secondary education. Among skiers and boarders², 45% has some post secondary education and 34% has at least a bachelors degree.

Chart 3 – Education Levels



The categories used for income levels do not match up with those used in the PMB and the Demographic Surveys. However, like these other surveys of skiers and boarders, the sample has high household incomes, with over 1/2 living in households with incomes over \$60,000 per year.

Chart 4 – Income Levels



3 Ski and Boarding Participation

This survey found a significantly lower participation rate in skiing and boarding – 5.9% of those responding indicated that in the past 12 months they had gone skiing or boarding – than the approximately 13% found in PMB data for the Toronto area. The PMB survey is a household survey that provides information on all members of the household that may explain the very different participation rate.

The skiers and boarders in this survey participated an average of 5.7 times in the previous 12 months. Thirty eight percent had participated 1 – 2 times, 50% had participated 3 – 10 times and 12 percent more than 10 times. In comparison, the CSC Demographic Survey results show that 45% had participated 1 – 2 times, 35% had participated 3 – 10 times and 20% had participated more than 10 times.

There are some demographic differences between skiers/boarders and non-skiers/boarders. Some of the differences and similarities are:

² From 2006 PMB data. The PMB survey also uses the frequency of participation in the past 12 months.

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- Skiers and Boarders are more likely to be in the high income range (\$60k +) and less likely to be in the middle income range (\$30 k to \$60k). 78% of skiers/boarders are in the \$60k + household income category
- The presence of children in the household was no different between the two groups. 63% of skiers/boarders live in households without children.
- Far more likely to be in the 18 – 34 year age group than non skiers/boarders and far less likely to be in the 55+ age group. 52% of skiers and boarders in this sample are in the 18 – 34 year age segment and most of the balance are in the 35 – 54 age segment.
- Far more likely to have higher education levels. The higher the education level, the more likely they were to participate. 11% of university graduates participated and 7% of those with post secondary education were participants. There are no skiers/boarders in the sample with less than high school education and only 22% with high school education. 46% of skiers and boarders have post secondary education and 31% are university graduates
- There are more male skiers/boarders (60%) in the sample than females

4 Barriers to Skiing and Boarding for Ethnic Groups

The participation rate of skiing/boarding varies within the ethnic groups, but given the small sample sizes, the differences are not statistically significant.

Table 1 – Participation Rate of Ethnic Groups

| Whites | Blacks | Chinese | Southeast Asian | Other |
|--------|--------|---------|-----------------|-------|
| 5% | 5% | 12% | 10% | 4% |

The higher (than White) participation rate of Chinese is confirmed by the data available from the PMB survey, although the rate is lower than the PMB survey (17%). The higher participation rate of Southeast Asians is not confirmed by the PMB survey, which shows the participation rate of Southeast Asians to be about the same as that for Whites (approximately 16%).

A major objective of this study was to determine the barriers to participating in the sport among ethnic groups. To do this, respondents were asked to rank the importance of 6 different factors on a scale of 1 to 5, with 5 being “very important”. The following table shows the results of this for the 4 major ethnic groups and Whites. There are no statistically different ratings on any of the barriers between any of the ethnic groups (primarily due to the small sample sizes).

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Table 2 – Barriers to Ethnic Groups

| | White | Black | Chinese | Southeast Asian | Other |
|--|-------|-------|---------|-----------------|-------|
| Too expensive | 3.1 | 3.1 | 3.4 | 3.6 | 3 |
| I don't like being out in the cold | 2.8 | 3 | 2.7 | 3 | 3.1 |
| Not enough leisure time | 2.7 | 2.3 | 3.2 | 3.3 | 2.8 |
| Don't have any friends or family who participate | 2.7 | 3.1 | 2.5 | 3.5 | 2.4 |
| Too difficult to learn | 2.4 | 2.3 | 2.3 | 2.8 | 2.3 |
| My religion or culture discourages participation in sports | 1.2 | 1.3 | 1.1 | 1.6 | 1.2 |

The most important barrier for all groups was that the sport is perceived to be too expensive. The Chinese and Southeast Asians regarded it as a more important factor than the other groups. The second most important factor varied between the groups. Not having friends or family who participate was the second most important factor for Blacks and Southeast Asians while not having enough leisure time was the most important factor for Chinese.

