

Encouraging More People to Take up Snow Sports

The snow sports sector is beset by many problems. One of the most important objectives for the sector is to find effective ways to increase the number of people taking up snow sports. In all sports, the majority of people who take up any given sport follow a cycle in which they progressively become more enthusiastic and improve their technical skills, and then, at some point, their interest tapers off and they give up the sport. In fact, there are not that many people who continue to practice a particular sport throughout their lives. Consequently, if a balance is attained between the number of people who become tired of the sport and give it up versus those who take up the sport, the actual playing population tends to remain stable. However, if the number of people leaving the sport is larger than new entries to the sport, the playing population declines.

According to a study on nationwide ski resort customer utilization rates undertaken every year by Nippon Cable Co., Ltd., in the last season, it was found that the number of snowboarders engaging in the sport for the first time accounted for about 15% of all snowboarders. Regarding the skiing population, the number trying skiing for the first time was about 3%. If we cannot persuade the snowboarder to enjoy the sport for about 6.7 years on average, and skiers to continue the sport for about 33 years on average, the population practicing these sports will decline.

In the case of snowboarders, the average duration of people engaging in the sport is 4.3 years, and so if we can get them to continue for another 2.4 years, the population would remain stable. This is probably achievable.

However, the survey showed that, on average, these skiers had been engaged in this sport for about 15.5 years, and so it appears difficult to expect them to continue for another 18 years. If the percentage of new entries to the sport of skiing continues at this low level, it is anticipated that the number of skiers will continue to decrease. Consequently, it is necessary to devise new snow sports without delay, and so put a stop to the structural decline in the number of people participating in snow sports.

For a long time now, advertising theory has advocated the AIDMA hierarchy to motivate people to buy, and according to this, it is necessary to use advertising to get people to follow this hierarchy.

A stands for Attention, I is for Interest, D is for Desire, M is for Motivation, and A is for Action. Thus, advertising is used to get people's attention, to generate interest, to engender desire, to create motivation and so to trigger positive action in the form of a purchase.

When we consider how best to increase the number of new entries into the snow sports sector, we may well find useful hints in the AIDMA system.

What do we need to do in order to attract people to purchase the snow sports product? What do we currently lack? Let's think about this as we follow the logic of the AIDMA system.

First "Attention". How best to focus public attention on snow sports! In years gone by when there was not much demand for winter leisure, many people had the fixed impression that winter leisure meant skiing. With the advent of the cold weather, people tended to think of skiing. Skiing was also the most attractive and sophisticated winter sport. However, leisure today is very diverse, and these days many people visit marine resorts in the winter. It would appear that people no longer associate winter with snow sports alone. Thus, unless we send out a lot more information on

snow sports, in this day and age, we will not be able to focus the attention of the consumers on snow sports. However, currently it is manifestly obvious that dissemination of information on snow sports is insufficient.

Next is "Interest". Looking at a White Paper on leisure, there is a fair proportion of young people in the teens and twenties bracket who are interested in trying snow sports. Unfortunately, there is not a real boom in interest in snow sports over the entire age spectrum. However, there is some latent interest in snow sports, and this interest is quite buoyant, especially among the younger generation. But, there remains a question as to if we in this sector are doing enough to ensure that their high level of interest actually leads on to the desire stage. We have not yet reached the stage where we are able to make people understand the enjoyment, pleasure and desirability of snow sports, and so motivate many people to try snow sports. So, although many people think that snow sports may well be interesting, they have not yet progressed to the desire stage where they want to try these snow sports. It is thought that we can motivate people by making a wide array of information available to them. Thus, it is absolutely essential to increase information on the world of snow sports available to the public through advertising, related events, training snow sports participants and honing their skills, focusing the spotlight on snow sports and developing new and attractive promotion materials and so generating more desire.

"Motivation" means to devise concrete ways and means of encouraging people to take up snow sports. Naturally, snow sports can only be enjoyed on snowy hills and mountains, and it is not easy to attract people with no previous experience of snow sports to such locations. Even in the case of those who have the desire to try snow sports, it is extremely difficult to persuade people with no experience to come to the snow sports venues as individuals or in small groups. So, our only realistic hope is to arrange for experienced people to act as guides and bring these uninitiated people to the snow sports areas. If we are able to encourage school groups to come and try snow sports, this might well motivate the children to take up these sports. The people who undertake to bring novices to these snow sports venues would want to be sure in their minds that the ski slope management side would be ready and able to ensure the safety of these groups of beginners. However, in Japan, the management executives of ski slopes are not in a position to fully ensure the safety of novices and inexperienced participants in these sports.

