

NSAA - Model for Growth

Dear NSAA Member Resort:

As I outlined at the 2009 National Convention, one of the primary missions here at the National Ski Areas Association (NSAA) is to help resorts understand the implications of the significant demographic shifts that lie on the horizon. Simply put, as Baby Boomers - a generation that helped build the industry into what it is today - continue to age, they will begin dropping out of the sport at an alarming rate. Without an industry-wide effort focused on attracting newer, younger participants and converting them into loyal skiers and riders, ski areas could face dramatic declines in visitation in the not-so distant future.

With our renewed focus on conversion, information sharing becomes more and more critical in order for us to meet the demographic challenges and not only maintain, but grow visitation levels over time. To this end, NSAA is updating our existing online database of Best Practices found at resorts nationwide that are aimed at converting new generations into lifelong participants. By sharing your effective practices and innovative programs, you are making an invaluable contribution to growing the sport.

No one resort department can meet this challenge on its own. Rather this effort crosses departmental boundaries, and is a call to action for the entire resort. Please take a moment to share this survey and elicit information from the appropriate departments at your resort regarding your overall trial and conversion practices and programs. As you develop new programs or alter your existing ones, we ask that you submit the updated information to NSAA. The form on the link below this letter will be available for you to submit updates. Your participation and willingness to share ideas and practices are greatly appreciated. Thank you again for your contributions to our industry and your efforts to help grow the sport we all enjoy.

Sincerely,

Michael Berry
NSAA President

NSAA - Model for Growth

In May 2000, The Model for Growth was introduced as a method for critically analyzing the future of the ski/snowboard industry. You'll recall that the initial value of the Model was its ability to identify and quantify the impacts of various obstacles that needed to be overcome to grow the sport-unfavorable demographic trends, time poverty, increased alternative leisure activities and an overweight population. Resorts have responded by developing a variety of "hardware" methods to combat these issues: state-of-the-art learning centers, ticket, lesson and equipment deals, increased attention to beginner equipment and employee incentives. In return, more first timers are trying snowsports. In fact, trial has actually maxed at a number of resorts near urban centers, especially during peak times. While these tangible efforts are encouraging, conversion has emerged as the predominant roadblock in the industry's ultimate goal of growing the sport by 10 percent.....read more

Recognizing this, a "Phase II" of the growth model study has been developed. The program is designed to sustain the momentum created by the Model and to build upon its points to maximize resorts' ability to attract and, more importantly, convert new participants.

Deliverables: ** (** NSAA Members can view/download the below information by logging into their account using their member login and password.)

Phase II: Summary of Pro Panel and Consumer Panel meetings - 09.2002

Phase II: Ten Strategies for Conversion - 11.2002

Phase II: Overview of Beginner Research Findings - 03.2003

Final Synthesis of Findings - 07.2003

Youth Focus Group - 10.2003

Building Momentum: Findings from the NSAA Test Sites - 03.2004

The Way We Grow 05.06

Part I - The Drivers for Industry Growth

Part II - The Regional Models for Growth

Part III - The Net Promoter Concept

Part IV - A Look at Future Directions

Future Demographics Series Supplement 05.08

Part I - U.S. Population Trends

Part II - The Northeast

Part III - The New South

Part IV - Middle America

Part V - The West

NSAA - Model for Growth

The NSAA Model for Growth grew out of NSAA's and RRC Associates' efforts to develop a method for critically analyzing the future of the ski/snowboard industry. A significant part of the analysis was to identify the obstacles that need to be overcome in order to grow the sports over the next 15 years. The Model quantifies the impact on skier visits of factors such as unfavorable demographic trends, increasing "time poverty" among a major portion of our population, and ongoing climate change. Also documented is the explosion of alternative leisure-time activities that range from golf, cruise ships and gaming to various types of international and domestic travel, amusement parks, sporting events, movies, and school-related activities that hinder the ability of families to travel during the winter. The initial value of the Model was its ability to both identify and quantify the impacts of these factors with respect to the ski industry, and to project what would happen over time were the industry to continue to operate as it has over the past 30 years.

