

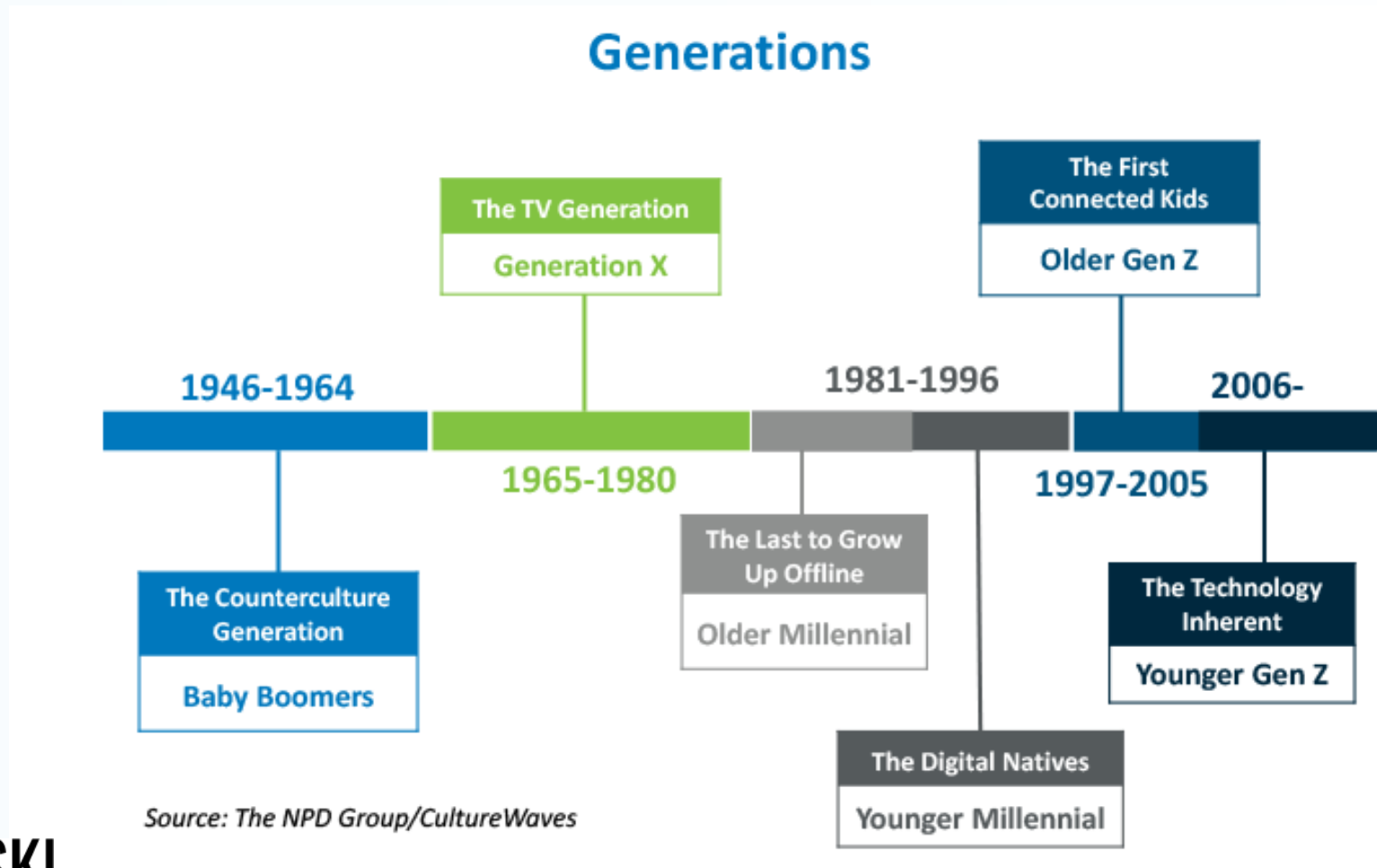
Old Resort: **New Guest**

How the Snow Industry Struggles to Adapt to a Changing Market

Interski Keynote Address 2019: Joe Hession




Our New Guest:



