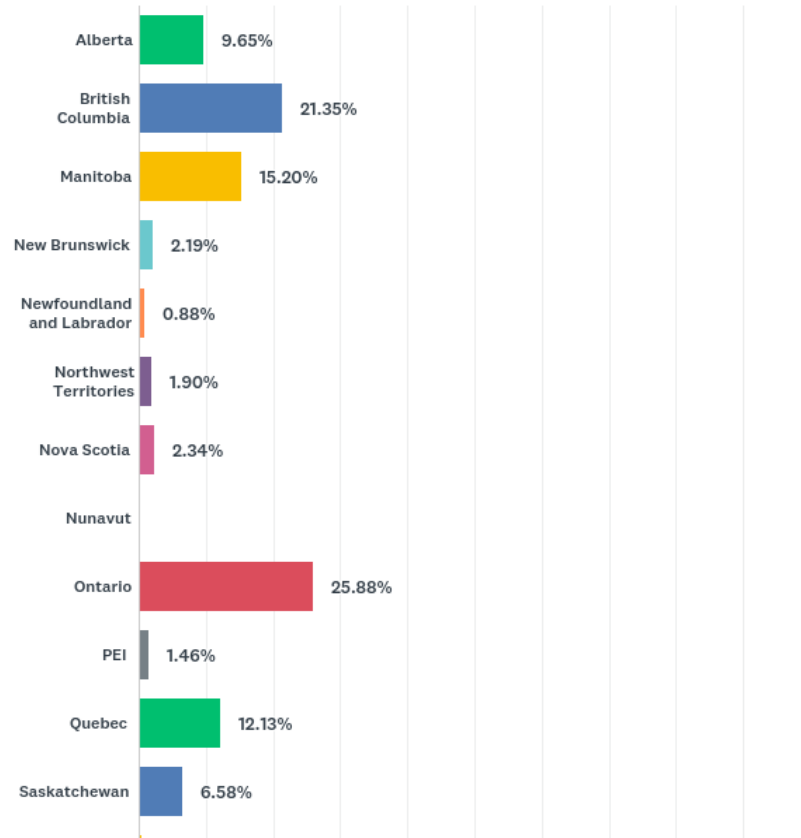


Adult Skier Survey Analysis and ensuing recommendations

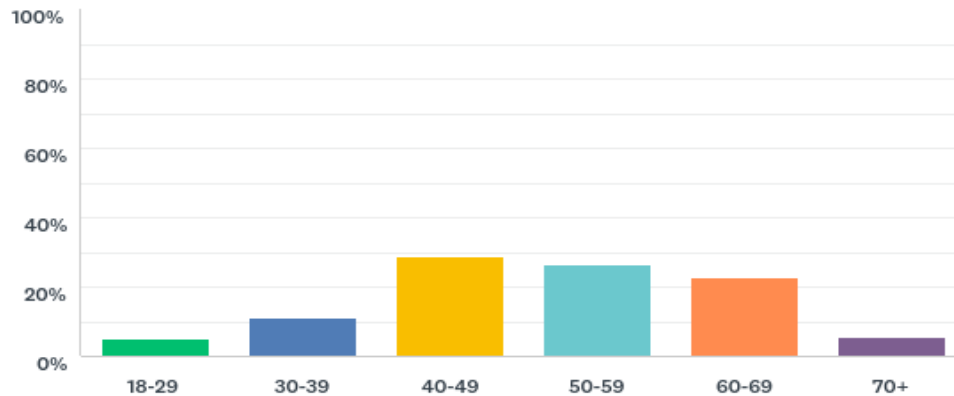
Q1 Your province-territory of residency



Summary and analysis

- 716 total survey respondents. The survey was distributed via Facebook and to divisions by email with the request to forward to affiliated clubs. Logically this survey therefore primarily reached affiliated club members but there was a hope that the survey would also reach non-affiliated club members to a fair degree to reflect a variety of opinions and feedback. 26% of respondents are non-affiliated club members. This is the first survey of its kind, so it is hard to assess the rate of responses, but it provides a first opportunity to identify some common themes and trends from this demographic group.
- Greatest survey engagement from Ontario, BC and Manitoba respectively. Relatively low response from Quebec and Alberta based on division size (or national representation).
- Response numbers might reflect a combination of population size and effectiveness of division-to-club communication.

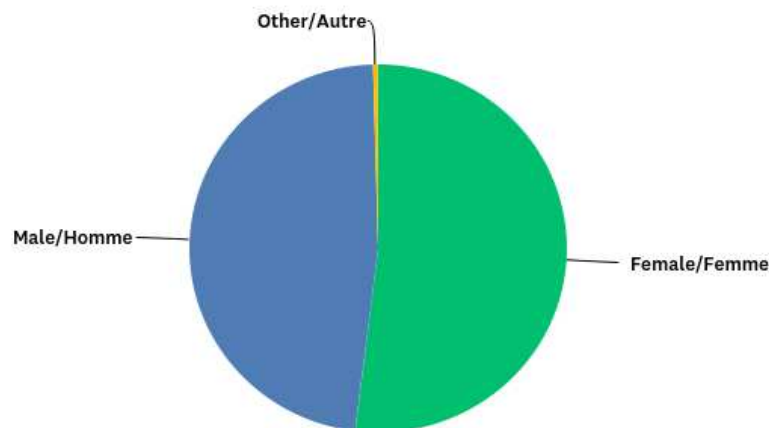
Q2 Your age



Summary and analysis

- 56% of respondents aged 40-59
- 78% of respondents aged 40-69
- This division of respondents per age group is quite reflective of Nordiq Canada's membership at large, which supports the assumption that this survey's results are indeed representative of Nordiq Canada's membership (although this what not a condition to take part in the survey)

