



# CANADIAN SKIERS - UNDER THE MICROSCOPE

CANADIAN SKI COUNCIL  
NATIONAL MARKET SEGMENTATION STUDY

OCTOBER 2018

# Table of Contents



03

Preamble

04

Methodology

07

The Skier Market, in Numbers

14

Meet the Segments

Segments in a Nutshell 15

How to Read the Tables 16

The Newbie 17

The Digital Adventurer 22

The Idealist 27

The Familyski 32

The Passionate 37

The Socializer 42

Pals & Playgrounds 47

# Preamble



The Canadian Ski Council, founded in 1977, is the **central organization** responsible for the implementation of national, industry based promotions and marketing on behalf of the ski / snowboard industry. Its main goal is to **increase participation in recreational snowboarding, alpine and cross-country skiing in Canada** by encouraging more Canadians to participate in skiing/snowboarding.

**2.5 million skiers and snowboarders** get out on the slopes in Canada\*, but to ensure its growth, the ski industry needs to both increase the frequency of visitation among existing skiers/snowboarders, and continue to recruit new participants into the sport.



But all skiers are not the same. They express different needs, have different expectations of ski resorts and express their passions for the sport differently.

Uncovering the different profiles will allow you to **design and implement improved communication and marketing** strategies specific to each of the target segments.

This deck presents you with the detailed analysis of each skier persona as well as the methodological parameters of this project.

\* <https://www.skicanada.org/about-us/quick-facts/>

A wide-angle photograph of a snowy mountain landscape. In the foreground, a series of parallel tracks, likely from a sled or skis, lead from the bottom center towards the horizon. The tracks are set in a smooth, white snowfield. In the background, a range of rugged, snow-capped mountains rises against a clear, pale blue sky. The overall scene is serene and expansive.

# METHODOLOGY

# What We Did



## Data Collection

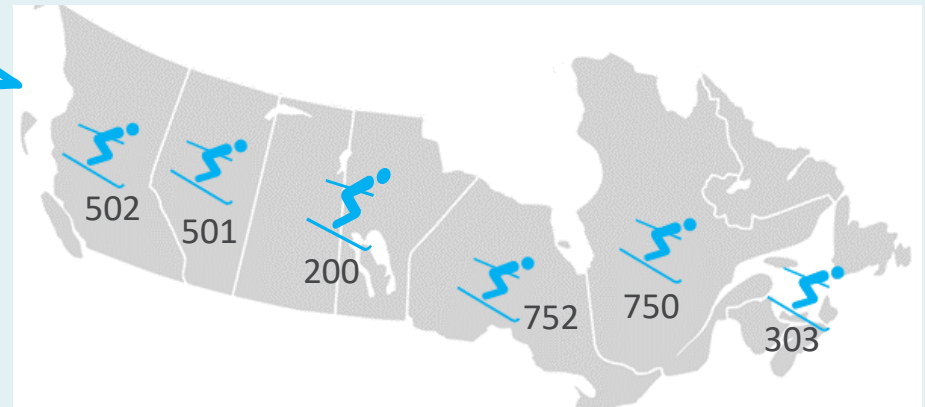


- Online Survey via Panel
- Period: June 13<sup>th</sup> to 26<sup>th</sup> 2017
- Questionnaire length : 18 minutes on average



## Target population

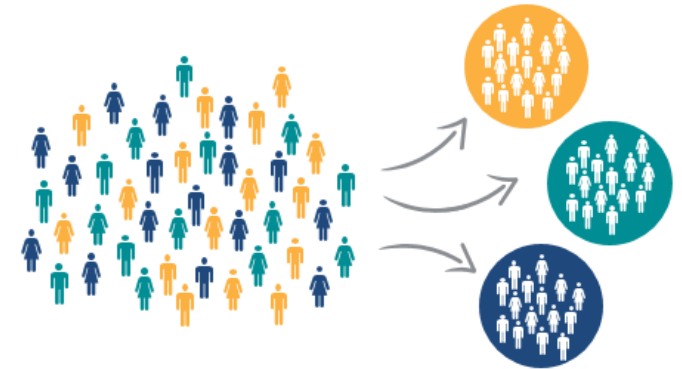
**3 008 skiers:**  
have skied or snowboarded  
at least once during the 2015-2016 or  
2016-2017 seasons



# A Few Words on Segmentation

**What is a Segmentation Analysis?**

Dividing people into distinct groups with distinct characteristics so as to target them with different marketing mixes.



**Why do a Segmentation Analysis?**

Segmentation is more than an insight or marketing tool: it is the guiding lens through which your business should be viewed.

Skier Segmentation will provide information on a number of areas, including...




Marketing Communications

Brand Strategy

Skier Experience

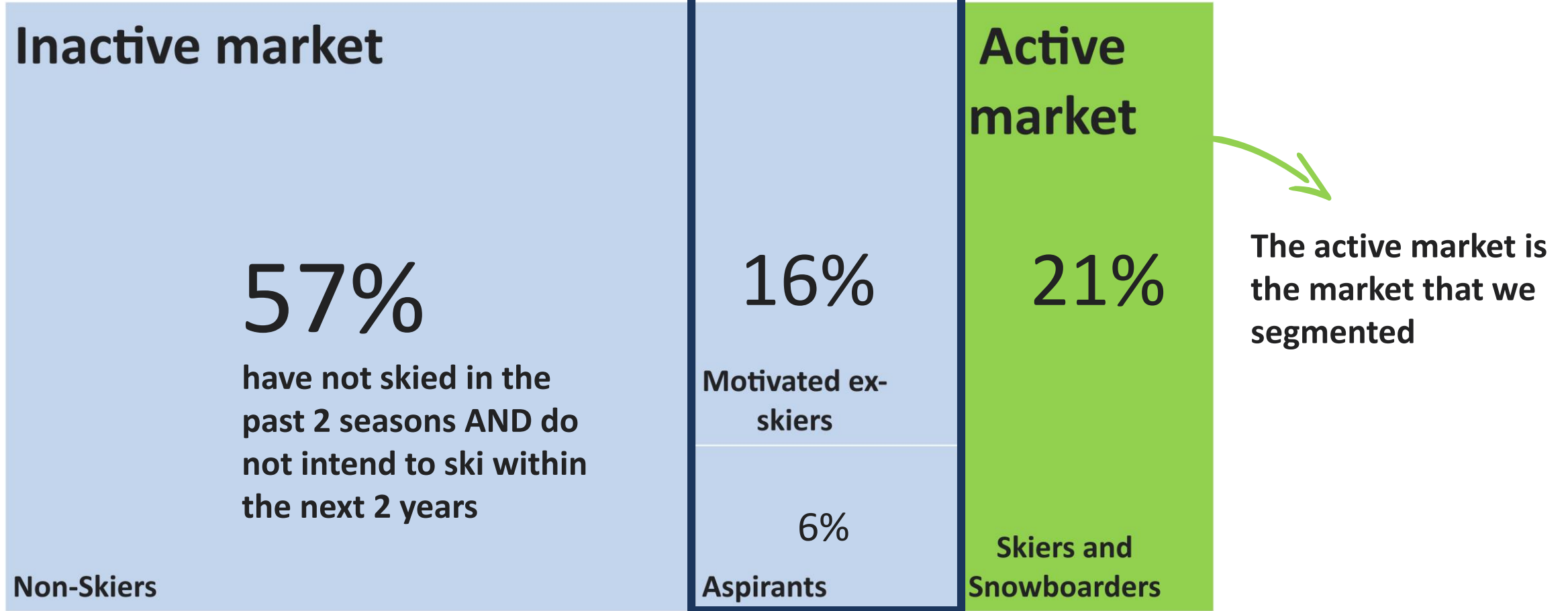
Skier Loyalty

New product Development



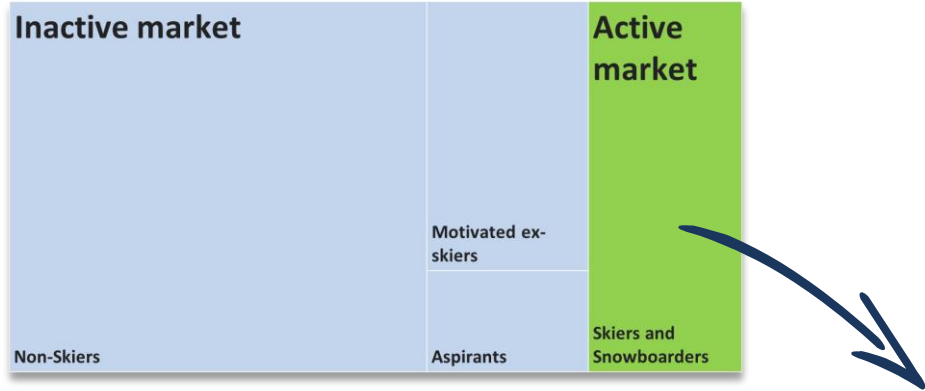
# THE SKIER MARKET, IN NUMBERS

# Market Portrait





# Market Portrait – per Region



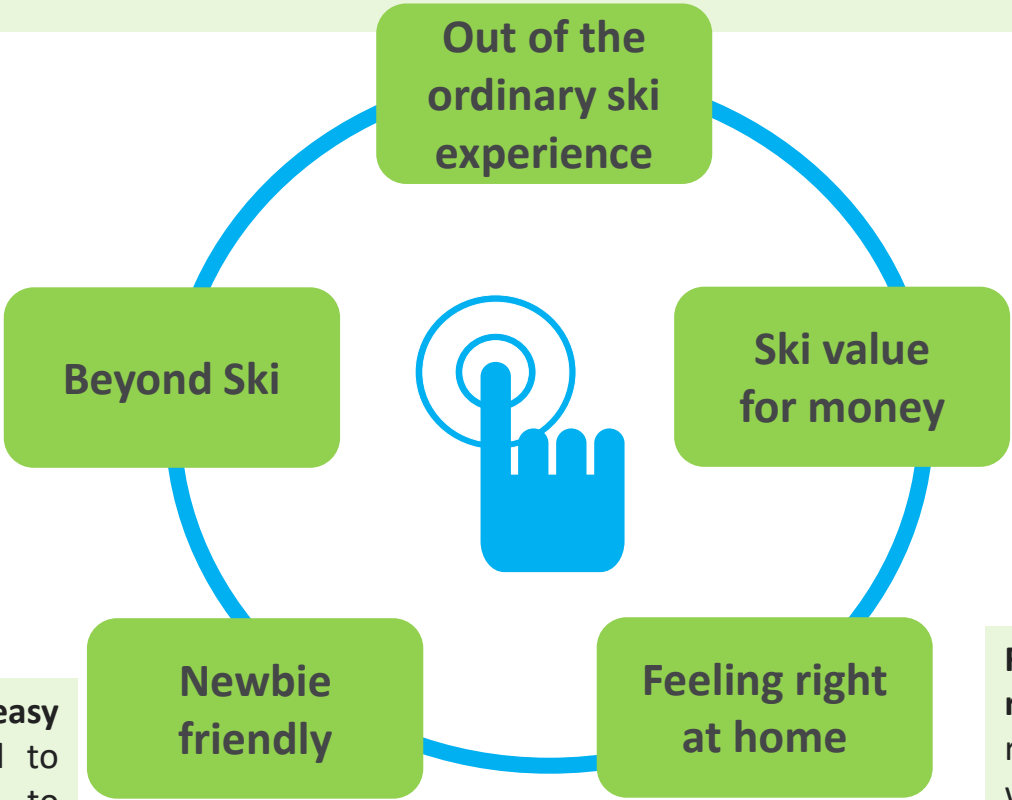
Per region	TOTAL	BC	Alberta	Prairies	Ontario	Quebec	Atlantic
Active market	21%	24%	29% <sup>+</sup>	15%	20%	19%	14% <sup>-</sup>
Inactive market	79%	76%	71%	85%	80%	81%	86%
Potential skiers							
Motivated ex-skiers	17%	17%	17%	19%	17%	17%	16%
Aspirant	6%	5%	3%	7%	6%	8%	7%
Non-skiers	57%	54%	51%	59%	57%	56%	63%

# What are the Skiers' Criteria when Choosing a Ski resort?

A resort that goes the **extra mile** to offer a **diverse and exciting ski experience**: haute-route/off-piste/backcountry, non-groomed and difficult slopes, snow/terrain park, and/or night skiing. This ski resort is **dynamic in its media presence** by advertising and being active on social media and blogs. **Appeal** and **challenge** apply well to those ski resorts.