In terms of slope characteristics, lift equipment and the operating systems, rental ski equipment, rest areas, and ski schools and lesson systems, there are not many ski slopes able to say that they are fully prepared to accept such beginners.

When we think along these lines, we see that there are many obstacles impeding our progress towards the goal of the final "Action" stage. That means the goal of getting absolute beginners to try snow sports for themselves. There are two major objectives involved in overcoming such obstacles. One is to intensify the dissemination of information and the other is to prepare adequate facilities for beginners to learn the sports.

Next, we have to think about the following. When selling things, the objective is attained when the consumer makes a purchase. However, in the case of snow sports, the sale only begins to evolve when we have persuaded people with no experience to venture to the snow sports venues. Thus, it is of vital importance to ensure that inexperienced people who come to the snow sports venues are able to experience skiing and snowboarding without feeling fear, and we must make very

sure that they really enjoy the experience and so become enthusiasts of skiing and/or snowboarding. To do this, it is essential to provide a ski slope where total novices can take the first steps in skiing and snowboarding without feeling anxiety or fear. It is also necessary to provide rental equipment and ski wear for these sports as well as lifts they can use with confidence, and places where they can rest when they need to. In addition, teaching people how to ski or use a snowboard is also a vitally important factor. Unfortunately, the lessons given at Japan's ski resorts are seen as lacking in terms of being able to teach people with zero experience. This means providing kind and courteous tuition so that the students are able to learn how to ski or use snowboards in easy, progressive stages.

Thus, the number of people attending such schools is decreasing.

As a result, people who have been poorly trained by their friends on the slopes are not able to become very skilled in these sports and so do not get the full enjoyment experienced by the skilled skier and snowboarders. Consequently they tend to give up the sport fairly quickly. The fact that this situation has been created is very probably our fault.

Diversification is taking place in winter sports and recreation, and these days there are many rivals to snow sports. We must find some way to develop our ability to persuade more people to enter the snow sports sector so that we can compete more effectively with other industries. The age when people started to participate in skiing on their own volition is long past. Indeed, it is now also necessary to give people some incentive and impetus to take up snowboarding, too. We have to change our thinking and make greater efforts to persuade more people to take up snow sports.

Wintersports

An Analysis of New Participants in Snow Sports

What trends can we see in new entries (participants) in snow sports?

What kinds of problems confront people who first take up snow sports?

Here we have undertaken various analyses of these issues based on a wide range of data and results of field studies.

An analysis of the situation regarding new participants in snow sports

There is a very valuable source of information available to us, a White Paper on leisure (issued by Japan Productivity Center for Socio-Economic Development) which analyzes the prevailing situation regarding the leisure pursuits of Japanese people and indicates long-term trends. According to this White Paper, looking at changes in the percentage of Japanese people participating in sports in the period from 1993 to 2002, as shown in Chart 1, we can clearly see a long-term decline in the participation rates in tennis and skiing. However, when we look at the total participation rate in snow sports (skiing + snowboarding) from 1997 when snowboarding was added to the study, there is no such decline trend in rates. But, looking now at the annual average times of participation, we see that the figures for skiing remained flat from around 1998. However in the case of snowboarding, in recent times, there has been a rapid decline in the number of participations per year. Thus, although there is no drop in the snowboard population per se, it has become a minor pastime, and the number of participations has decreased. The overall number of participations in snowboarding (participating population x number of participations) has ceased to grow. (Chart 2)

Now let's look at changes in the participation rate in snow sports overall by age group. (Chart 3)

Looking at the 20s age group, there are major changes in the participation situation among men in snow sports. And, recently there is an upward trend.

However, regarding women, there is a clearly defined downward trend. Thus, it appears that in recent times, there is a drift away from snow sports on the part of young women.

Looking now at people in their 30s, men show a flat rate, but recently there is a falloff trend among women.

In the 40s and above group, both men and women show a slight upward trend in participation rates.

Trends in participation rates in sports and overseas travel among the 20s age group

Various studies carried out so far show that there is a downward trend in the younger age groups using ski slopes. Now, let us look at the participation rates of people in the 20s age group in other sports and in overseas travel, a rival to resorts in Japan. This is shown in Chart 4.

In addition to skiing, the participation rates of both men and women in tennis and golf show downward trends from the latter half of the 1990s. In fact, there is a general movement away from sports among the younger generation. However, from 2001 onward, we can see an increase in the participation rates of men in snowboarding and women in tennis. After peaking in 1996, the participation rates of both men and women in overseas travel are more or less stationary. So, we cannot really say that the customers of ski resorts are now going on overseas trips. However, regarding women, we need to note that the participation rate in overseas travel is higher than

that for snowboarding.