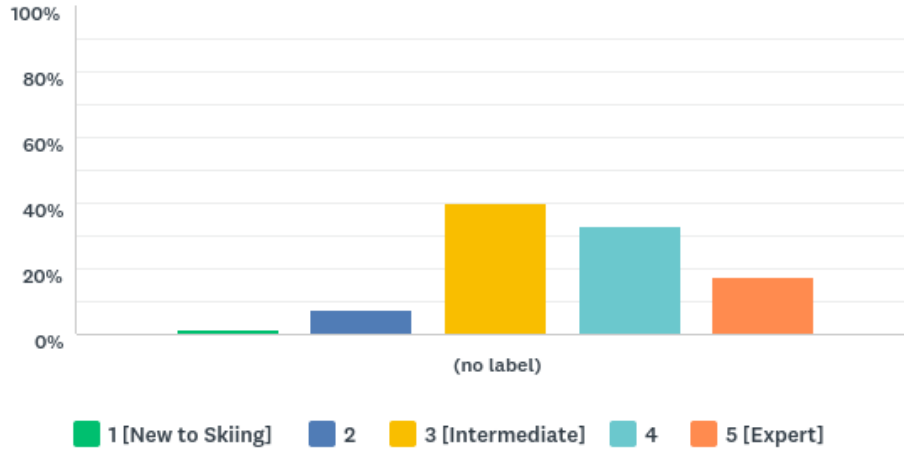
Q3 Your gender



Summary and analysis

- Essentially equal representation between men and women, as per Nordiq Canada's overall membership
- Thus, in general responses should not reflect a gender bias (ps: but that can be verified)

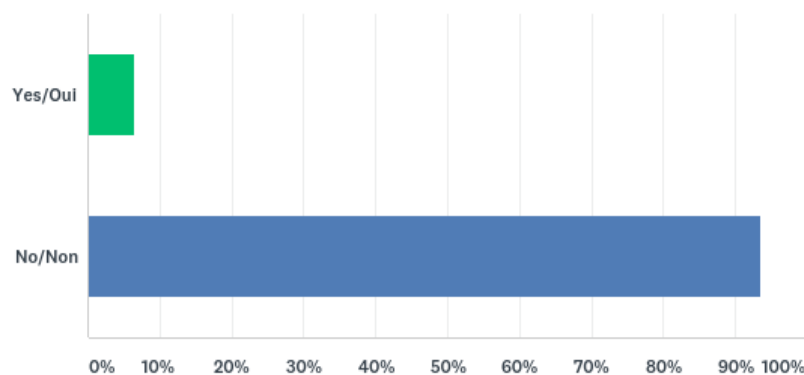
Q4 Please rate your skiing ability level



Summary and analysis

- 91% of respondents rate their ability level as intermediate or greater.
- Given that this survey was primarily distributed via divisions, it is to be expected that most respondents are members of ski clubs and are generally experienced and avid skiers. This assumption is actually confirmed via other questions in this survey.
- This could indicate that this survey is lacking representation from new or novice skiers that were likely harder to reach out to.
- At the same time, if representative of Nordiq Canada's adult membership at large, appreciating that the average adult skier considers him or herself quite advanced technically and highly engaged is an important premise for determining how to best serve this population going forward.

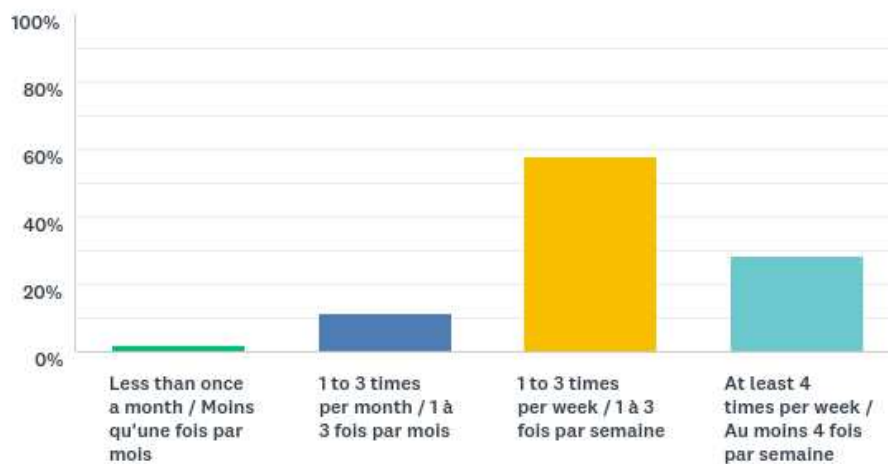
Q5 Are you a provincial and/or national race license holder?



Summary and analysis

- 93% of respondents are not race-license holders. However, of the “No” respondents, 53% answered later in the survey that they partake in one or more loppets (popular mass start races). This likely confirms that most adult skiers are aware that a race license isn’t required to participate in the vast majority of events that adult skiers are interested in and that meet their goals and expectations.
- Accordingly, this fact could suggest an opportunity to engage more with adult skiers via the events that they participate in. As well this may represent an opportunity to make sanctioned events requiring race licenses more welcoming to average adult skiers by adding race formats that better meet their goals and expectations, if this was a sought objective. This strategy may be particularly pertinent for sanctioned racing series struggling to attract enough licensed skiers to make the event viable financially and competitively.

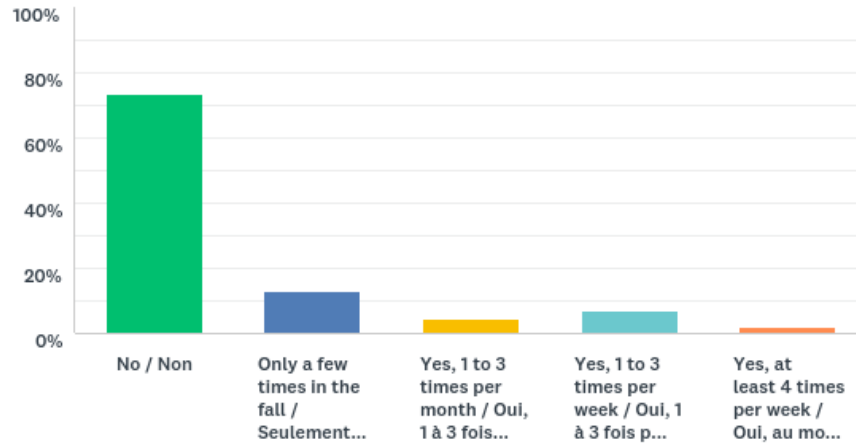
Q6 On average, how often do you ski during the winter?