Not being out in the cold was also an important factor for all groups. It ranked first for Other Ethnicities, second for Whites and Other ethnicities, and third for Blacks and Chinese, and fourth for Southeast Asians. That the sport is too difficult to learn was the fifth most important factor for all ethnicities.

Media reports have indicated that religion or culture may be an important factor in taking up sports, particularly for Muslims. This research confirms this to some extent, as Southeast Asians (who are most likely to be Muslims) rated it as more important than the other groups. However, the Southeast Asians also rated it as having low importance, and based on this study, it should not pose a significant barrier to taking up the sport.

Among the 4 ethnic groups, the differences between their ratings of importance and Whites are not significant, except for Southeast Asians. They rank “not having friends or family who participate”, “too difficult to learn” and “too expensive” as more important than the other ethnic groups and Whites. This suggests that Blacks, Chinese and Other Ethnic groups are similar enough to Whites that special actions need not be taken to overcome barriers, but that additional consideration should be given to Southeast Asians.

The use of mean (or average) scores sometimes hides the depth of feeling about an issue on the part of some of the sample. To overcome this, it is common to determine the percentage of the sample who strongly agree with the statement. The following table shows the percentage of individuals in each ethnic group who agree strongly³ that the particular barrier is an important one.

³ By giving it a 4 or 5 out of 5 in importance

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Table 3 – Importance of Barriers to Ethnic Groups

| | Whites | Blacks | Chinese | Southeast Asian | Other |
|-------------------------|--------|--------|---------|-----------------|-------|
| Too expensive | 47 | 52 | 59 | 58 | 44 |
| No friends or family | 33 | 48 | 32 | 54 | 29 |
| Not enough leisure time | 33 | 17 | 40 | 49 | 42 |
| Too difficult to learn | 24 | 19 | 13 | 31 | 21 |
| Culture or religion | 3 | 0 | 0 | 13 | 0 |
| Too cold | 36 | 43 | 25 | 35 | 48 |

For Blacks, over ½ feel strongly that expense is a barrier, followed by not having any friends or family to participate with and that it is too cold.

Expense is also the most important barrier for most Chinese, but all the other barriers, except for lack of leisure time are less important for Chinese than for Whites. Fewer Chinese have concerns about it being too cold or being too difficult to learn than any other ethnic segment.

Southeast Asians also feel strongly that expense is a barrier, but not having friends and family who participate is seen as a barrier by nearly the same percentage of respondents. The highest percentage of Southeast Asians also feel that not having enough leisure time is important. This is also the only group that religion and culture are a barrier for. It appears as though more Southeast Asians have more barriers to participating than any other ethnic group.

More “Other” ethnic group respondents have a concern about the sport being too cold than any other segment, followed by it being too expensive.

5 Barriers to Starting Skiing and Boarding

Table 4 – Barriers to Participating

This table shows the average scores for each of the barriers to participation among the 94% of the sample who did not participate in skiing or boarding in the past 12 months. The perception of expense is expected, but it is followed by the perception that the sport is too cold to participate in. The lack of family and friends and not having enough leisure time were also of concern.

| | Avg. Rating |
|-------------------------|-------------|
| Too expensive | 3.1 |
| Too cold | 2.8 |
| No friends or family | 2.7 |
| Not enough leisure time | 2.7 |
| Too difficult to learn | 2.4 |
| Culture or religion | 1.2 |

The data also provides information on the barriers to participation in different groups defined by demographic variables. Among these are:

- There are no differences in the ratings given to the barriers between those living in households with different income levels. The only exception to this is that those living in higher income households rate “too expensive” slightly lower than those living in lower income households.
- There are differences in the ratings given to the barriers between those living in households with children and those without children. Households with children rated

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“too expensive” and “not enough leisure time” more highly than did households without children, while households with no children rated “don’t like being out in the cold” higher.