In addition to skiing/snowboarding, a ski resort must offer **other elements to enrich the experience**. These are all services that help to improve the ski day: food choices, accommodation and activities nearby, state-of-the-art facilities, free Wi-Fi, on-site entertainment, social aspects /après-ski, etc.

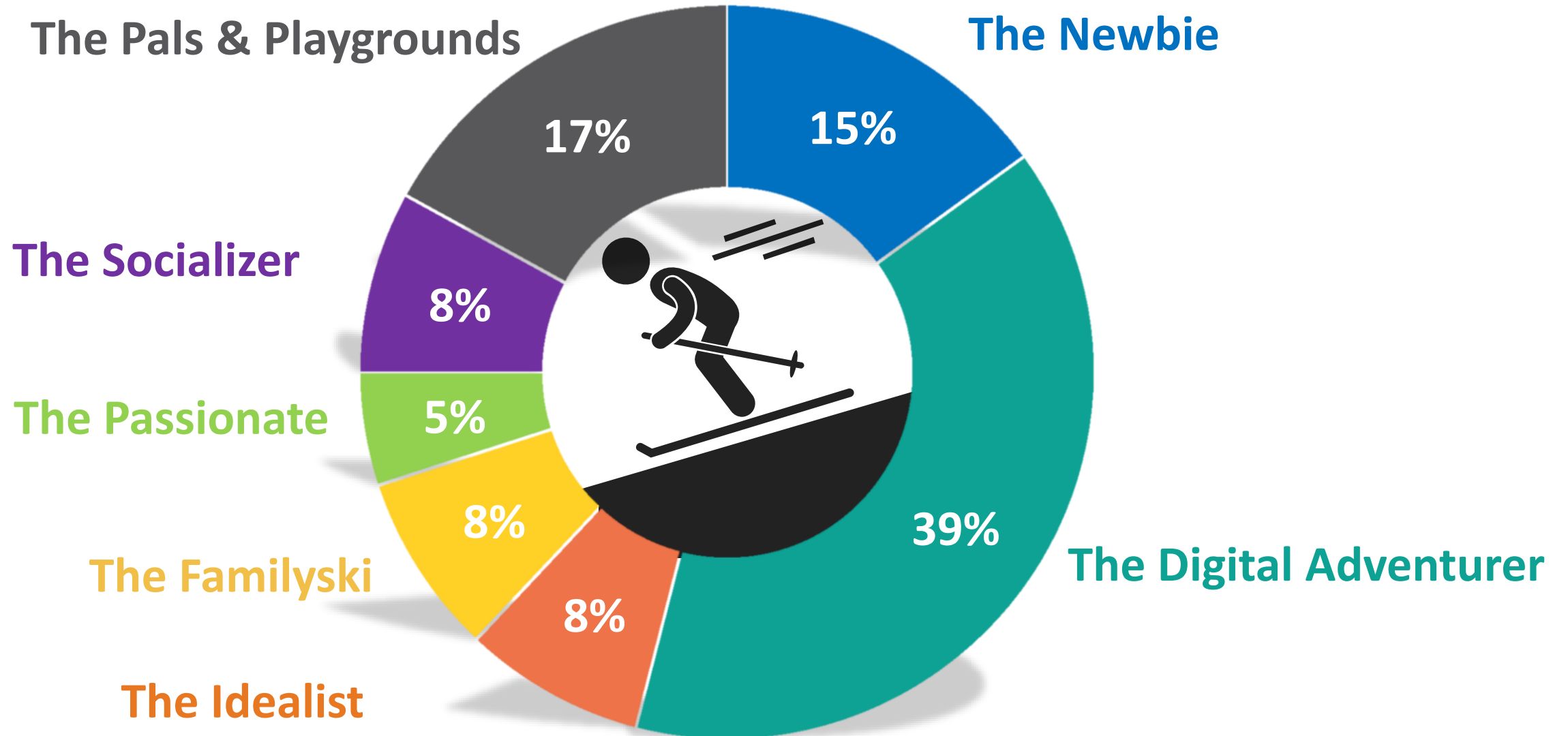
The resort has to offer enough **easy slopes**, a **learning area** restricted to beginners and **quality lessons** to facilitate the entry into the sport.



What matters is the **basic ingredients** of participating in skiing, such as the quality of the snow and the grooming of the slopes, a wide choice of slopes, limited traffic on the slopes and on the lifts. The friendliness of the staff also plays a role in the success of the visit. At the end of the day, the **core ski experience was worth the money** which was paid for the ski outing.

**Familiarity**, a **sense of belonging** and **reputation** of the resort are important. A resort with a **welcoming and dynamic vibe** will be more likely to be revisited.

# The 7 Skier Profiles that Stand Out

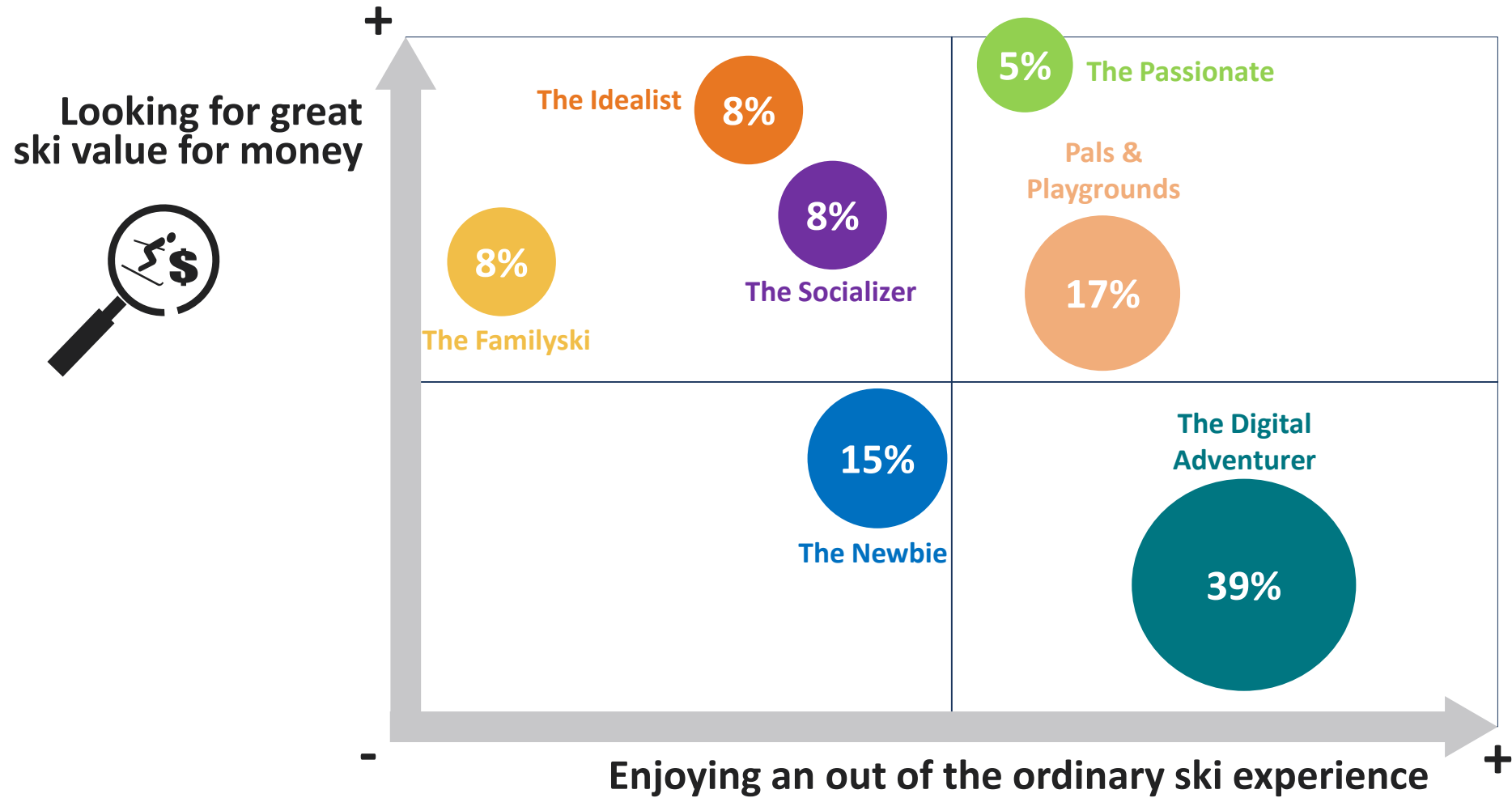


# Where are these Profiles found?

	TOTAL	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
<b>The Newbie</b>	15%	14%	15%	17%	15%	14%	19%
<b>The Digital Adventurer</b>	39%	36%	40%	51% <sup>+</sup>	44%	36%	36%
<b>The Idealist</b>	8%	8%	6%	1%	6%	13% <sup>+</sup>	5%
<b>The Familyski</b>	8%	8%	8%	8%	7%	8%	8%
<b>The Passionate</b>	5%	7%	8% <sup>+</sup>	1% <sup>-</sup>	3%	6%	2%
<b>The Socializer</b>	8%	9%	8%	5%	9%	8%	9%
<b>Pals &amp; Playgrounds</b>	17%	18%	15%	17%	16%	16%	22% <sup>+</sup>
	100%	100%	100%	100%	100%	100%	100%

# Mapping the Segments

On the 2 main criteria





**MEET OUR SEGMENTS**

# Meet the Segments – In a Nutshell



## THE NEWBIE



## THE DIGITAL ADVENTURER



## THE IDEALIST



## THE FAMILYSKI



## THE PASSIONATE



## THE SOCIALIZER



## PALS & PLAYGROUNDS

### Segment Profile

- Pushed by social circle
- Skis for fun
- Wants to feel safe
- Easy slopes, learning area, quality lessons
- Beyond ski: food, activities, services, facilities

- Enjoys unconventional skiing: non-groomed slopes, off-piste, terrain park.
- Wants to experience unique moments
- Season pass holder
- Social media junkie

- Typical occasional skier
- Ideal conditions only: snow quality, wide selection of slopes, low crowding and line waits
- Really price-sensitive
- Skis with family or spouse

- Quality family time
- Resort adapted to families : welcoming staff, easy and groomed slopes, minimal crowding and line waits
- Mostly weekend days, half day of a few hours

- Expert skier
- Skis for the challenge and the exhilaration
- Full day on the slopes
- Optimal conditions: snow quality, powder, non-groomed slopes

- All about pleasure, staying active
- Skis mostly with friends
- Good skiing : short lift line waits, natural snow, wide selection of slopes
- Fun ambiance : après-ski, dynamic atmosphere

- Night skiing among friends
- More snowboarders
- Resort = his “playground”
- Modules, snowpark
- Dare-devil

### Sociodemographic Profile

- + Female
- 33 y.o. in average (high representation of 15 to 34 y.o.)
- Employee or student
- Revenue < 100k
- College or less

- + Male
- 31 y.o. in average (more 15 to 34 y.o. than any other segment)
- Secondary residence near a ski resort
- Employee
- Revenue < 100k
- Multicultural

- Male or female
- 39 y.o. in average (more 35-44 y.o. than any other segment)
- More present in Quebec
- Employee or retired
- Revenue > 50k

- + Female
- 44 y.o. in average (more 45-54 y.o. than any other segment)
- Employee or retired
- Revenue > 50k

- + Male
- 42 y.o. in average (more 65+ y.o. than any other segment)
- More present in BC and AB
- Employee or retired
- University
- Revenue > 100k

- + Male
- 40 y.o. in average (more 55 to 64 y.o. than any other segment)
- Employee
- Revenue > 100k

- + Male
- 33 y.o. in average (high representation of 15 to 34 y.o.)
- Employee
- College or less
- Revenue < 100k

# How to Read the Tables

Throughout the report, these symbols will be used to demonstrate ...