Summary and analysis

- 86% of respondents ski at least 1-3 times per week. Consistent with question 4, most respondents are avid skiers. Given that most respondents are club members it shouldn’t come as a surprise since club members primary reason to belong to a club is to access groomed trails (see Q10).
- This statistic at least suggests that the skiers reached by this survey are motivated to ski often and could potentially benefit from a number of useful services, programs, or incentives from clubs.
- Whether they represent a large portion of the overall population of cross-country skiers in Canada or not remains unanswered. Finding out the answer to that question appears critical for the ski industry, federations, clubs and other service providers if we want to better meet the needs of this population.

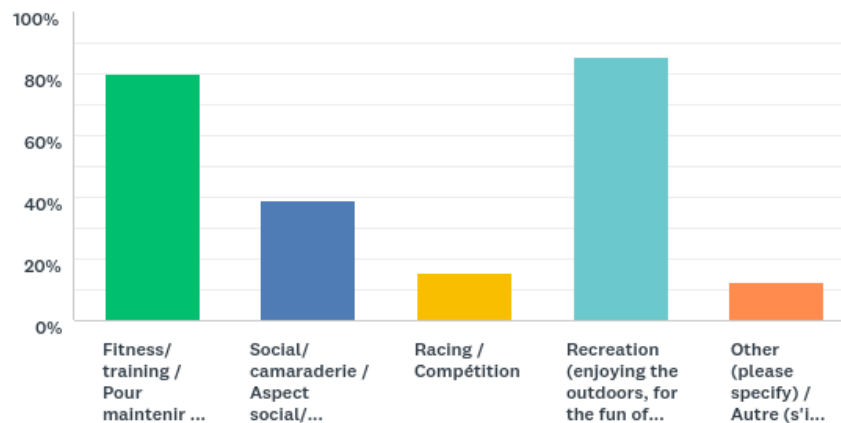
Q7 Do you roller ski during the dryland season?



Summary and analysis

- 26% of respondents roller ski, with the majority only roller skiing during the fall. Given the targeted population by this survey (recreational adult skiers), this appears like a very high proportion of respondents.
- Of the 65 respondents who rollerski at least once per week during the dryland season, 71% take part in at least one event, race or loppet during the ski season. This may represent a strong correlation between the two, ie adult skiers aiming to participate in competitive events in the winter will be more motivated in engaging in ski specific training during the off season.
- This demographic might also represent a group that enjoys xc skiing beyond its traditional form and who are more likely interested in off season ski-specific training. Either way this statistic suggests a potential demand for clubs offering off season programs including roller skiing for adult skiers.

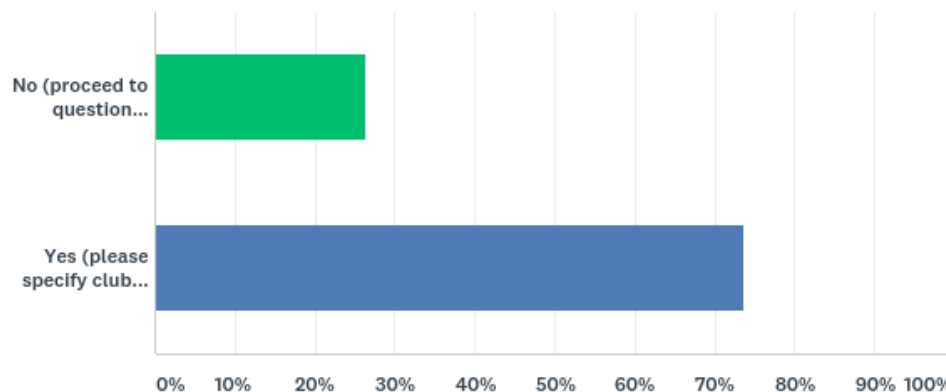
Q8 What is the primary motivation for you to ski? (More than one answer possible, please choose only the most relevant answers)



Summary and analysis

- The two most popular responses were *for the joy of the sport/outdoors* and *health*. The next most popular response was for the social aspect. These answers are reflected in other questions and answers in the survey and highlight three of the most important motivators to keep in mind when building an adult ski program.
- The four categories of answers that appeared in the comments from those who selected *other* were:
 - a. For mental health and to enjoy nature
 - b. To coach
 - c. As a family activity
 - d. To exercise with a dog
- These answers mean that despite a majority of respondents taking part in at least 1 competitive event per winter, racing does not constitute a primary motivation for the majority of respondents for skiing in general. It could also be argued that racing in itself could be part of other main motivators such as Fitness, Enjoying the outdoors and Social considerations.
- Therefore it seems that the element to remember here is that fitness, enjoying the outdoors and camaraderie should be the key considerations for various organizations designing programs aimed at adult skiers.

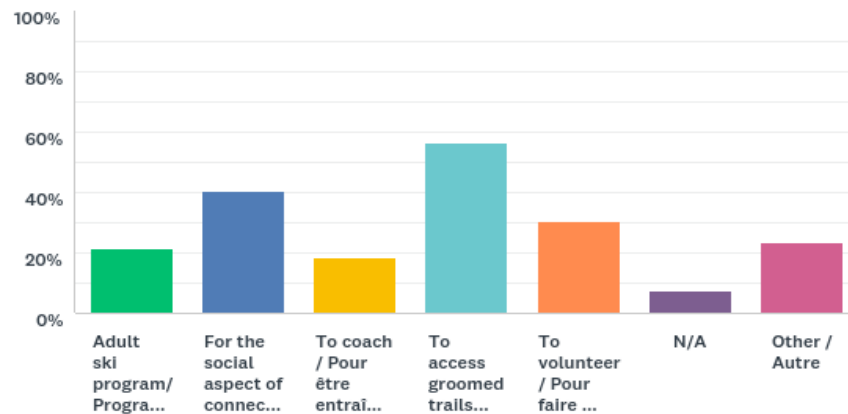
Q9 Are you a member of a cross country ski club?



