

ABOUT SKIING: DEMOGRAPHICS

Skiing's high cost of participation translates into high household-income and an elevated level of education and vocation. Our active audience is mobile, social, environmentally aware and tech-savvy.

- 4.2 million Canadians Skied during the prior winter
- 19.0 million visits to Canadian ski areas
- Skiers are twice as likely to spend \$40,000+ on a vehicle
- 96.3% of skier visits take place in QC, ON, AB and BC
- 74% of Skiers are part of a family household
- \$101,849 average annual household income of alpine skiers is highest of any Sport Group (PMB 2010)
- 45% have Household Income greater than \$100,000
- 59.3% have Household Income greater than \$75,000
- 81% have Household Income greater than \$50,000
- Proportion of Skiers in the 25-34 year (17.2%) and 35-49 year (26.6%) age cohorts exceed the general population.

Actual Adbloc Creative Execution: 13/14 Ski Season



ABOUT SKIING: PSYCHOGRAPHICS

- Young in age & mindset
- Consumer Innovators
- More sociable than the general population
- Highly ambitious
- Competitive
- Educated & influential
- Enjoy sports with intellectual component
- Tenacious
- Ski to “get away from it all”



Travel Stats:

- Skiers are twice as likely to spend \$40,000+ on a vehicle
- Skiers are twice as likely to travel 5+ times domestically
- 40% engage in regular foreign travel
- 70% more likely to travel abroad
- Skiers spend on average \$4,300 on travel annually



Source: SGMA/Liberman Worldwide/NS
MRI Doublebase/Auditbureau of Circulation

Recall Research

Mount St. Louis Moonstone, Ontario

January 10, 2011

- 226 Intercept Interviews
- 68% Male - 32% Female
- 18-24 Years (47%)
25-39 Years (24%)
40-49 Years (21%)
50 + Years (7%)

Sarah Robertson, Researcher



Background

Four (4) Adblocs were installed on the safety bar on all 62 carriers/chairs of the high-speed Louis Express chairlift, one (1) Adbloc immediately in front of each of the 4 seat/skier positions. There were 62 Honda Odyssey ads, 62 Sirius Satellite Radio ads, 62 Cityspace ads and 54 ads for The North Face. Eight (8) Adblocs had no content. Ad distribution was rotated evenly among the 4 seat positions so as to not favour any advertiser or ad.



Research Highlights

Extremely High Unaided Recall of the Ad (73%)

70% Unaided Recall among First-Time* visitors to the venue

73% Unaided Recall - 2 Visits to the venue

81% Unaided Recall 4+ Visits to the Venue

52% of those who saw the Ad Recalled the Honda Brand Unaided

49% Unaided Recall of Honda Among First-Time*Visitors

Total Recall of the Honda Brand 65% (Unaided + Aided)

Male and Female Ad Recall Statistically Equal

Those 24 Years and Under had the highest Recall of the Ad (80%). The 50+ Years Age Segment had the Lowest.



* i.e. First Time skiing at Mount St. Louis Moonstone 2010-2011 Season

The North Face

- 23% of those who saw the Ad Recalled The North Face Brand Unaided
- 24% Unaided Recall of The North Face Among First-Time Visitors to the Venue
- Total Recall of The North Face Brand 33% (Unaided + Aided)
- 20% of Males and 29% of Females Recalled The North Face Brand Unaided
- 26% of those 24 Years and Under Recalled The North Face Unaided while None of those 50+ Years Recalled the Brand

Appendix A - Detailed Research Findings —

Additional Details Attached.