Elements that most define each of the segments



% is higher than all skiers

## Media Habits



Newspapers



Television



Magazines



Internet



Radio



Billboard signs

## Household Composition



Couple WITH children at home



Couple WITHOUT children at home



Single without children at home

## Basics



Gender



Age



Place of residence

## Other Sociodemographic Profile Symbols



Ethnicity (other than White/Caucasian)



Employment situation



Annual income



Education



Own a secondary residence near a ski resort



# The Newbie – ID Card

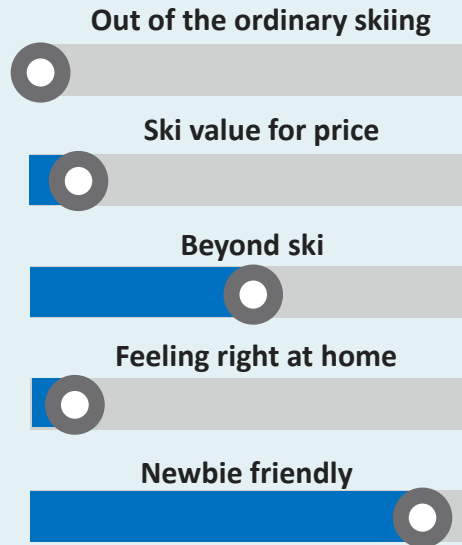


**15%**  
of skiers

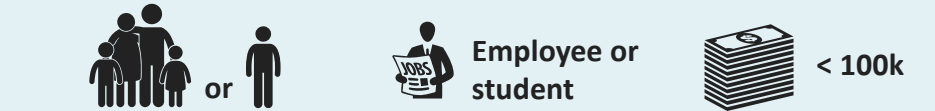
**13%**  
of ski days

## “With a little help from my friends”

- **Friends and family’s influence** plays a big role in the Newbie’s participation in skiing. Whether to start/restart the sport, get information on resorts or go on a ski outing, their **social circle** is the little “push” that the Newbie needs to encourage them to go skiing/snowboarding.
- The Newbie **skis for fun**, as a way to enjoy winter, like another string to their winter bow. The unique experience skiing provides is thrilling, but at the same time, the Newbie wants to **feel safe**. Thus, they go to a resort that is **easy to get to and where they feel welcome**. To facilitate their first steps, they look for a ski resort that offers **many easy slopes, a learning area and quality lessons**.
- But **skiing is not everything**: variety and quality of food, additional activities and services on-site or nearby, Wi-Fi as well as state-of-the art facilities are essential elements to complete their experience.
- Finally, finding a **good promotion/discount** may be a good trigger to visit a resort.



## Sociodemographic Profile



BC	AB	Prairies	ON	QC	Atlantic	Total
15%	16%	7%	25%	23%	13%	100%

\* Presence of the segment in each province

## Other activities participated in during the winter

- Going to the gym
- Swimming in a pool
- Ice skating
- Tubing

# The Newbie – Skier Profile

## ✓ HISTORY

- Motivations to start skiing: Enjoy / appreciate winter and friends are doing it
- Started skiing between 11 and 24 y.o.
- 10 ski seasons or less
- Stopped for more than 2 consecutive seasons: family, location, lack of interest  
Started again: regained interest, encouragement from group, to meet people

## ✓ HABITS

- Number of ski outings: 1 to 4 (41%), 5 to 9 (19%)
- Skiing mostly with family or friends
- Spends time on green or blue runs
- Weekends or holiday days
- Half day or few hours
- Mix of season pass, frequency card or other types of tickets

## ✓ SKI RESORTS VISITED

- Visits 1 or 2 ski resorts per season

## ✓ MAJOR TRIGGERS TO GO SKIING...

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• Ideal temperature</li> <li>• Friend's influence</li> <li>• Holiday, vacation, school break</li> <li>• Need to unwind, relax</li> <li>• Organized transportation (shuttle)</li> </ul> | <p>...OR NOT</p> <ul style="list-style-type: none"> <li>• Weather forecast</li> <li>• Lack of time</li> <li>• Road conditions</li> </ul> |
|---|--|

# The Newbie – Psychology and Emotions



## MOTIVATION TO SKI



### Experience

Helps me to fully enjoy winter 36%

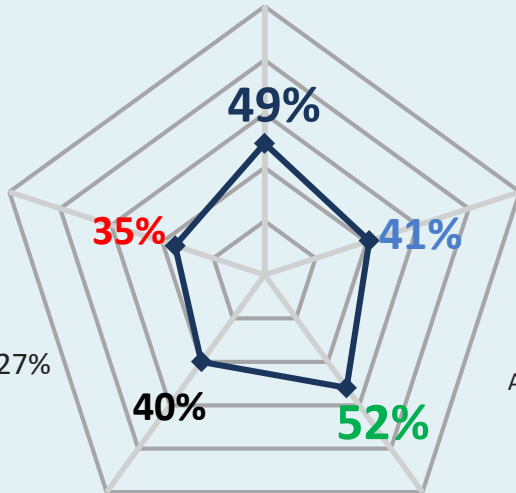
Provides me with unique experiences 19% +



### Sensations

Allows me to challenge myself 27%

Gives me a sense of euphoria 9%



### Well-being



Allows me to let go 19%

Allows me to take time for myself 19%

Allows me to take care of my health 12%



### Relations

Allows me to spend quality time with my family 25%

Allows me to meet new people 16%

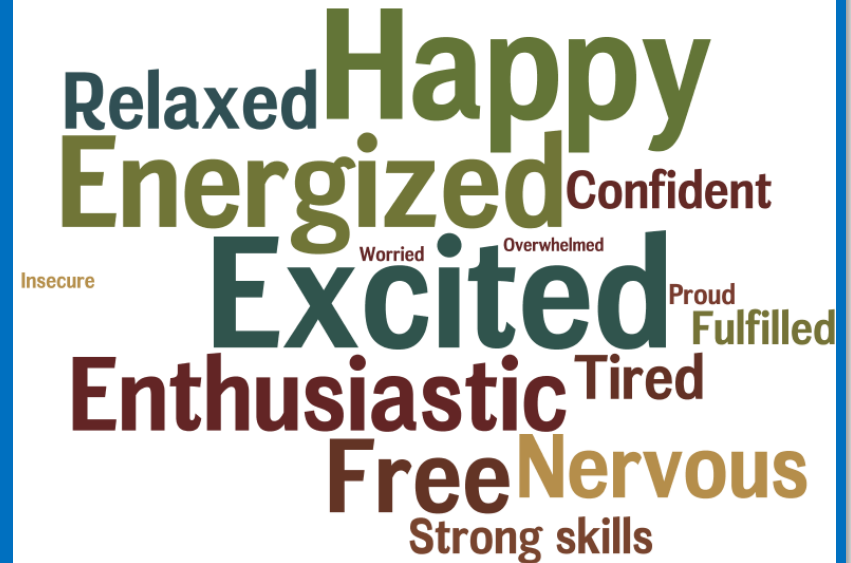
### Pleasure



Allows me to have fun 39%

Gives me pleasure 24%

## EMOTIONS FELT DURING SKI OUTING



# The Newbie – Planning and Media Habits

## SKI OUTING PLANNING

Plans in advance: 3 to 7 days (31%), more than a week before (25%)

Internet (67%)

- ✓ Ski resort website (64%)  
Rates and schedule, ski conditions, promotions
- ✓ Internet search engines (63%)

Word-of-mouth, friends, family (53%)

Social media (Facebook, etc.) (35%) 

## CHOICE OF SKI RESORT


Most important **sources of information** when comes time to plan a ski visit:

- ✓ Word-of-mouth from people I know (53%)
- ✓ Ski resort's website (50%)
- ✓ Skiers' comments/feedbacks (42%)
- ✓ Real-time promotion (same day) (40%)
- ✓ Promotion on the ski area's social media network (33%)



Most **relevant media** to learn more about a ski resort:

- ✓ Special offers (54%)
- ✓ Social media or Internet advertising (34%)

## CONNECTIVITY

In possession of their **smartphone** during a ski outing: 91% 

Smartphone used to:

- ✓ Post some photos/videos of ski day outing online (48%) 
- ✓ Listen to music/radio (38%)
- ✓ Update status (Facebook, etc.) (31%) 
- ✓ Post comments/write reviews related to current ski day outing (23%)

## SKI VACATION PLANNING

1 or more ski vacations in the last 2 seasons (mainly inside province - 61%)

Plans not far ahead (3 weeks or less) (58%)

Internet (73%)

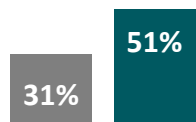
- ✓ Internet search engines (57%)
- ✓ Ski resort website (51%)
- ✓ Discount sites (Groupon, etc.) (28%)

Word-of-mouth, friends, family (49%)

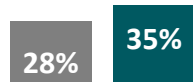
## GENERAL MEDIA HABITS

Hard copy / Traditional

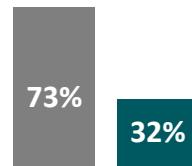
Online



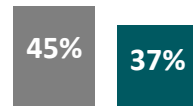
3 times + per week



3 times + per month



3 times + per week



3 hours + per day



3 hours + per day (personal use)



62%



48%



36%

Use 1 time + per day



73%



28% 

Main means of transportation during the week to get to work/school

# The Newbie – Food for Thought



## WE TALK TO THEM ABOUT...

- A complete experience: *ski, eat and play*
- Winter fun, other ways to enjoy winter
- Unwind during holidays
- Welcoming resort vibe
- Ease of learning
- Proximity, reassurance



## WE SHOW THEM...

- Easy slopes
- Friendly school-staff teaching adults
- Learning area dedicated to Beginners
- Modern facilities
- A variety of food
- On-site activities
- Easy to understand signage



## WE REACH THEM...

- Ski resort website
- Social media (e.g. Facebook)  
= promotions, advertising, contest
- Internet banner advertising or online newspapers  
= special offers, real time promotions
- Traditional radio



## WE OFFER THEM...

- Discounts and promotions
  - During weekends or holiday days
  - Package for half days or a couple of hours
  - Cross-selling with lessons and equipment rentals
  - Cross-selling with food at the ski resort
  - Cross-selling with other activities/services on-site or nearby
- Wi-Fi at the ski resort