Summary and analysis

- 74% of respondents are club members but it doesn't mean that all represented clubs are affiliated with their division. That being said, since the survey was mostly distributed via divisions to affiliated clubs, it would be expected that a majority of respondents belong to affiliated clubs.
- 136 clubs had representation in this survey. (There are about 360 Nordiq Canada affiliated clubs on average every year but respondents' clubs may not all be affiliated).
- Following questions in the survey help distinguish between club-members and non-club members on a number of topics.

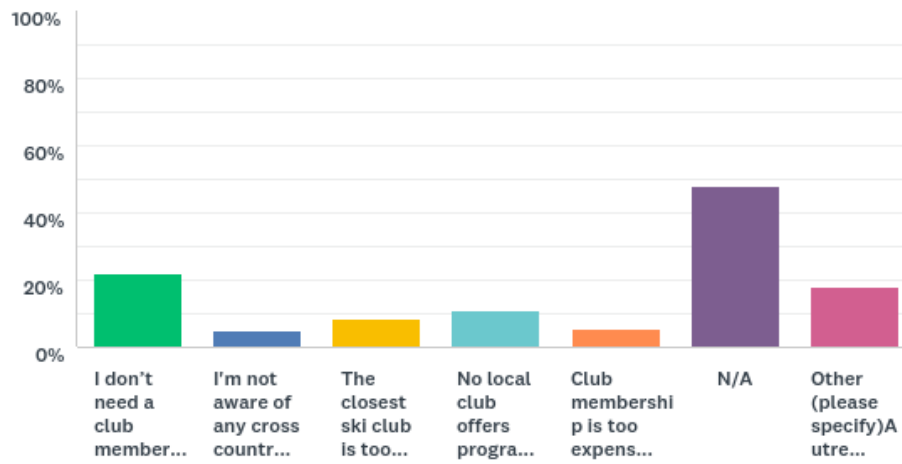
Q10 What are your primary reasons for belonging to a xc ski club? (More than one answer possible)



Summary and analysis

- These answers vary quite a bit by province, but the top two reasons people choose to belong to a club are *to access groomed trails* and for the *social aspect*. Considering the targeted demographic for this survey, this was expected and highlights how simply giving access to a groomed trail network constitutes the main service to skiers of many clubs around the country.
- Of those who answered *To access groomed trails*, 30% were from BC and 27% were from Ontario, the two divisions with the largest membership and highest representation of “recreational” adult skiers.
- A somewhat unexpected theme from the comment section from those who selected *other* was simply - *to support the club* or *to support the trail maintenance and grooming*. People who have some link to the club, either as someone who used to take part in a program, or as someone who has or had kids who are or were part of the club to name a few examples, feel that supporting a club that they think brings value to their community is a good enough reason to pay for a club membership.
- Another very popular answer from the comment section was that people joined the club because they have kids who are in a club program.
- Additional recurring answers that appeared in the *other* comments were: *to ski with a dog*, *to race/ to train for racing*, *to stay fit*, *to take part in group trips/ communal transportation*.

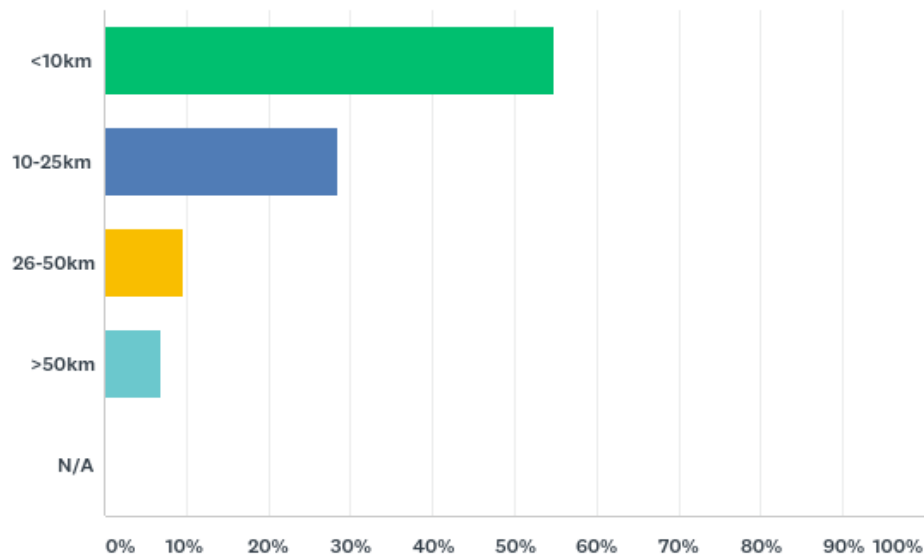
Q11 If you do not belong to a club, what are your reasons for not belonging to a club? (More than one answer possible)



Summary and analysis

- The most common reason people choose to not join a club is because they don't need a club membership to access ski trails (just under 50% of respondents). This answer supports the data that shows that a large portion of club members primarily joins clubs in order to access trails.
- This has important implications: If people can access groomed trails without needing a club membership, it removes an important incentive to join a club. This context seems to be particularly prevalent in big cities across the country where municipalities maintain a significant groomed trail network. For clubs operating in such environments, it appears particularly important to emphasize other types of programs and services pertinent to recreational adult skiers. At the same time, all clubs should benefit from communicating to their members all that they are providing for services and programs beyond access to a trail networks. If adult recreational members are aware of all the other programs and services provided by their local club, other survey answers suggest that they may be more inclined to join a club.
- The people who selected "other" commented that they either prefer to ski at several different locations, or based on the timing and frequency of their outings, it is more economical for them to buy single-day tickets.
- 22% of respondents said that they would not join a club because there were no suitable programs that appealed to them.
- A few people left comments expressing that they were simply uninterested in joining a club or saw no value in a club membership, again supporting the need for clubs to provide pertinent services and programs for this demographic and communicate them to the community.
- A few other comments expressed that the clubs seemed unwelcoming to unskilled newcomers or that the club had become too political.