- “Too expensive”, “not enough leisure time” and “don’t have family and friends who participate” all declined in importance with age.
- Among 18 to 34 year olds, the most important barriers are “too expensive”, “not enough leisure time” and “don’t have family and friends who participate”.
- Among the 4 groups defined by education levels, those who were university graduates rated “not enough leisure time” and “don’t have any friends or family who participate” as more important factors than those with lower education levels, particularly those with less than high school education. There were no differences between the groups found in the two most important factors, “too expensive” and “don’t like being out in the cold”.
- Females rated all of the mentioned barriers as more important than males.

5 Barriers to Skiing and Boarding More Often

Table 5 – Barriers to Participating More Frequently

With the small participation rate found in this survey (5.9%), the sample size of skiers and boarders is too small (n= 74) to break into ethnic groups. Table 2 shows the mean scores in importance of six reasons for not skiing or boarding more frequently. The two most important are the same as those barriers to non skiers/boarders – “not enough leisure time” and “too expensive”. Among non skiers/boarders, “too expensive” is more important, but as these respondents already have participated, it would be expected that expense is less of an issue, as they have already overcome that barrier, and consequently, time is more of a barrier.

| | |
|--|-----|
| Not enough leisure time | 3.5 |
| Too expensive to go more | 3 |
| Too far to go to areas | 2.9 |
| Don't have any friends or family to go with | 2.2 |
| It's too difficult | 1.6 |
| My religion or culture discourages participation in sports | 1.1 |

Similarly, as these respondents have also taken up the sport, not having any friends or family is of lower importance as a barrier than with non-skiers/boarders.

A barrier which does arise among this sample of GTA skiers and boarders is that it is “too far to go to areas”, which rates nearly as highly as “too expensive”. The closest ski areas to the GTA market are 1 – 2 hour drives (depending on where the respondent lives in the GTA) so that this could be seen as an important issue, particularly given that poor weather or heavy traffic can add considerably to the travel time.

The following observations can be made about the differences between demographic groups:

- The higher the income, the greater the importance of not having enough leisure time.
- Those without children say that not having friends or family to go with is a more important barrier.

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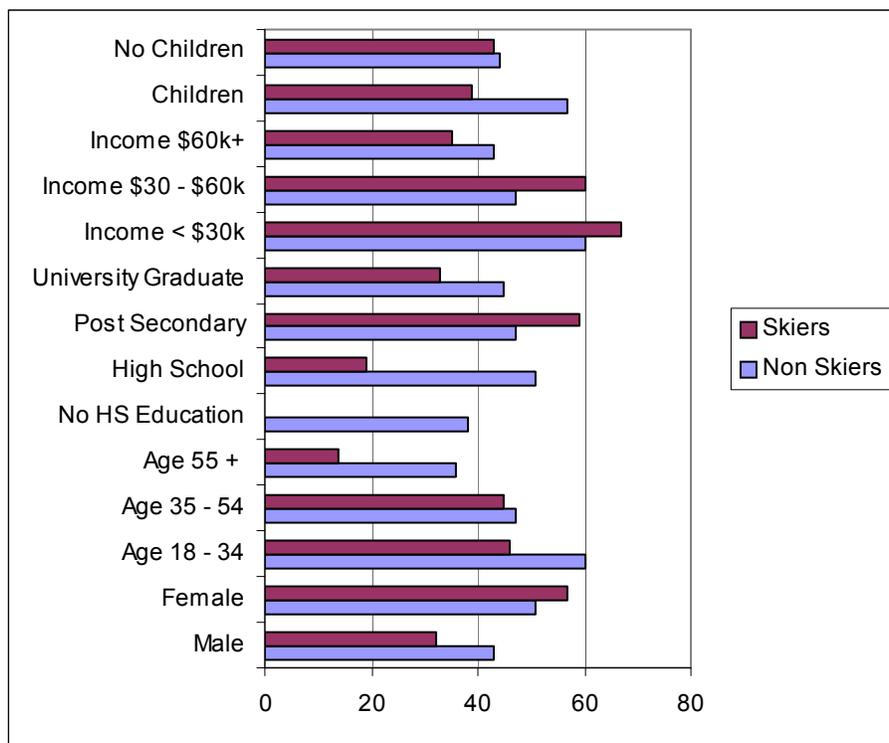
- The youngest age segment rates not having enough leisure time more highly as a barrier than do the older age segments. Expense is less of a barrier to the 55+ age segment.
- Expense is more of a barrier to those with post secondary education, while for university graduates, lack of leisure time and distance to areas (probably these two are connected) are more important barriers to participating more.