# The Digital Adventurer – ID Card

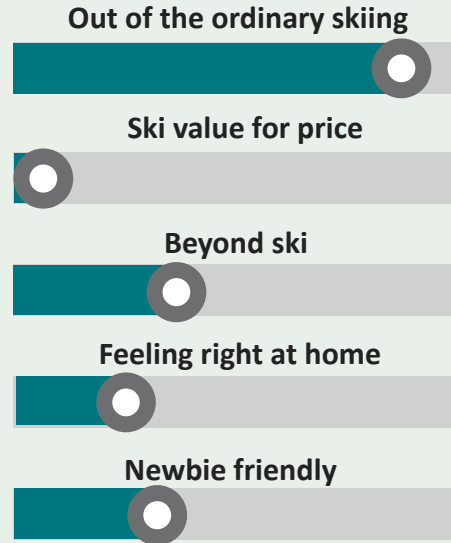


**39%**  
of skiers

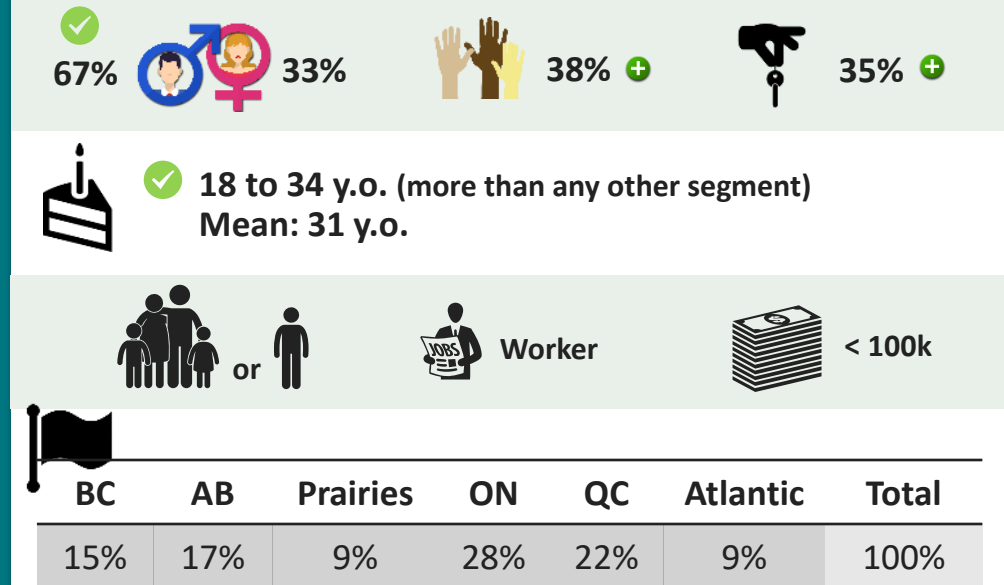
**17%**  
of ski days

## Let me live an Experience

- The Digital Adventurer looks for **authentic** and **new experiences**. The “**unconventional**” **skiing** that a resort can provide – difficult and non-groomed slopes, off-piste, terrain park – will answer their needs. And they are **ready to spend for it!** Owning a season pass for one resort will not prevent them from visiting other appealing resorts during the season nor from taking ski vacations.
- Apart from non-traditional skiing, the resort should also **offer unique moments**, with great social events and activities – another opportunity to meet new people.
- And all this entertainment should be widely promoted. A **simple promotion/ad or contest** seen on social media may trigger a spontaneous visit to the resort.
- Indeed, this segment is a **(social) media junkie**, compared to their peers. The resort’s digital offer is very resourceful for them.



## Sociodemographic Profile



\* Presence of the segment in each province

- Other activities participated in during winter
- Going to the gym
  - Swimming in a pool
  - Snowmobiling
  - Ice skating
  - Hockey

# The Digital Adventurer – Skier Profile

## ✓ HISTORY

- Many motivations to start skiing: Enjoy / appreciate winter, family was doing it, to stay active
- Late start to skiing or snowboarding (15 to 34 y.o.)
- 10 ski seasons or less
- Stopped for more than 2 consecutive seasons: family or location
- Started again: regained interest or children are skiing

## ✓ HABITS

- Intermediate or beginner level
- Number of ski outings: once a week (51%), 20 + (30%)
- Skiing mostly with family or friends
- Spends time on various runs and snow / terrain parks
- Week days + or weekend / holiday evenings
- Full or half day
- Mostly season pass holders +, bought every year

## ✓ SKI RESORTS VISITED

- Segment which visits the most ski resorts per season (3 on average)

## ✓ MAJOR TRIGGERS TO GO SKIING...

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• Friend’s influence</li> <li>• Internet promotion or advertising</li> <li>• Special event at the ski resort</li> <li>• Organized transportation (shuttle) + or public transportation +</li> </ul> | <p>...OR NOT</p> <ul style="list-style-type: none"> <li>• Lack of time</li> </ul> |
|---|---|

# The Digital Adventurer – Psychology and Emotions



## MOTIVATION TO SKI



### Experience

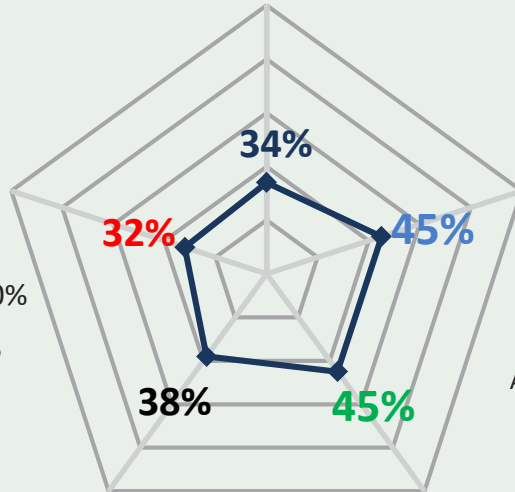
Helps me to fully enjoy winter 22%

Provides me with unique experiences 15%

### Sensations

Allows me to challenge myself 20%

Gives me a sense of euphoria 14%



### Well-being



Allows me to let go 22%

Allows me to take time for myself 18%

Allows me to take care of my health 14%



### Relations

Allows me to meet new people 22% +

Allows my to spend quality time with my family 18%

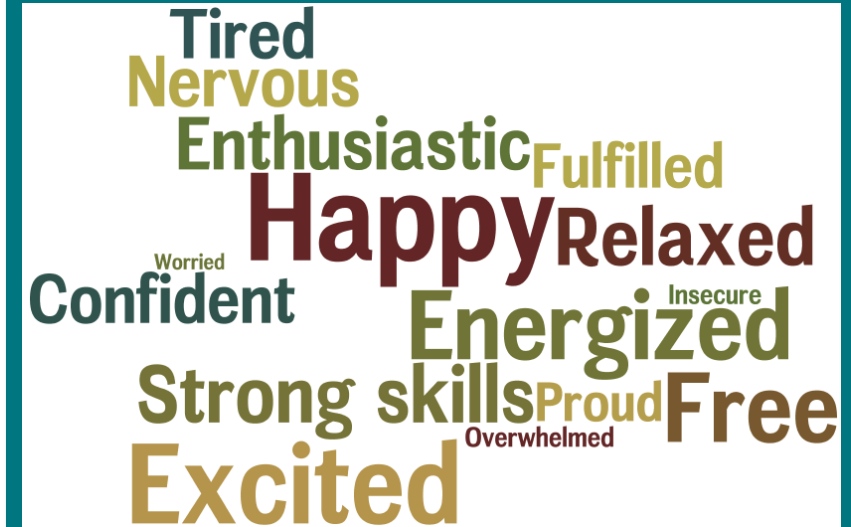
### Pleasure



Allows me to have fun 27%

Gives me pleasure 26%

## EMOTIONS FELT DURING SKI OUTING





# The Digital Adventurer – Planning and Media Habits



## SKI OUTING PLANNING

Do not plan in advance: same day (23%) +, 1 or 2 days before (44%) +

Internet (55%)

- ✓ Internet search engines (48%)
- ✓ Ski resort website (31%)
- + Promotions, activities/events, accommodations

Social media (Facebook, etc.) (28%)

Advertisement received by mail (26%)

## CHOICE OF SKI RESORT

Most important sources of information when comes time to plan a ski visit:

- ✓ Promotion - ski area's social network (42%) +
- ✓ Ski resort's advertising (41%) +
- ✓ Real-time promotion (same day) (41%) +
- ✓ Everything I read/hear in the media (40%) +
- ✓ Viral video (YouTube, etc.) (40%) +
- ✓ Contest (39%) +

Most relevant media to learn more about a ski resort:

- + Radio / TV / newspaper / Internet / outdoor / social media ads, sponsorship

## CONNECTIVITY

In possession of their smart phone during a ski outing: 87%

Use smartphone to:

- ✓ Post comments/write reviews related to current ski day outing (29%) +
- ✓ Post some photos/videos of ski day outing online (25%)
- ✓ Listen to music/radio (25%)

## SKI VACATION PLANNING

Many ski vacations in the last 2 seasons (inside or outside province – 93%) +

Plans not far ahead (3 weeks or less) (66%)

Internet (54%)

- ✓ Internet search engines (50%)
- ✓ Ski resort website (34%)

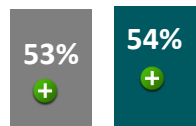
Advertisement received by mail (26%)

Television (20%)

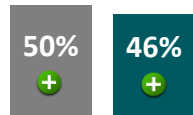
## GENERAL MEDIA HABITS

Hard copy / Traditional

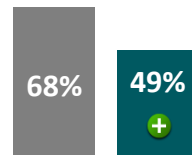
Online



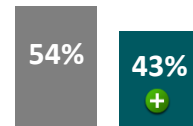
  
3 times + per week



  
3 times + per month



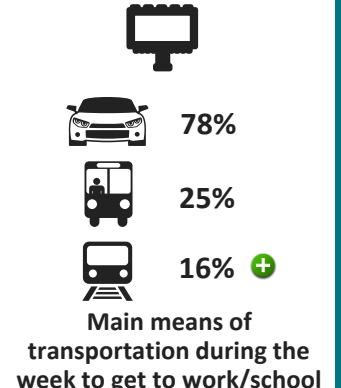
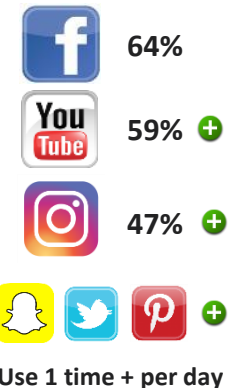
  
3 times + per week



  
3 hours + per day



  
3 hours + per day (personal use)



# The Digital Adventurer – Food for Thought



## WE TALK TO THEM ABOUT...

- All-inclusive unique experience: ski, entertain, sleep and repeat
- Dynamic resort, festive ambiance
- Socializing, togetherness, friendship
- Being active while having fun



## WE SHOW THEM...

- Diversified ski offer, off the beaten tracks
- Friends groups
- Season events schedule, promoting big event
- On-site and nearby entertainment
- On-site accommodation



## WE REACH THEM...

- Engaging website content (inspiring images and videos)
- Contest/promotion on social media channel or website
- Ski resort newsletter or promotional email
- Mass media
- Viral video
- Augmented/virtual reality (experience)



## WE OFFER THEM...

- Event days
- Promotions triggering/lengthening visit
  - Ski + accommodation + other activities on-site or nearby
  - Cross-selling with other activities/services on-site or nearby
  - Real-time promotions during a special event day

# The Idealist – ID Card



**8%**

of skiers

**10%**

of ski days

## Looking for optimal conditions

- This segment represents the **typical occasional skier**, who's been participating in the sport for many years.
- Skiing is part of **enjoying winter and spending quality time with their family** (rather than with friends), but not at all costs. They are the **most price-sensitive segment**. However, they will decide to go skiing if the **weather and the ski conditions are ideal**.
- The Idealist prefers a resort which is **near their home** where they can ski weekend days and week evenings. They **rarely take ski vacations**.
- They look for **good snow quality** and a **wide selection of slopes**. Even though they ski mostly during prime time, they expect **low crowding on trails** and **minimal lift line waits**, wishing to maximize their time on the slopes.