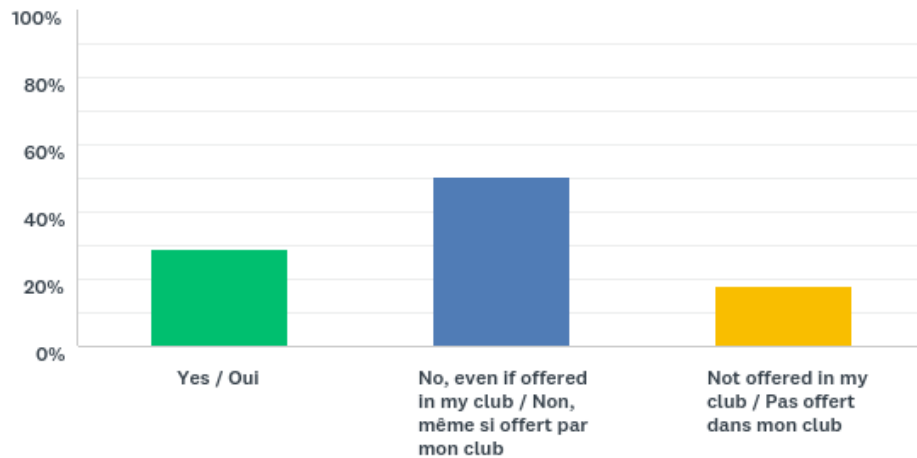
Q12 How far from your residence is the nearest groomed ski trail network?



Summary and analysis

- Over 50% of respondents live less than 10km from a trail network and 83% live within 25km.
- This is representative of the majority of this survey's respondents who identified as club members, and who indicated that the most common reason they join a club is to access a groomed trail network. Naturally, a person who joins a club to access ski trails is likely to live relatively close to that club and trail network.
- Logically this also confirms that xc skiing being an outdoor activity generally requiring groomed trails, the accessibility of such infrastructures in peoples' area is a prevailing condition for club membership.
- This observation therefore suggests that developing new trail networks in areas lacking such infrastructures should normally directly contribute to an increase in club membership.

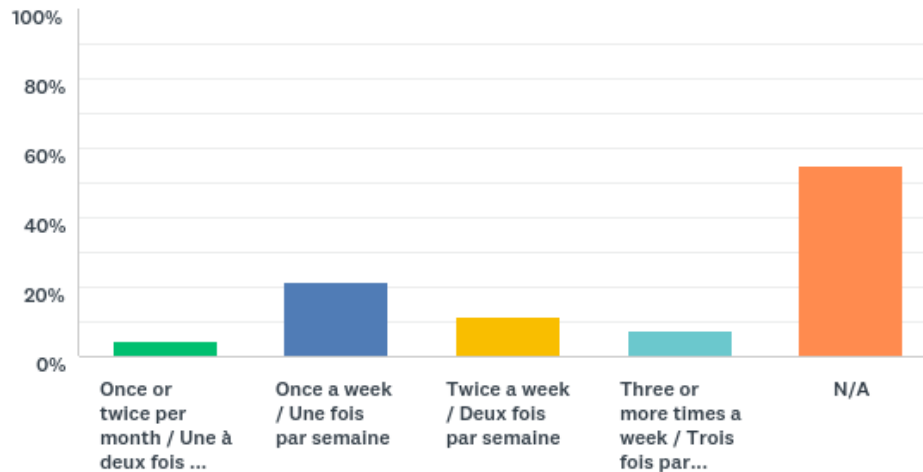
Q13 Do you take part in an adult cross-country ski program?



Summary and analysis

- 50% of respondents answered *no, even if offered in my club*, which could imply potential barriers or missed opportunities to engage adult skiers in club programs.
- The most common remark from the comment section revealed that many individuals feel that there are no programs that cater to, or interest them specifically. Oftentimes the existing groups were perceived to be either too competitive, or too rudimentary.
- Further, some respondents showed interest in joining a program, but found that no programs were offered in their club, or they were unaware of any programs available to them.
- Lastly, many respondents were past participants of a program. Some had felt they had “graduated” out of their group, while others were simply on the fence about joining again. This demonstrates that participant retention is a particular weakness of some adult programs. As demonstrated later in the survey, some key factors for keeping participants interested and coming back for more are a strong social component and opportunities for participants to continually grow and be challenged. These observations would speak to the importance for clubs to better tailor programs to the needs of their members and offer a wider variety of programs. In other words a specific adult skier development pathway that offers a clear progression of programs designed for adult skiers within the club, from recreational beginners to highly competitive master skiers.

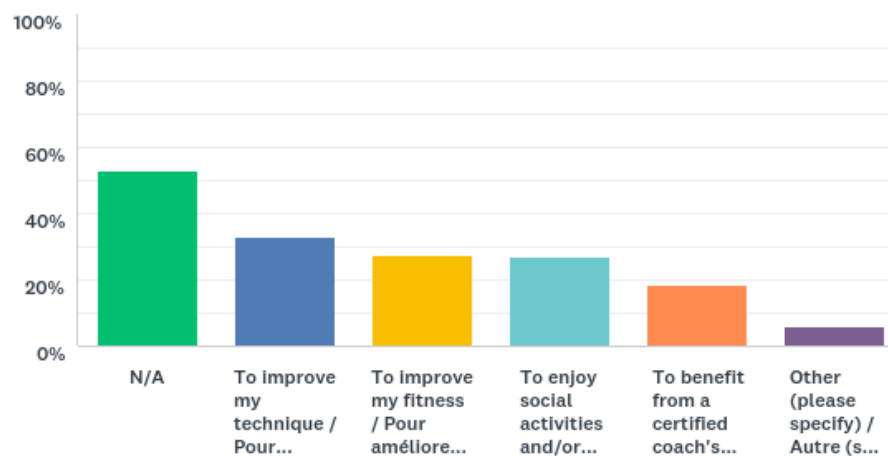
Q14 How often does the above program/group meet between December and April?