6 Expense as a Barrier to Participation

This research shows that expense is the major barrier to both taking up the sports of skiing and snowboarding, or participating more frequently. As shown in some of the preceding information, its importance varies to some extent between different groups.

The following Chart shows the percentage of respondents in each of the demographic groups who indicate that “too expensive” is of high importance.⁴

Chart 5 – Importance of Expense as a Barrier



On average, about 46% of all respondents indicated strong agreement that expense was a barrier to participating, or participating more frequently. Demographic segments which indicated stronger agreement (a higher percentage saying it was a strong barrier) include:

- Female skiers/boarders

⁴ By rating it a 4 or a 5 on the scale of 1 to 5.

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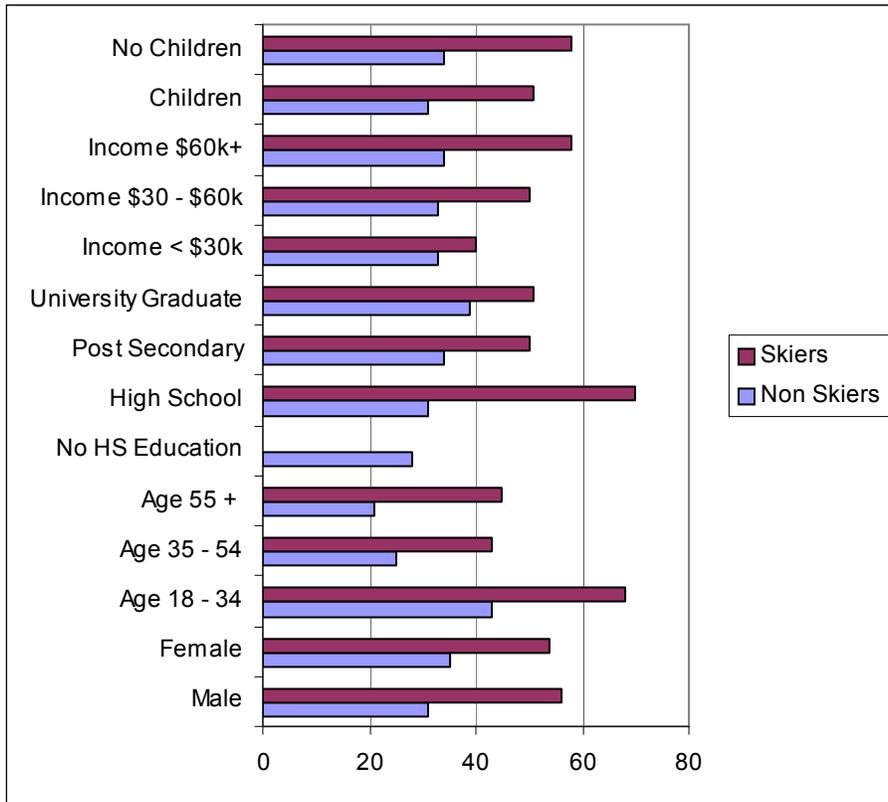
- Young non skiers/boarders
- Low income skiers/boarders and non skiers/boarders
- Middle income skiers/boarders
- Non-skiing/boarding households with children
- Skiers who have high school education

Most of the segments that indicated that expense was a barrier are those which would be expected to have lower disposable income. It is interesting to note that there are many segments who currently are skiers/boarders that are as likely to indicate expense as a barrier to participating more as non skiers/boarders. This indicates that they have tried the activity, determined the cost and are unable to participate as much as they would like. Non-skiers/boarders are using the perception of the cost as a barrier.