## Sociodemographic Profile



BC	AB	Prairies	ON	QC	Atlantic	Total
18%	14%	1%	18%	<b>43%</b>	6%	100%

\* Presence of the segment in each province



# The Idealist – Skier Profile

## ✓ HISTORY

- Many motivations to start skiing: Enjoy / appreciate winter, family or friends were doing it
- Started to ski at an early age (17 y.o. or less)
- More than 10 ski seasons
- Stopped for more than 2 consecutive seasons: financial reasons + or location
- Started again: regained interest, group encouragement, children are older

## ✓ HABITS

- Intermediate skier level
- Number of ski outings: 4 or less (48%), 5 to 14 (34%)
- Ski mostly with family or spouse
- Spends time mostly on blue runs +
- Weekend days or week evenings
- Half day or a few hours
- Mostly buys ski tickets

## ✓ SKI RESORTS VISITED

- Visits 1 or 2 ski resorts per season

## ✓ MAJOR TRIGGERS TO GO SKIING...

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Ideal temperature +</li> <li>• Fresh snow</li> <li>• Wanting to do an outdoor physical activity</li> <li>• Entourage influence</li> <li>• Already committed (purchased ticket, season ticket in advance)</li> </ul> | <p>...OR NOT</p> <ul style="list-style-type: none"> <li>• Weather forecast / Cold</li> <li>• Economic choices</li> <li>• No one to come with</li> </ul> |
|--|---|

# The Idealist – Psychology and Emotions

## MOTIVATION TO SKI



### Experience

Helps me to fully enjoy winter  57% +

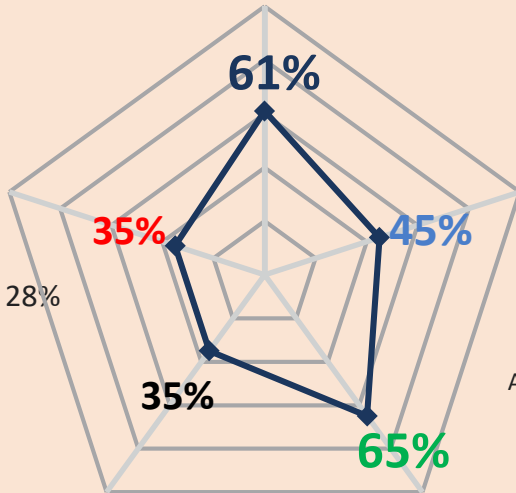
Provides me with **unique experiences**  9%



### Sensations

Allows me to **challenge** myself  28%

Gives me a sense of **euphoria**  8%



### Well-being



Allows me to **let go**  19%

Allows me to **take time** for myself  18%

Allows me to **take care** of my health  18%



### Relations

Allows my to spend **quality time** with my family  34% +

Allows me to **meet new people**  1%

### Pleasure



Gives me **pleasure**  40%

Allows me to **have fun**  35%

## EMOTIONS FELT DURING SKI OUTING



# The Idealist – Planning and Media Habits

## SKI OUTING PLANNING

Plans a little in advance: 1 or 2 days before (37%), 3 to 7 days before (37%) +

Internet (72%)

- ✓ Ski resort website (82%)  
Ski conditions, rates and schedule
- ✓ A weather website (43%)
- ✓ Internet search engines (41%)

Word-of-mouth, friends, family (53%)

## CHOICE OF SKI RESORT

Most important sources of information when comes time to plan a ski visit :

- ✓ Ski resort's website (50%)
- ✓ Word-of-mouth from people I know (47%)

Most relevant media to learn more about a ski resort:

- ✓ Special offers (48%)

## CONNECTIVITY

In possession of their smart phone during a ski outing: 76%

Smartphone, if used is for:

- ✓ None (44%) +
- ✓ Post some photos/videos of ski day outing online (30%)

## SKI VACATION PLANNING

Segment with less ski vacations in the last 2 seasons (inside or outside province – 44%)

Plans far ahead (1 month or more) (53%)

Internet (83%) +

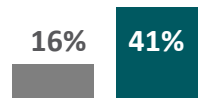
- ✓ Ski resort website (79%) +
- ✓ Internet search engines (58%)
- ✓ A weather website (47%)

Word-of-mouth, friends, family (49%)

## GENERAL MEDIA HABITS

Hard copy / Traditional

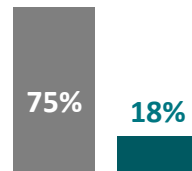
Online



3 times + per week



3 times + per month



3 times + per week



3 hours + per day



3 hours + per day (personal use)



64%



25%



16%

Use 1 time + per day



78%



15%

Main means of transportation during the week to get to work/school

# The Idealist – Food for Thought



## WE TALK TO THEM ABOUT...

- Winter joy
- Quality family time
- Proximity, convenience
- Great conditions (snow, weather)
- Skiing = healthy sport



## WE SHOW THEM...

- Ideal weather and ski conditions
- Quality of snow at the resort
- Wide selection of slopes
- Small crowds



## WE REACH THEM...

- Ski resort website (ski conditions, special offer in the rate and schedule area)
- Advertisement (banner) in a weather website
- Traditional radio



## WE OFFER THEM...

- Best prices
  - Family group tickets
- Discounts and promotions
  - During weekend days and week evenings
  - Package for half days or a couple of hours
  - “Buy 1 day, get half a day off”

# The Familyski – ID Card



8%

of skiers

10%

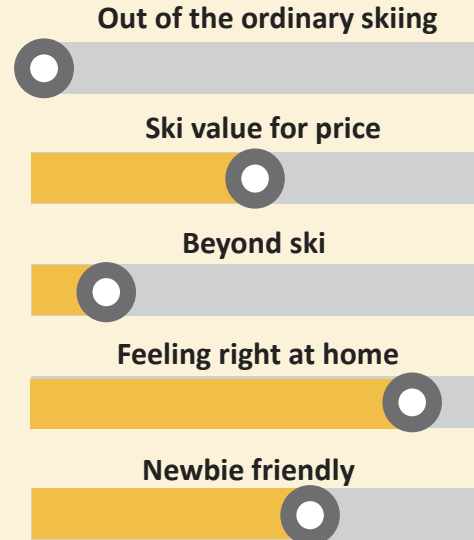
of ski days

## Family time in a friendly atmosphere

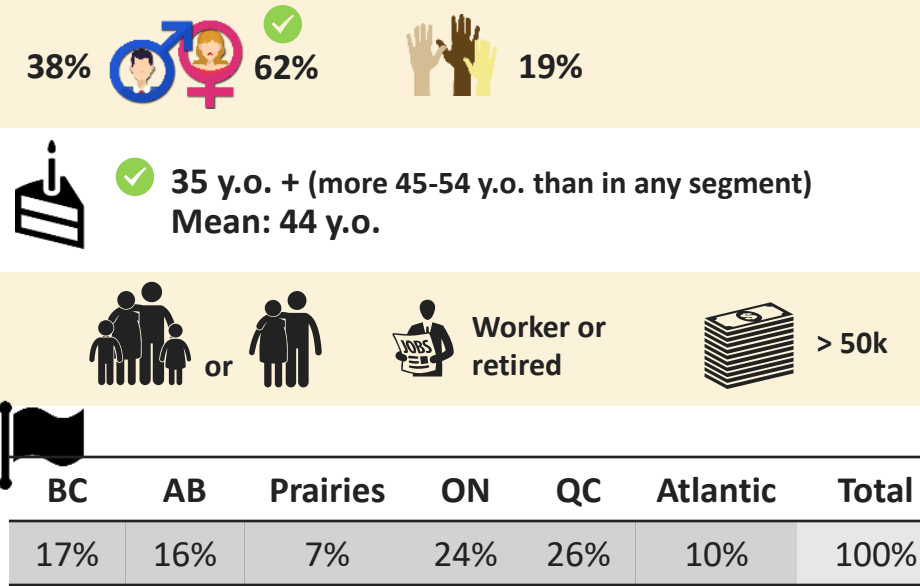
- In ideal weather conditions, skiing is the perfect winter sport to **spend quality time together** and **keep the family active**.
- Since skiing is **one of many activities participated in by the children**, the Familyski skis less often during the season. They also adapt their schedule to the school agenda, hence visiting ski resorts mostly on weekends.
- They look for a resort with a **good reputation**, in which they **feel welcomed and taken care of** by staff members (parental instinct?).

The resort must be **nearby**, offer **easy and groomed slopes**, with **minimal crowding on trails and lift line waits**. Food of great quality will also be appreciated. The website is a good source of information for them.

- Skiing can be expensive for a family. **Deals or frequency cards** are appealing options for the Familyski. Even though they are pretty loyal to their preferred ski resort, they could go elsewhere if they stumble upon an enticing special offer from another nearby resort.



## Sociodemographic Profile



## Other activities participated in during winter

- Going to the gym
- Ice skating
- Swimming in a pool
- Hiking
- Snowshoeing
- Attending sports for children



# The Familyski – Skier Profile

## ✓ HISTORY

- Many motivations to start skiing: Enjoy / appreciate winter, friends were doing it, school offered a special program
- Early start in skiing (11 to 17 y.o.) or much later with children (25 to 44 y.o.)
- More than 15 ski seasons
- Stopped for more than 2 consecutive seasons: family, location, financial reasons
- Started again: regained interest, group encouragement, children are older

## ✓ HABITS

- Intermediate skier level
- Number of ski outings: 4 or less (45%), 5 to 14 (35%)
- Ski mostly with family or spouse
- Spends time on green or blue runs
- Mostly on weekend days
- Half day or a few hours
- Mostly buys ski tickets or frequency card

## ✓ SKI RESORTS VISITED

- Visits 1 or 2 ski resorts per season

## ✓ MAJOR TRIGGERS TO GO SKIING...

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Ideal temperature</li> <li>• Wanting to do an outdoor physical activity</li> <li>• Spouse or other family member's influence</li> <li>• Already committed (purchased ticket, season ticket in advance)</li> </ul> | <p><b>...OR NOT</b></p> <ul style="list-style-type: none"> <li>• Weather forecast / Cold</li> <li>• Road conditions +</li> <li>• No one to go with</li> </ul> |
|--|---|