Summary and analysis

- Of the respondents who are in a ski group, 90% meet at least once per week. This would indicate that when people do sign up for a ski program, it's for meaningful engagement.
- As a provider of adult skier programs, it appears important for clubs to account for the different situations of this general demographic. For example, working parents might only have time to meet once per week outside of work hours, while a group of mostly retired adults might want to meet more than once per week, on weekdays and weekends.

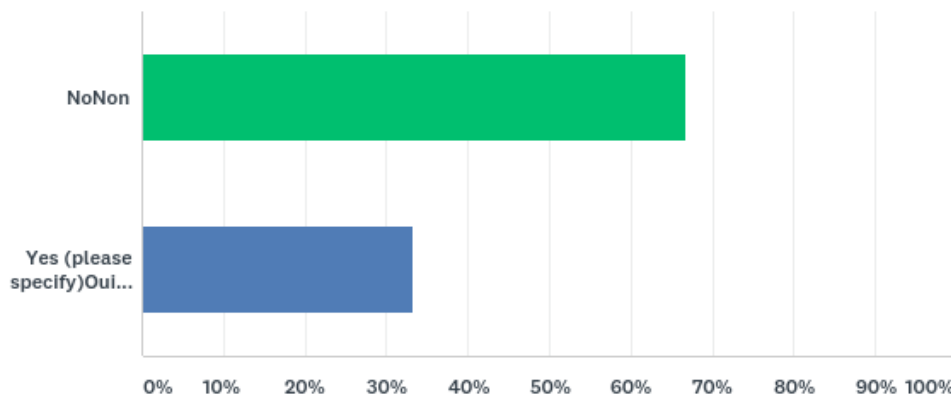
Q15 What are your primary reasons for being in an adult training and/or racing program? (more than one answer possible)



Summary and analysis

- All three options of *to improve my technique*, *to improve my fitness*, and, *for the social aspect*, were ranked practically equally by the survey respondents. These reasons were also reflected in the comment section. Reasons for engaging in cross country skiing in a group setting are multi-faceted and differ from individual to individual, but it is a fair assessment to say that self-improvement, camaraderie and fun are common threads important to everyone. Technique, opportunities for self-improvement and a strong social component are again clearly shown to be key elements of a desirable ski program.
- Additional themes from the comment section included:
 - Adults partaking in a ski program to act as role models for their kids.
 - Adults partaking in a ski program in order to train for events.

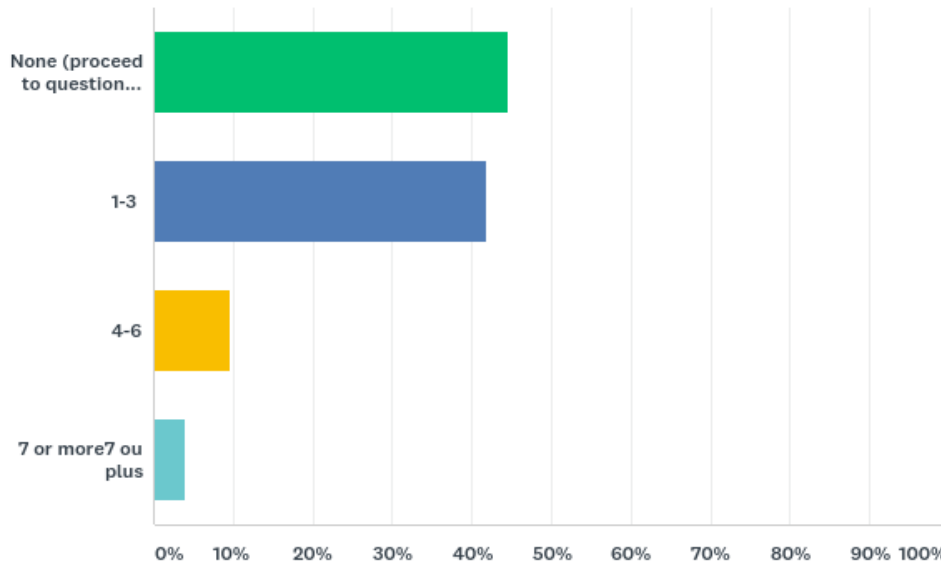
Q16 Do you participate in any dryland season adult training groups, either in xc skiing or within another sporting context, such as adult mountain bike training, or an adult fitness group?



Summary and analysis

- 67% of respondents do not take part in any dryland adult training groups. This is quite consistent with 70% of respondents also not engaged in ski programs in the winter. Although not 100% the same individuals, this statistic confirms that a high proportion of adult skiers are either simply not interested in joining training groups or too few clubs have appealing programs to offer to them.
- Among respondents who do participate in a dryland adult training program, only 46% are part of a ski program during the winter. This demographic has shown that they are keen to engage in sports in a more structured group setting, suggesting that there might be potential to attract the remaining 54% of respondents if similar programs were available to them in the winter.

Q17 How many cross-country ski events do you take part in every winter? (For example: Loppets, citizen races, mass participation events, provincial/territorial or regional racing series, etc).



Summary and analysis

- 55% participate in at least one event per winter.
- Among people who participate in loppets and other events, only 38% are part of an adult ski program while 43% choose to not be part of an adult ski program, even if it is offered in their club.
- These observations suggest that participating in events is more of a common denominator between adult skiers than taking part in an organized ski program. This would suggest benefits in reaching out to this large demographic via events to start with, for the purpose of informing them of available programs from clubs in their area. This could also point to the need for clubs to provide more specific programs to meet adult skiers' needs and expectations. For example, programs designed to prepare adult skiers for events that they prioritize.