7 Lack of Leisure Time as a Barrier to Participation

The lack of leisure time was probably of second importance as a reason why both non skiers/boarders and current skiers/boarders did not participate to a greater extent. Generally, skiers/boarders felt that lack of time was a more important barrier than non-skiers/boarders. The following Chart shows the percentage of respondents in each of the demographic groups who indicate that “not enough leisure time” is of high importance.

Chart 6 – Importance of Lack of Leisure Time as a Barrier



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Demographic groups which had a higher percentage of respondents who felt that lack of leisure time was important include:

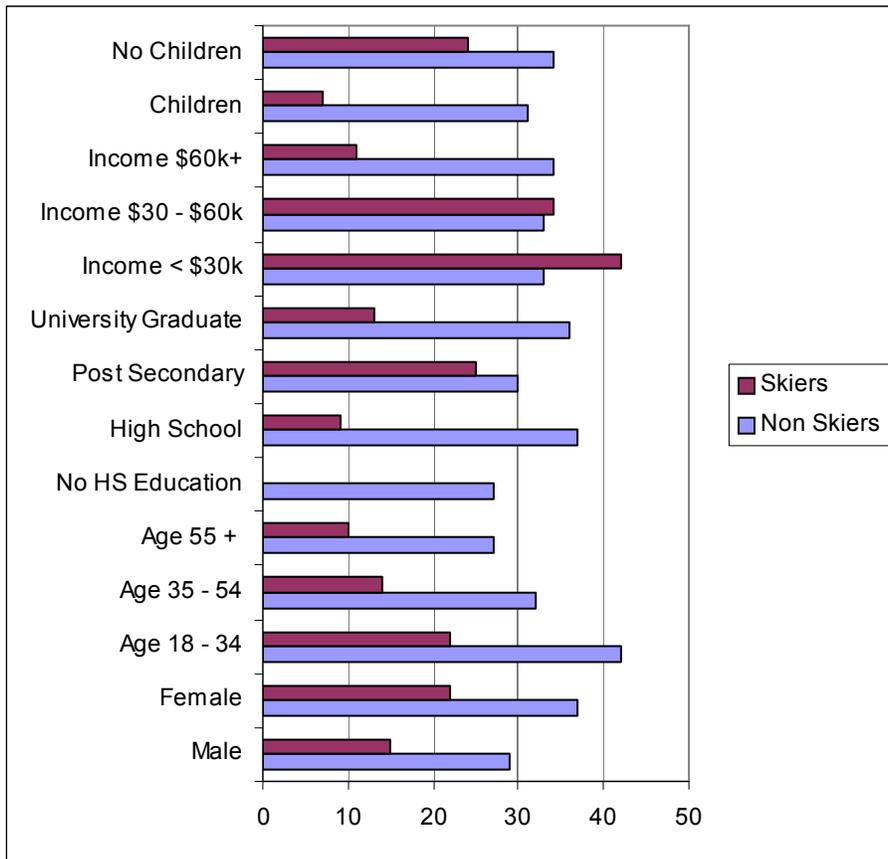
- Skiers with children at home
- High income skiers
- High school graduate skiers
- University graduate skiers and non-skiers
- Both skiers and non-skiers in the 18 – 34 age group

For all of the demographic groups of non-skiers/boarders, expense was a more important barrier than lack of leisure time. Among skiers, the importance of leisure time increased with household income, but not necessarily with age or education.