# The Familyski – Psychology and Emotions

## MOTIVATION TO SKI



### Experience

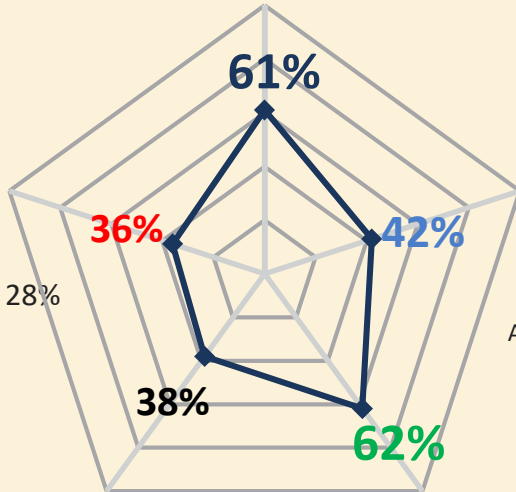
Helps me to fully enjoy winter **53%**

Provides me with **unique experiences** **15%**

### Sensations

Allows me to **challenge** myself **28%**

Gives me a sense of **euphoria** **9%**



### Well-being



Allows me to **take time** for myself **21%**

Allows me to **take care** of my health **17%**

Allows me to **let go** **11%**



### Relations

Allows my to spend **quality time** with my family **34%** +

Allows me to **meet new people** **4%**

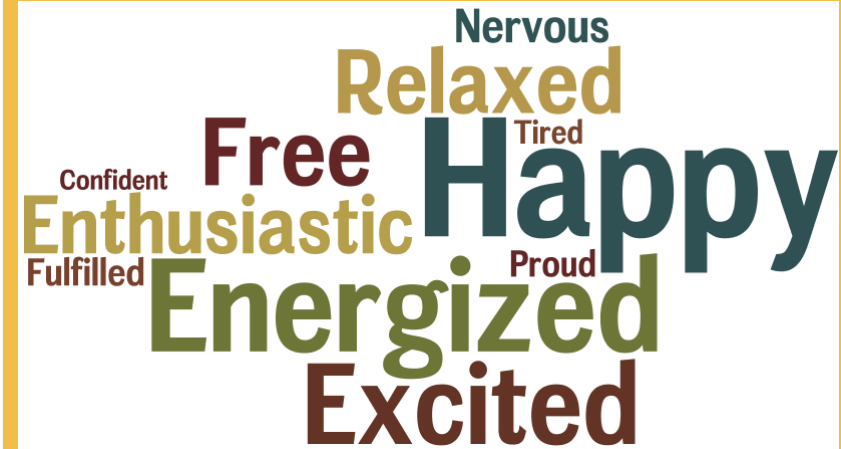
### Pleasure



Allows me to **have fun** **38%**

Gives me **pleasure** **36%**

## EMOTIONS FELT DURING SKI OUTING



# The Familyski – Planning and Media Habits

## SKI OUTING PLANNING

**Plans** in advance: 3 to 7 days before (34%), more than a week before (33%) +

Internet (62%)

- ✓ Ski resort website (81%)  
Rates and schedule, ski conditions
- ✓ Internet search engines (54%)
- ✓ Weather website (42%)

Word-of-mouth, friends, family (56%)

## CHOICE OF SKI RESORT

Most important **sources of information** when comes time to plan a ski visit:

- ✓ Word-of-mouth from people I know (66%) +
- ✓ Ski resort's website (52%)
- ✓ Skiers' comments/feedback (38%)

Most **relevant media** to learn more about a ski resort:

- ✓ Special offers (55%) +

## CONNECTIVITY

In possession of their **smart phone** during a ski outing: 79%

Use smartphone for:

- ✓ Post some photos/videos of ski day outing online (42%)
- ✓ Update status (Facebook, etc.) (26%)

## SKI VACATION PLANNING

Ski vacations in the last 2 seasons (inside or outside province - 61%)

Plans far ahead (1 month or more) (62%)

Internet (76%)

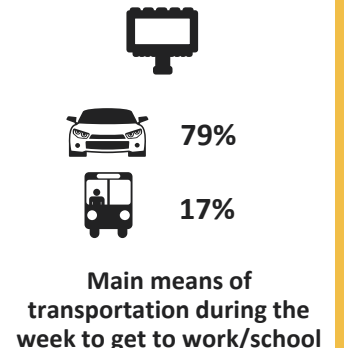
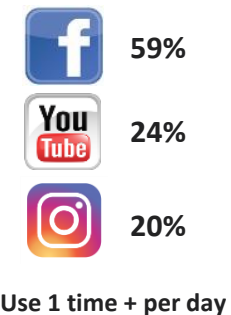
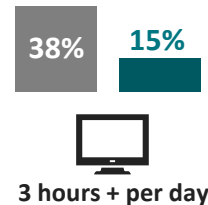
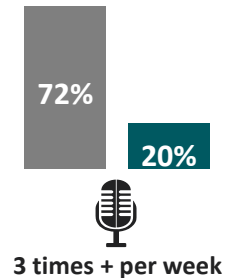
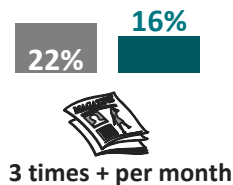
- ✓ Ski resort website (74%)
- ✓ Internet search engines (61%)
- ✓ A weather website (36%)
- ✓ Travelers' evaluation site (28%)

Word-of-mouth, friends, family (62%)

## GENERAL MEDIA HABITS

Hard copy / Traditional

Online



# The Familyski – Food for Thought



## WE TALK TO THEM ABOUT...

- Fun for everyone
- Best family sport
- Quality family moments
- Ease / security / peace of mind
- Proximity
- Resort reputation
- Friendly atmosphere



## WE SHOW THEM...

- Family experiences, children having fun
- Easy and groomed slopes
- Smiling staff, helping children
- Quality and variety of food options at the resort



## WE REACH THEM...

- Ski resort website
- Traditional radio
- Internet banners advertising or online newspapers = special offers
- Advertisement (banner) in a weather website



## WE OFFER THEM...

- Discounts and promotions
  - During weekends
  - Family packages
  - Package for half days or a couple of hours
  - Cross-selling with food at the ski resort

# The Passionate – ID Card



**5%**

of skiers

**18%**

of ski days

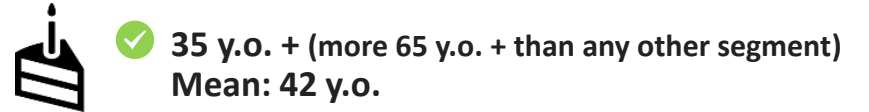
## Ski is part of their DNA

- When a snowfall occurs, the Passionate will most likely take a “**sick/ski day**” the next morning. **Addicted to the exhilaration** skiing brings them from an early age (they have hardly skipped a season), they wouldn’t live without it.
- An **expert skier**, they consider new ski resorts as a way to **challenge and push themselves**. They choose ski resorts where **snow quality, powder and non-groomed slopes are at their best** and where a wide selection of black diamond slopes are offered. Nothing else (food, events, socializing, etc.) matters!



- Spending the **whole day on the slopes**, the Passionate still wants to maximize their downhill skiing time. They then tend to avoid more popular resorts to avoid crowded trails or long lift line waits.
- Looking also for **optimal conditions**, ski resort websites and weather websites/apps are useful for them.
- Since they take a lot of ski outings throughout the year, this segment is **sensitive to promotions and discounts**.

## Sociodemographic Profile



BC	AB	Prairies	ON	QC	Atlantic	Total
25%	25%	1%	16%	30%	3%	100%

\* Presence of the segment in each province

## Other activities participated in during the winter

- Going to the gym
- Hiking +
- Cross-country skiing
- Hockey
- Snowshoeing

# The Passionate – Skier Profile

## ✓ HISTORY

- Many motivations to start skiing: Family was doing it, sensations these sports trigger
- Began skiing as a young child (10 y.o. or less)
- More than 15 ski seasons (26 on average +)
- Majority never stopped for more than 2 consecutive seasons, for those who did, it was a location issue +
- Started again: moved to a different location, children are older

## ✓ HABITS

- Expert + or intermediate level
- Number of ski outings: 5 to 19 (46%), 20 + (31%)
- Skiing mostly with friends or spouse
- Spends time on black diamond + or double black diamond runs +
- Week / weekend days or holiday days
- Full day +
- Mix of season pass, frequency card or other types of tickets

## ✓ SKI RESORTS VISITED

- Visits 3 ski resorts or more per season +

## ✓ MAJOR TRIGGERS TO GO SKIING...

- Fresh snow +
- Ideal temperature
- Wanting to do an outdoor physical activity
- Need for excitement
- ...OR NOT
- Weather forecast / Cold

# The Passionate – Psychology and Emotions

## MOTIVATION TO SKI



### Experience

Helps me to fully enjoy winter **53%**

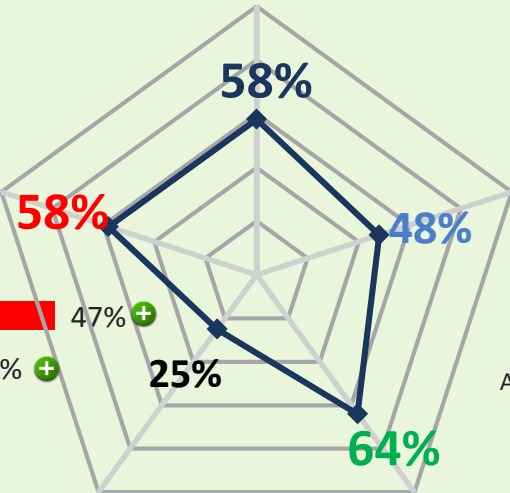
Provides me with **unique experiences** **7%**



### Sensations +

Allows me to **challenge** myself **47%** +

Gives me a sense of **euphoria** **23%** +



### Well-being



Allows me to **let go** **20%**

Allows me to **take time** for myself **18%**

Allows me to **take care** of my health **15%**



### Relations

Allows my to spend **quality time** with my family **23%**

Allows me to **meet new people** **5%**

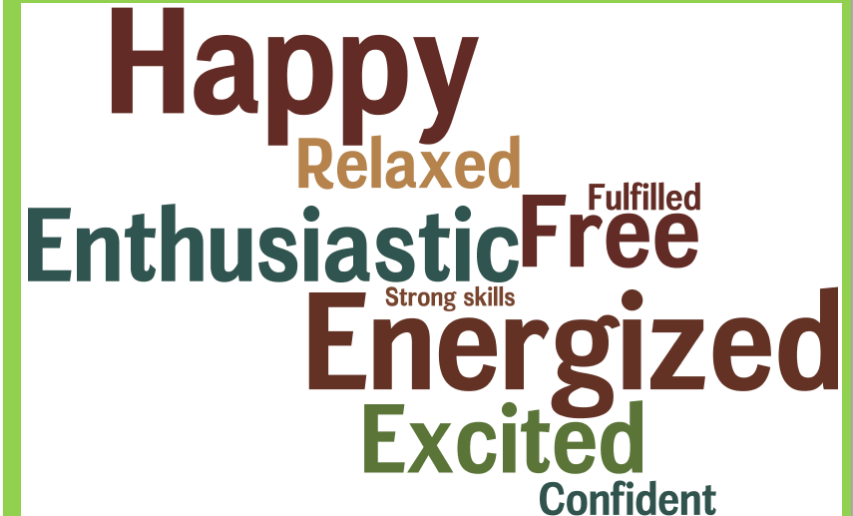
### Pleasure



Gives me **pleasure** **41%**

Allows me to **have fun** **37%**

## EMOTIONS FELT DURING SKI OUTING



# The Passionate – Planning and Media Habits

## SKI OUTING PLANNING

Plans a little in advance: 1 or 2 days before (42%), 3 to 7 days before (35%)

Internet (70%)

- ✓ Ski resort website (90%) +
- Ski conditions +
- ✓ A weather website (55%) +

Word-of-mouth, friends, family (54%)

Social media (Facebook, etc.) (33%)

Mobile applications (24%) +

Weather application

## CHOICE OF SKI RESORT

Most important sources of information when comes time to plan a ski visit:

- ✓ Word-of-mouth from people I know (51%)
- ✓ Ski resort's website (50%)

Most relevant media to learn more about a ski resort:

- ✓ Special offers (44%)

## CONNECTIVITY

In possession of their smart phone during a ski outing: 84%

Use smartphone to:

- ✓ Post some photos/videos of ski day outing online (39%)
- ✓ Listen to music/radio (39%)

## SKI VACATION PLANNING

Ski vacations in the last 2 seasons (inside or outside province - 67%)

Plans far ahead (1 month or more) (58%)

Internet (74%)

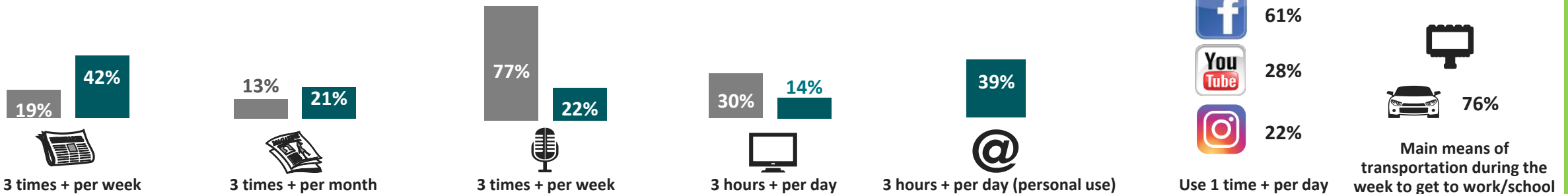
- ✓ Ski resort website (76%)
- ✓ Internet search engines (50%)
- ✓ A weather website (50%) +
- ✓ Tourist destination websites (31%) +

Word-of-mouth, friends, family (60%)

## GENERAL MEDIA HABITS

Hard copy / Traditional

Online





# The Passionate – Food for Thought



## WE TALK TO THEM ABOUT...

- *“Would you dare...?”*
- Sensations, adrenaline, thrill
- Pushing boundaries, challenge
- Powder experience
- 



## WE SHOW THEM...

- Untouched/untracked slopes
- Pristine snowy area
- Wide selection of challenging slopes
- Optimal conditions



## WE REACH THEM...

- Ski resort website (in the ski conditions area)
- Advertisement (banner) in a weather website or mobile application
- Social media (e.g. Facebook)  
= promotions, special offers



## WE OFFER THEM...

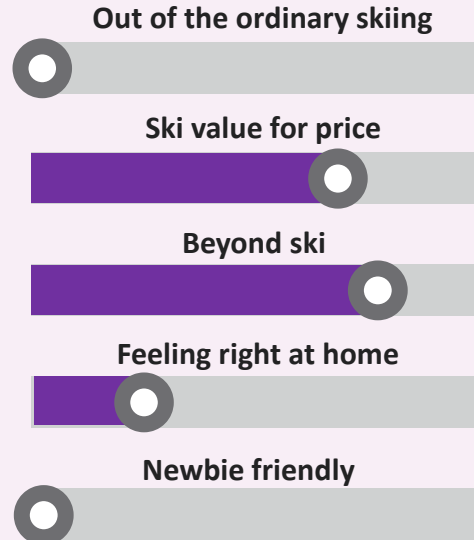
- Discounts and promotions
  - During week / weekend or holiday days
  - Package for multiple days
- Perks for expert skiers:
  - Possibility to ski before the official opening, "first tracks"
  - Real-time alerts on conditions
- Off-piste package (catskiing, heli-skiing, etc.)

# The Socializer – ID Card



## A perfect ski day in good company

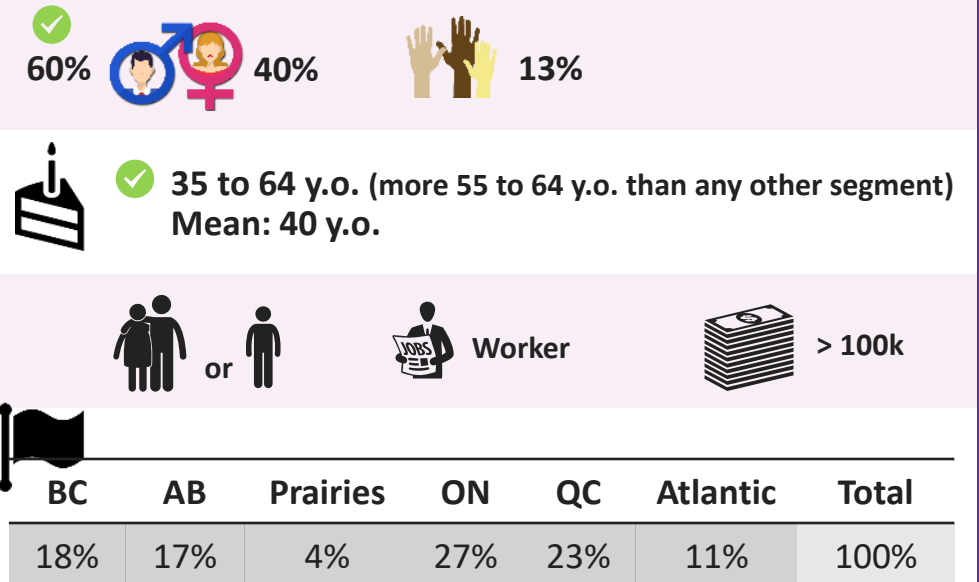
- All about pleasure, staying active and enjoying winter with friends, this is the motto of the Socializer. Now that the children have left home, it's time to have fun!
- The Socializer has started skiing early and has been participating for many years. However, they won't go down the slopes at all costs nowadays. They will be highly motivated if the temperature and conditions are ideal and if their friends are available to go with them.
- Good skiing, fun ambiance, the best of two worlds! **Good skiing** because they expect short lift line waits, abundant natural snow and a wide selection of groomed slopes. **Fun ambiance** because they'd like to mingle and enjoy après-ski with their friends in a dynamic and welcoming atmosphere.
- Overall, the Socializer will choose a ski resort with the reputation of being a fun place to ski.



8%  
of skiers

14%  
of ski days

## Sociodemographic Profile



\* Presence of the segment in each province

## Other activities participated in during winter

- Going to the gym
- Ice skating
- Hiking
- Snowshoeing

# The Socializer – Skier Profile

## ✓ HISTORY

- Many motivations to start skiing: Family / friends were doing it, enjoy / appreciate winter
- Started skiing early (14 y.o. or less)
- More than 20 ski seasons
- Stopped for more than 2 consecutive seasons: financial reasons, location
- Started again: regained interest, entourage encouragement, children are older

## ✓ HABITS

- Intermediate skier level
- Number of ski outings: 1 to 4 (36%), 5 to 9 (22%)
- Skiing mostly with friends + or spouse
- Spends time on blue or black diamond runs
- Weekend days or week /weekend evenings, holiday days
- Full or half day
- Mostly buys ski tickets or frequency card

## ✓ SKI RESORTS VISITED

- Visits 2 or 3 ski resorts per season

## ✓ MAJOR TRIGGERS TO GO SKIING...

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• Fresh snow</li> <li>• Ideal temperature</li> <li>• Wanting to do an outdoor physical activity</li> </ul> | <p><b>...OR NOT</b></p> <ul style="list-style-type: none"> <li>• Weather forecast / Cold</li> <li>• Road conditions</li> <li>• No one to go with</li> </ul> |
|---|---|

# The Socializer – Psychology and Emotions

## MOTIVATION TO SKI



### Experience

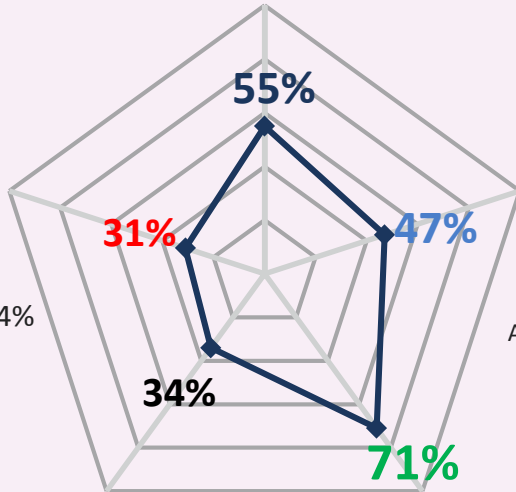
Helps me to fully enjoy winter **48%**

Provides me with **unique experiences** **13%**

### Sensations

Allows me to **challenge** myself **24%**

Gives me a sense of **euphoria** **9%**



### Well-being



Allows me to **take time** for myself **21%**

Allows me to **take care** of my health **20%**

Allows me to **let go** **17%**



### Relations

Allows my to spend **quality time** with my family **30%**

Allows me to **meet new people** **4%**

### + Pleasure



Allows me to **have fun** **47% +**

Gives me **pleasure** **39%**

## EMOTIONS FELT DURING SKI OUTING



# The Socializer – Planning and Media Habits

## SKI OUTING PLANNING

Plans in advance: 3 to 7 days before (36%), more than a week before (28%)

Internet (71%)

- ✓ Ski resort website (68%)  
Ski conditions, rates and schedules
- ✓ Internet search engines (61%)
- ✓ A weather website (40%)
- ✓ Tourist destination websites (21%) +
- ✓ Travelers evaluation site (19%) +

Word-of-mouth, friends, family (56%)

## CHOICE OF SKI RESORT

Most important sources of information when comes time to plan a ski visit:

- ✓ Word-of-mouth from people I know (63%)
- ✓ Ski resort's website (53%)
- ✓ Skiers' comments/feedback (36%)

Most relevant media to learn more about a ski resort:

- ✓ Special offers (52%)
- ✓ Internet advertising (banners, etc.) (27%)

## CONNECTIVITY

In possession of their smart phone during a ski outing: 89%

Use smartphone to:

- ✓ Post some photos/videos of ski day outing online (42%)
- ✓ Listen to music/radio (31%)
- ✓ Update status (Facebook, etc.) (25%)

## SKI VACATION PLANNING

Ski vacations in the last 2 seasons (inside or outside province - 73%)

Plans far ahead (1 month or more) (58%)

Internet (73%)

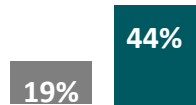
- ✓ Ski resort website (64%)
- ✓ Internet search engines (62%)
- ✓ Travelers' evaluation site (27%)

Word-of-mouth, friends, family (61%)

## GENERAL MEDIA HABITS

Hard copy / Traditional

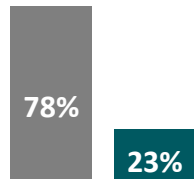
Online



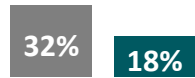
3 times + per week



3 times + per month



3 times + per week



3 hours + per day



3 hours + per day (personal use)



65%



34%



31%



25%

Use 1 time + per day



77%



14%

Main means of transportation during the week to get to work/school

# The Socializer – Food for Thought



## WE TALK TO THEM ABOUT...

- Pleasure of skiing
- Friendship, camaraderie
- Fun ritual
- Staying in shape



## WE SHOW THEM...

- Social events
- Après-ski facilities and bars / restaurants
- Groomed slopes
- Good reviews from other skiers
- Friendly staff
- No children!