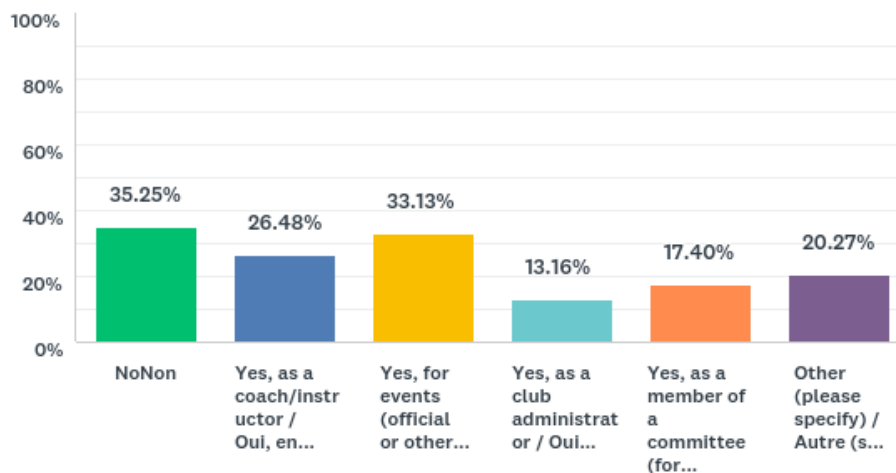
Q18 If you take part in any ski events, which event is the most important to you?



Summary and analysis

- The Gatineau Loppet, the Canadian Ski Marathon and the Canadian Birkebeiner were the most popular events selected by respondents. We could therefore suspect that larger events with higher attendance appeal to adult skiers, giving them a sense of being part of something big and unique.
- This interpretation may suggest that clubs could better meet needs of adult skiers interested in such events by tailoring programs to address the specific demands of long-distance racing.
- Unsurprisingly, local loppets accounted for the overwhelming majority of answers. It is clear that community events are a priority for most skiers looking for an activity that is fun, challenging and community oriented.

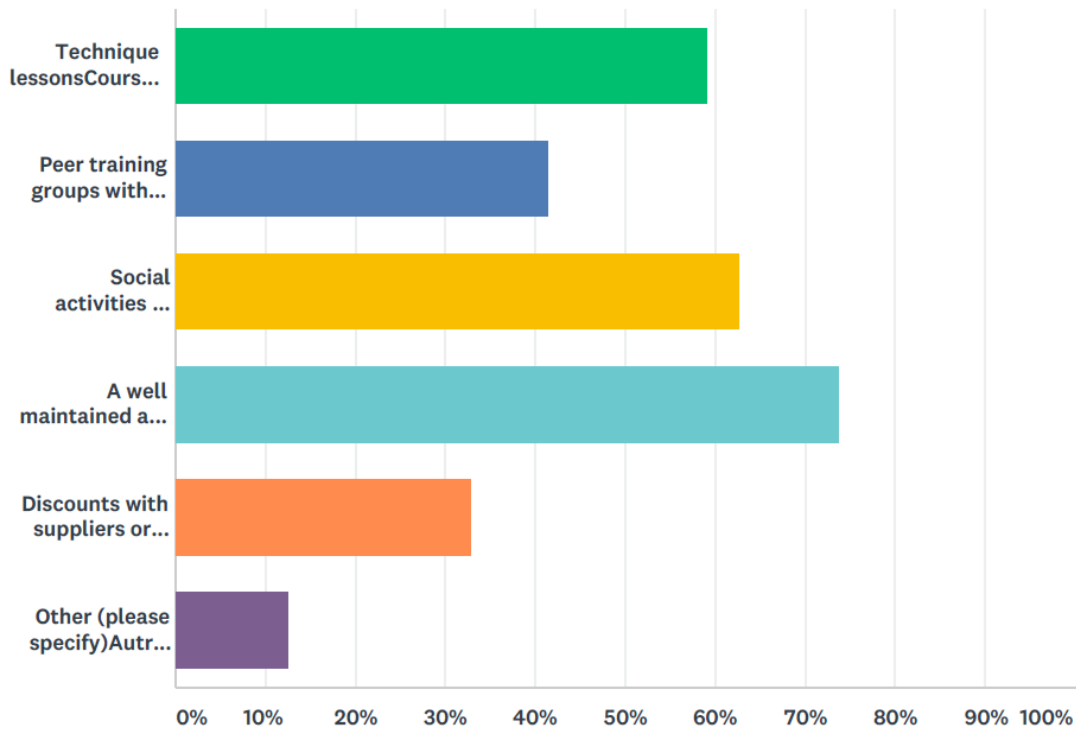
Q19 Do you volunteer in the ski community and in what capacity? (check all that applies)



Summary and analysis

- 65% of respondents do volunteer in some capacity. Given that the targeted group of this survey were simply adult skiers, this seems like a particularly high %. This proportion climbs to 76% when considering only adult skiers that are club members. This demonstrates the strong willingness of adult skiers to volunteer when asked, regardless of their level of engagement in club programs or not. Adult skiers engaged in club programs represent a significant portion of a club's volunteer base, logically.
- The most common volunteer role represented in the "other" comment section was volunteer trail maintenance and grooming. People are keen to invest time into a project that they enjoy and possibly benefit from personally.