8 Lack of Friends and Family as a Barrier to Participation

The lack of friends and family to participate with was of third importance as a barrier to most of the ethnic groups. Skiing and boarding is a non-competitive social activity and being with a group of friends and family enhances the enjoyment. In some cases, it poses an additional barrier by inhibiting travel to areas. The following chart shows the percentage of skiers and non-skiers who say that not having friends and family to ski with is a barrier.

Chart 7 – Importance of Friends and Family as a Barrier



Most demographic segments of non-skiers/boarders feel this is a more important barrier than current skiers/boarders.

Demographic segments who have a higher percentage of respondents saying this is a barrier are:

- Low and middle income skiers/boarders
- Skiers with high school education
- Skiers with no children at home
- Among non-skiers/boarders, the importance decreases with age, so is therefore a greater concern to the 18 – 34 age segment

9 Conclusions

This project is the first time that this survey methodology has been used by the CSC. It is cost-efficient and very timely, but the results are coloured by the nature of the population that the sample is derived from. To qualify, individuals need to have access to the internet, have to find a way to sign up for the panel, and have to volunteer to participate in each of the studies they participate in. One of the advantages of this approach is that the sample can be targeted to refine it by age or income, which would increase the likelihood of picking up skiers and boarders in the sample. However, the panel is not representative of the population. In the case of this study, the panel is under-represented with ethnic groups and also appears (based on the PMB results) under-represented with skiers and boarders. The lower percentage of ethnic group representation would be expected with this methodology, but the lower percentage of skiers and boarders is not. Whether this methodology is used again will require further discussion.

As noted, the percentage of ethnic groups was lower than expected, resulting in smaller sample sizes. However, it is likely that this would be the case in almost any research study, (except for the PMB survey which uses household interviews and language trained interviewers) where language will be an issue. Regardless, as a first attempt to reach ethnic individuals who are not skiers and boarders, the research has pointed out some useful directions.

Section 4 suggests that there are differences between the ethnic groups and Whites in the importance of different barriers to participation. Generally, more ethnics say that the barriers to participation are greater than do Whites. Thus they have greater barriers to overcome than do Whites in starting to participate in the sport. Some barriers are common to all groups – expense and lack of leisure time and these tend to be the most important for all ethnic groups. The other barriers listed tend to be of more importance to the ethnic groups, possibly because skiing and boarding are not part of their culture or family experience. As the largest ethnic groups come from warmer climates, snow and cold are foreign to their experience and it is not likely that there would be family participation and support until second or third generations have been in Canada.

Southeast Asians have the greatest barriers to participation to overcome. Approximately ½ say that it is too expensive, have not enough leisure time, and don't have family or friends to participate with. Approximately 1/3 say it is too cold or too hard to learn. As was expected, 13% say they have cultural or religious barriers that prevent participation.

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Given the strength of these barriers and the difficulty of overcoming some of them, whether Southeast Asians represent a potential target market remains to be seen.

The exception to this is the Chinese. They are less concerned about the cold, and lacking friends or family who participate. This may be due to Chinese immigrants being a longer time period in Canada, where those interviewed are from second, third or fourth generations in Canada. As their participation rate is higher than that for Whites, and the barriers lower, the Chinese do not appear to be in need of special initiatives to increase participation.

Blacks fall between these two ethnic groups. Although they share concerns about expense and not having friends or family who participate, lack of leisure time is less of an issue. However, the cold is a more significant issue for them. As a large ethnic group in the GTA, Blacks may represent a market that has potential, and overcoming the perception (and sometimes reality!) of it being too cold may be something that can be overcome with marketing.

While not a primary objective of this research, it does provide an opportunity to examine these barriers and identify demographic groups of both current skiers/boarders and non-skiers/boarders who have greater concerns about them. As would be expected, younger age segments and those with lower household incomes are concerned about the expense. Those with higher education and higher household incomes are more concerned about a lack of leisure time.

While not asked of skiers and boarders, the statement that “I don’t like being out in the cold” is of importance to 37% of those surveyed who have not participated in the past year. This is something that is worthwhile addressing in marketing activities against new participants, as it may be an important factor in convincing newcomers to the sport.