At the risk of oversimplification, if individual resorts can focus attention on providing the best overall experience for guests new to the sport or, for that matter, those new to the resort, over time skier/snowboarder visits will grow substantially. As an industry, we convert only about 15 percent of first-timers into long-term participants. Individual areas should continue to improve the quality of their ski area operations, product improvements and marketing incentives. If they can add to these efforts, a renewed focused commitment to growing their first-time skiers and snowboarders by 6 percent annually and gradually improving the conversion rate from 15 percent to 25 percent, the industry can accomplish the overall turnaround that is badly needed.

Resorts have responded by developing a variety of "hardware" methods to combat these issues: state-of-the-art learning centers, ticket, lesson and equipment deals, increased attention to beginner equipment and employee incentives. In return, more first timers are trying snowsports. In fact, trial has actually maxed at a number of resorts near urban centers, especially during peak times. While these tangible efforts are encouraging, conversion ("software issues") has emerged as the predominant roadblock in the industry's ultimate goal of growing the sport by 10 percent. The intangible "psychology of conversion" and the "golden hour" between trial and conversion must be more effectively addressed.

Recognizing this, the next stage of the growth model study was developed. The program is designed to sustain the momentum created by the Model and to build upon its points to maximize resorts' ability to attract and, more importantly, convert new participants.

This stage will provide blueprints for resorts to dramatically improve their learn-to-ski/ride program quality and penetration by tapping into the industry's best ideas. These insights will be integrated with those of a consumer panel to test the effectiveness of both best practices and ideas. A monitoring process measuring the successes of these ideas will be developed and instituted in a manner by which all resorts may benefit.

NSAA - Model for Growth

A panel of key ski school managers and directors who have focused their efforts on creating innovative beginner programs, both alpine and snowboard, was created. Approximately 15 such individuals representing all regions were included. This panel met in July 2002 to probe learning programs and experiences to understand specifically what techniques and procedures worked best from a teaching and a conversion standpoint. Each major component of the lesson process and structure of the learning process was evaluated.

Additionally, a panel of recent consumers was separately convened. These consumer panels from various regions of the country were comprised of individuals that have recently completed a beginner lesson or package of lessons. This group had definite ideas of what worked for them and what did not, from a consumer point of view. Also, this group offered different perspectives on the new ideas and concepts developed by the first panel of professionals. The objective of this second panel was to systematically diagnose their recent learning experiences and test specific recommendations for improvement (generated by the professional panel).

The ideas and recommendations generated by the professionals and consumer groups were synthesized into a detailed conversion "cookbook" that was distributed to a limited number of test sites. Each of these test sites also received a procedural manual containing specific methods for evaluation of success via a combination of qualitative and quantitative research techniques. As the program is administered throughout the season, feedback will be obtained from the test site ski/board school managers, related personnel, and consumers to determine how well these programs perform.

A summary report at the conclusion of the season will evaluate the performance of these programs and offer suggestions for additional refinements. Relative successes among programs will continue to be monitored and resorts will be encouraged to customize and integrate new ideas into existing programs.

This will be an ongoing process. As more areas adopt the recommendations of the new learn-to-ski/ride programs, the monitoring and refinement process will be expanded accordingly. Ski school managers and instructors will again be brought into the evaluation process to provide organized feedback into how particular innovations have worked for students and what suggestions they might make to improve conversion. Similarly, program participants (new skiers/riders) will be contacted through surveys to provide specific feedback about best practices and their commitment to continue participating in snowsports.

The research will continue to focus on development of tracking methodology in order to measure success and clarify where the industry is in meeting its goals. If we can work cooperatively to communicate with one another our best learning practices and successes, and collectively strive to achieve the best initial experiences for new customers, we will succeed in our effort to dramatically improve on the number of people who will develop a love of snowsports.