Q20 What should a club offer that would give you reason to join? (check all that applies)



Summary and analysis

- The top answer was *a well maintained ski trail network* (74%) - the foundation of any club is great ski trails. Trail maintenance seems to be a worthy investment for a club to attract and keep members and should probably be highlighted as such when members pay for their club or program membership (if the trails are indeed maintained by the club and not an external body).
- Following closely behind, *social activities, informal group ski outings* and *technique lessons* were all emphasized as factors in attracting people to a ski club. These responses are especially relevant to clubs who do not manage their own trail network. People are also largely motivated by self-improvement and the camaraderie they can find in a club.
- Relative to the other answers, *discounts* or *financial incentives* ranked as less important to the survey respondents but could maybe persuade people who are on the fence to sign up.
- Additionally, there were many good ideas left in the comment section that people would like their local club to implement. Summarized, they are:
 - Many respondents mentioned that improved facilities would enhance their experience. Eg. a clubhouse (also promotes camaraderie), bathrooms, and lit trail loops.

- Inclusive (not necessarily competitive) activities, peer ski groups, fun events - all of these answers point toward a desire for a vibrant and socially connected ski community. People want opportunities to connect with one another.
 - Accessibility and cooperative transportation. Many people mentioned a desire for carpooling or organized trips to other ski destinations (either in the area, or a province/ territory over).
 - A few respondents expressed a desire for more flexible trail access passes, eg. a weekday pass, night-only pass, a senior's pass, or a discount system to ski at neighboring trail networks.
 - A few also mentioned a desire for urban trails (ie in Calgary, GTA and Thunder Bay)
 - Ski rentals and a yearly ski swap.
 - Inclusive programming for minorities and marginalized groups (eg. new immigrants, indigenous peoples, people with physical or cognitive limitations).
 - A dog loop.
 - Young parent groups with a rotation of one parent a week who babysits while the other parents ski.
- The prevailing theme was a desire for social connections with peers.

Q21 Please share any other comments or suggestions you may have about adult/master skiing, (eg. perceived barriers to participation or enjoyment, etc).

What people have expressed over and over throughout this survey is the importance of social connections. They want to feel that they are a part of the ski community and they want to ski with peers of a similar skill level (but not necessarily take part in programs per se). This can be achieved either through a formal club program well tailored to their needs and expectations or just a ski group. Ski groups are an important consideration for clubs that may be lacking volunteer coaches or are unable to afford to pay a coach for an adult program.

It might be particularly important for clubs in areas where there are other trails (especially if they are free to access) to focus on further motivations to join a club, as stated above.

People are seeking programs that are suitable to their ability level and that align with their goals. There seem to be four key group levels that might suffice to meet the needs of most people: a novice or learn-to-ski program, an intermediate level program (social emphasis especially important for this group. Many feel they are too advanced for a novice program, but feel unwelcome in more advanced programs and thus feel excluded), an advanced recreational program (non-competitive, more emphasis on technique, enjoyment and perhaps fitness), and finally an advanced racing-oriented program. Of course there are many other program formats that may be desired and can work for a club, however these seem to correspond to four core demands/goals. As an additional example though, a "My First Loppet" style of program directed at intermediate level skiers looks like it could be a very good fit and meet an array of wishes

expressed by our survey respondents. This group could prepare skiers for their first loppet by uniting people behind a shared goal, they could be provided with guidance and basic training, and they could have their first loppet logistically planned and supported by the club.

Additional to the social aspect, people also expressed a desire for technique lessons and opportunities for self-improvement. This points us toward an interesting observation of the current Long Term Athlete Development (LTAD) pathway, which describes Active for Life as the final stage, and frames it as a destination that one arrives at. Active for Life is broken down into three sub-categories. They are: a) Competitive for Life, b) Fit for Life and c) Sport and Physical Activity Leaders. It implies that people move into one of these three sub-stages from a competitive background at any point in time along the LTAD pathway. The original LTAD model was created as a pathway to develop and support participants from a young age to the high performance level but what we are seeing is an opportunity to design a similar pathway for adult skiers within the Active for Life stage. This could very well provide the guidance that the ski community and ski clubs in particular need to better meet the expectations of adult skiers of all levels, genders and age.

Additionally, there is currently no specific pathway for adult coaching. When it comes to formal training and certification, there are two primary systems that are recognized and used by people wishing to be coaches, instructors, or program leaders. They are the Canadian Association of Nordic Ski Instructors (CANSI) which focuses primarily on teaching technique, and the National Coaching Certification Program (NCCP) which aims to develop coaches of participants fitting the traditional LTAD pathway (youth to elite skiers). The first stages of the NCCP pathway are aligned with LTAD stages and thus focus on the needs of young participants at early stages of development. Neither CANSI or the NCCP offer coach training that addresses the unique needs of adult and Master skiers. This could suggest a need to develop a complementary coach training specifically designed for supporting adult skiers of all levels.

Some barriers to adult participation in skiing identified throughout this survey include (in no particular order):

- Lack of trails. The quality of trails can influence a club's appeal. People are requesting more: skate trails, lit trails, skijor trails, snowshoe trails for non-skiing family members.
- Lack of snow. Snow making projects could be considered by clubs lacking consistent and reliable snow, grants could be sought for such projects.
- Lack of ski partners (addressed above, through formal or informal ski groups). Important to think creatively about how to create opportunities for people to meet and interact within a club.
- Lack of transport. People mentioned a desire for urban trails that are more easily accessible in metropolitan centers and more concerted efforts to facilitate communal transportation (eg. carpooling to a local venue, carpooling or hiring a van or bus for trips to further destinations or events).
- Inadequate infrastructure. A clubhouse or indoor washrooms were listed as infrastructure that would entice people to join a club and ski more.



Some secondary wishes expressed by survey respondents were:

- Community oriented events.
- More casual race events. Consider modifying current regional race format to allow for mass starts, separate “age-group” category (instead of Open), option to not be timed (just labelled “finisher”), consider starting races at a more appealing time so that they seem less like an afterthought.
- Weekly casual race series for adults with a dinner and drinks served afterward.
- Adult lessons to be at the same time as the youth SDP (serves young parent 30-39 demographic).
- Varied and affordable membership or trail pass options
- Inclusive recruitment or advertising (indigenous, new immigrant, low-income, para and special Olympic friendly)
- Nordiq Canada recognition
- A more visible loppet scene - embraced and promoted by Nordiq Canada.