Changes in the start of participation in skiing and snowboarding

Here we have reanalyzed the data from the annual study on nationwide ski resort customer utilization rates undertaken by Nippon Cable Co., Ltd., and we have focused on changes in the start of participation in skiing and snowboarding. (Chart 5) Comparing data from 1995 to 2003, we can see progressive slight increases in the total of primary school children and younger children as well as in junior high school students. The data for adults shows a downward trend. Thus, less people tend to take up skiing and/or snowboarding after they become adults. The trends show that people who have participated in these sports since they were young children frequently continue to do so.

We can also see a slight downward trend in the number of people who start these sports due to a school trip to a ski resort when they were at senior high school. This also gives rise for concern.

Analysis of new participants

The definition of this is people engaged only in skiing and in their first year of participation plus people engaged only in snowboarding and in their first year of participation in the sport. They are considered to be the new entrants of the season. We analyzed changes in these statistics.

Looking at changes from the 1996 season to the 2003 season, the percentage accounted for by the entry group was already low in 1996 at 5.8%. We can also see that from that time (around 1996) onward, the number of people newly participating in snow sports has declined. From 2002 onward, the percentage rate has fallen to under 5% of total participants. (Chart 6)

Looking at the entry group by domicile region, we can see that the participation rate of people living in Hokkaido, Tohoku and areas subject to snowfall in the Chubu region is low.

It appears that there are upward trends in terms of ski entry groups in the Kanto area and areas immediately to the north of Kanto. In the snowboard entry group, the increases are in the Kinki area and areas to the west of the Kinki region. (Table 1)

Features of the entry group in the last three years and reentry group and problem areas

In the 2003 study on people using ski resorts nationwide, a study was carried out on the snow sports entry group within the last three seasons and the reentry group (people who recommenced after a period of absence). In this study, people were asked why they started (or restarted) snow sports and problems that existed at that time.

The total of the entry group in the last three years and the reentry group accounted for 30%. When this is compared with data for the entry groups of each season, we can see that many people recommence after a fairly long absence.

Looking at an analysis of the domicile areas of both the entry group and reentry group, this is close to the domicile distribution pattern of that of all participants nationwide. However, the rates in Hokkaido and Tohoku are slightly on the low side. Seen by gender, the female group is relatively large. The total of those who started or restarted over the age of 30 is over 20%. (Chart 7)

Looking at the motivation for starting, 31% said they themselves had felt interest, 56% said they were interested and somebody offered to take them to try it. In the case of people living in the Kanto area and the west of Kanto and women in general,

they said that the major motivation was that somebody offered to take them to experience (or to recommence) snow sports. (Chart 8)

Many people living in snow regions and in the Chugoku and west of Chugoku region, said the their first snow sports trip was a one-day trip.

However, many of the people domicile in the three big cities (Tokyo, Osaka, Nagoya) stayed overnight. (Chart 9)

Looking at how people acquire their snow sports wear, 63% purchased their own wear. So, it appears that people like to have their own snow wear when making their grand debut on the ski slopes. (Chart 10)

Regarding sports equipment, 46% rent their gear and 14% borrow it from friends and acquaintances.

Thus, we can see that for people starting out in snow sports, rental services are an important factor.

In particular, people from the Kanto area and those to the west of Kanto, as well as women in general, feel that it is common sense to rent their snow sports equipment when starting out. (Chart 11)

Regarding people who said it was a major undertaking to start or restart snow sports, by far the highest percentage of people said it was "expensive". That was followed by "Long distance", "Cold", and "Bulky to carry around".

Considering just the women, we see high scores for "Cold", "Bulky to carry around", and "Few people (or none) willing to take them". (Chart 12)

Thus, we see that there are many major obstacles to starting snow sports, but once people actually start, or restart, a massive 89% percent said, "I'm glad I did it, and I intend to continue". However, among the women there were double-digit scores of those who said, "I'm not yet sure." We are rather worried about this result. (Chart 13)

Problems arising when first taking someone to ski slopes

In snow sports, the most desirable structure is for people who are already able to ski to take non-skiers to the ski slopes, and for the ski/snowboard population to increase in this way. In reality, 60% of skiers and snowboarders have experience of taking a complete novice to the ski slopes. On such occasions, a minority group of 26% of the experienced people said there were no major problems encountered. However, 74%, that is three out of four people, felt there were problems, mainly in terms of "Lack of practice space" and "No slopes for beginners". That is to say, under the present conditions, there are many problems awaiting those who take novices to the ski slopes. We feel that these factors tend to make people more reluctant to accompany novices to the ski slopes. (Chart 14)