## WE REACH THEM...

- Ski resort website
- Internet banners advertising or online newspapers  
= special offers, reviews site
- Traditional radio



## WE OFFER THEM...

- Discounts and promotions
  - During weekend / holiday days or week / weekend evenings
  - Package “get a half day free if you buy one day”
  - Friends package (group of 4, etc.)
  - Cross-selling with social events or food/drink at the après-ski

# Pals & Playgrounds – ID Card

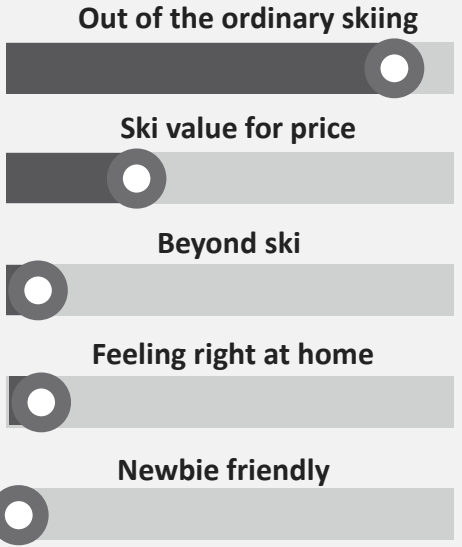


**17%**  
of skiers

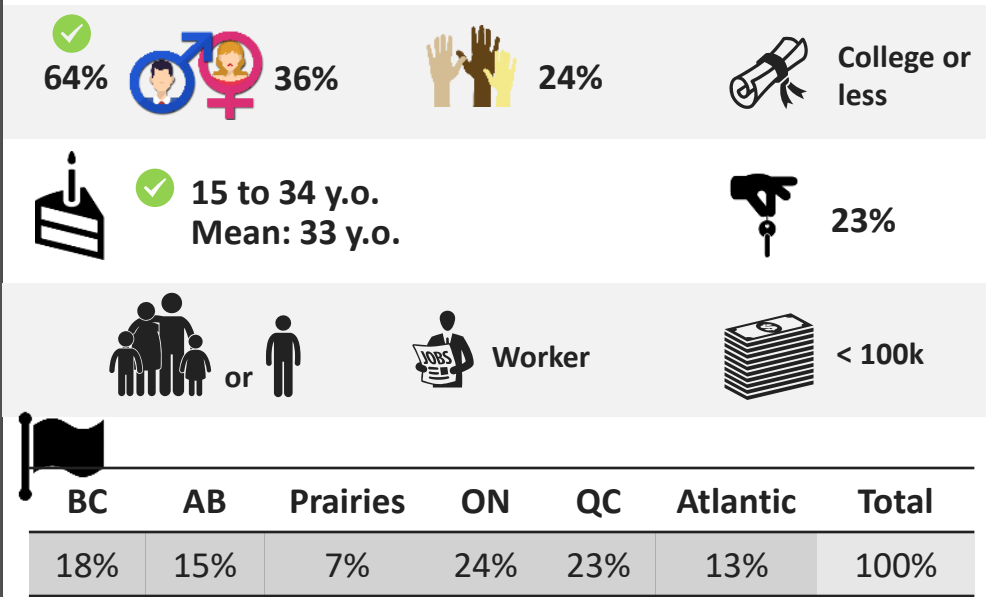
**17%**  
of ski days

## Enjoying my playground, preferably at night

- Pals & Playgrounds is a **huge fan of night skiing** compared to their peers. They usually go **with their friends**, no matter the day of the week. Then they can jump on **rails in the snow park** and benefit from limited crowds.
- They carefully choose their **“playground”**: They appreciate a resort that offers a numerous choice of trails, with a good level of difficulty, and both great snow quality and quantity. And to find one of their liking, they could take a **ski vacation** and enjoy and experience it to the fullest.
- A **dare-devil** from time to time, an injury could force them to stop participating in this sport for a while.



## Sociodemographic Profile



- Other activities participated in during winter**
- Going to the gym
  - Ice skating
  - Swimming in a pool
  - Hockey

# Pals & Playgrounds – Skier Profile

## ✓ HISTORY

- Many motivations to start skiing: Enjoy / appreciate winter, family was doing it, to stay active
- Early start in skiing (17 y.o. or less)
- 15 ski seasons or less
- Stopped for more than 2 consecutive seasons : family or injury/health issues +
- Started again: regain of interest, children are skiing, healed injury

## ✓ SKI RESORTS VISITED

- Visits 2 or 3 ski resorts per season

## ✓ HABITS

- Intermediate skier or snowboarder +
- Number of ski outings: 1 to 4 (50%), 20 + (31%)
- Skiing mostly with friends or family
- Spends time on blue or black diamond runs and snow / terrain parks
- Weekend days or week / weekend / holiday evenings
- Full or half day
- Mostly season pass holders, bought every year

## ✓ MAJOR TRIGGERS TO GO SKIING...

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Fresh snow</li> <li>• Ideal temperature</li> <li>• Holiday or vacation</li> <li>• Organized transportation (shuttle)</li> </ul> | <p>...OR NOT</p> <ul style="list-style-type: none"> <li>• Lack of time</li> <li>• Lack of snow in the city</li> </ul> |
|--|---|



# Pals & Playgrounds – Psychology and Emotions



## MOTIVATION TO SKI



### Experience

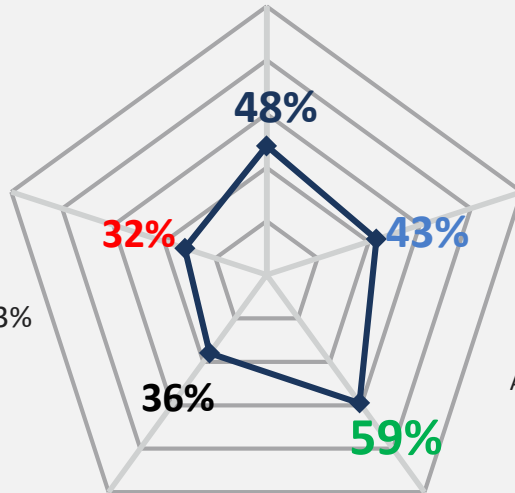
Helps me to fully enjoy winter 37%

Provides me with unique experiences 15%

### Sensations

Allows me to challenge myself 23%

Gives me a sense of euphoria 11%



### Well-being

Allows me to let go 19%

Allows me to take time for myself 17%

Allows me to take care of my health 14%



### Relations

Allows me to spend quality time with my family 22%

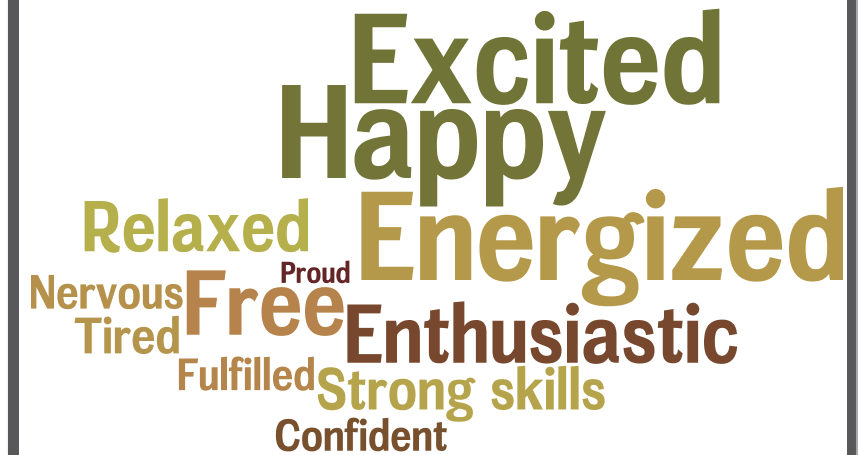
Allows me to meet new people 16%

### Pleasure

Allows me to have fun 39%

Gives me pleasure 32%

## EMOTIONS FELT DURING SKI OUTING




# Pals & Playgrounds – Planning and Media Habits



## SKI OUTING PLANNING

Plans a little in advance: 1 or 2 days before (39%), 3 to 7 days before (30%)

Internet (66%)

- ✓ Internet search engines (60%)
- ✓ Ski resort website (56%)
  - Ski conditions, weather forecast
- ✓ Discount sites (27%) 

Word-of-mouth, friends, family (43%)

Social media (Facebook, etc.) (31%)

## CHOICE OF SKI RESORT

Most important sources of information when comes time to plan a ski visit:

- ✓ Word-of-mouth from people I know (46%)
- ✓ Ski resort's website (45%)
- ✓ Skiers' comments/feedback (37%)
- ✓ Real-time promotion (same day) (35%)
- ✓ Promotion - ski area's social network (28%)

Most relevant media to learn more about a ski resort:

- ✓ Special offers (48%)
- ✓ Sponsorship of events (29%), TV advertising (28%), social media advertising (28%)

## CONNECTIVITY

In possession of their smart phone during a ski outing: 89%

Use smartphone to:

- Post some photos/videos of ski day outing online (41%)
- ✓ Listen to music/radio (38%)

## SKI VACATION PLANNING

Ski vacations in the last 2 seasons (inside or outside province - 82%) – 2<sup>nd</sup> segment who travels the most

Plans not far ahead (1 month or less) (81%)

Internet (69%)

- ✓ Internet search engines (63%)
- ✓ Ski resort website (50%)

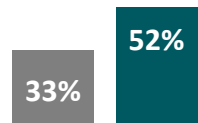
Social media (Facebook, etc.) (29%)

Advertising received by mail (25%)

## GENERAL MEDIA HABITS

Hard copy / Traditional

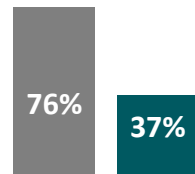
Online



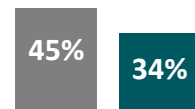
  
3 times + per week



  
3 times + per month



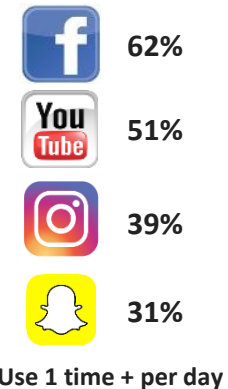
  
3 times + per week



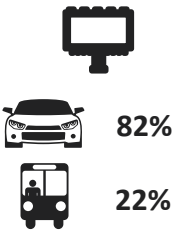
  
3 hours + per day



  
3 hours + per day (personal use)



Use 1 time + per day



Main means of transportation during the week to get to work/school

# Pals & Playgrounds – Food for Thought



## WE TALK TO THEM ABOUT...

- Joy of winter at night
- Pleasure with friends
- Adrenaline
- Playground
- Snow quality



## WE SHOW THEM...

- Original and unique snow / terrain park
- Aerials and exciting shots taken in snow park
- Illuminated mountain/slopes
- Snowfall / powder



## WE REACH THEM...

- Internet banners advertising or online newspapers = special offers, discount sites
- Ski resort website
- Social media (e.g. Facebook) = promotions, advertising, real-time promotions
- Sponsorship during evening events



## WE OFFER THEM...

- Discounts and promotions
  - During evenings (night skiing)
  - Package “buy 5 evenings and get one free”
- Perks for VIP Pals and Playgrounders:
  - Exclusive access to the snow / terrain park before the official opening
  - Combine night skiing + meal or night skiing + accommodation



**For more information, please contact:**

**Paul Pinchbeck, President & CEO**

**Ph: 905-856-4754 ext 102 [ppinchbeck@skicanada.org](mailto:ppinchbeck@skicanada.org)**

**Natalie Dalzell, Operations Manager**

**Ph: 905-856-4754 ext 103 [ndalzell@skicanada.org](mailto:ndalzell@skicanada.org)**