GENERATION Z

The Next Generation



- 1 SOCIAL**
Gen Z is naturally social and spend 7.6 hours per day socializing with friends and family.
- 2 MULTI-TASKERS**
Gen Z prefers to work on multiple tasks at the same time. On average, Gen Z will work off of 5 screens at once.
- 3 ENTREPRENEURS**
Gen Z desires independent work environments. 72% of teens want to start their own business someday.
- 4 EDUCATED**
Gen Z is constantly learning. 1 in 2 will have a college education.
- 5 PHILANTHROPISTS**
Gen Z wants to do good in the world. 93% say that an organization's impact on society affects their decision to work there.
- 6 DIGITAL NATIVES**
Gen Z are the first true natives to the digital era. This generation spends 15.4 hours per week on their smartphones.
- 7 INTERACTIVE**
Gen Z likes to interact with people. 34% are most concerned with boosting their people management skills.
- 8 TECH-SAVVY**
Have a question? Google it. 66% say that technology makes them feel that anything is possible.
- 9 LESS FOCUSED**
Gen Z needs continuous updates and stimulation. It's no surprise that this generation has an attention span of 8 seconds.
- 10 CAUTIOUS**
As a result of growing up during the Great Recession, Gen Z tends to be more careful with their expenses. 57% would rather save their money than spend.

Sources: Forbes, Future Workplace, Huffington Post, iQoo

peopleguru

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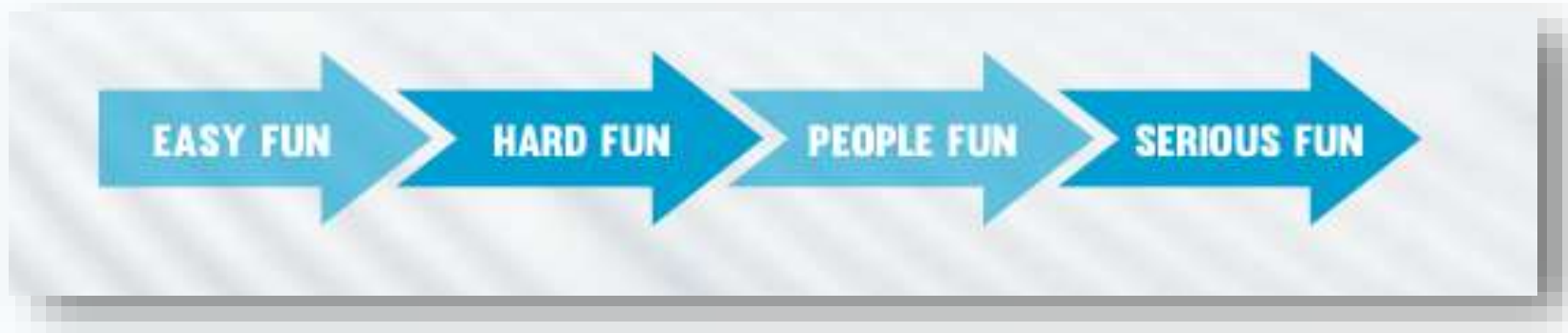
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Science of FUN

The Science of Fun

Fun can be classified into 4 distinct categories:

- **Easy Fun** – Low skill / no skill
- **Hard Fun** – Achievement
- **People Fun** – Social Bonding
- **Serious Fun** - Provides life changing meaning / value



Credit: Nicole Lazzaro XEO Design

Serious FUN – Life Changing



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People FUN – Social Bonding



Easy FUN – Low Skill / No Skill





\$268 Million

Examples of Easy FUN

- ▶ Snow Tubing
 - ▶ 140K vs. 25K
- ▶ Hiking or Strolling
- ▶ Shopping
- ▶ Biking (cruising)
- ▶ Zip Lines
- ▶ Mountain Coasters
- ▶ Movement?





Movement = Easy FUN

Hard FUN – Achievement



Is Mikaela having fun?

Hard FUN:

- ▶ Skiing and Snowboarding is hard FUN
- ▶ Hard FUN is addictive
- ▶ Hard FUN is a lifestyle

This who we are!

Old Resort: **New Guest**

Planning and Designing FUN

Operating Checklist – 3P's

- People
- Product
- Process



proc·ess¹

/ˈprəˌses, ˈprōˌses/

noun

1. a series of actions or steps taken in order to achieve a particular end.

"military operations could jeopardize the peace process"

synonyms: procedure, operation, action, activity, exercise, affair, business, job, task, undertaking

"investigation is a long process"

- Anything that has various inputs that creates a output
- Not all processes are “designed”

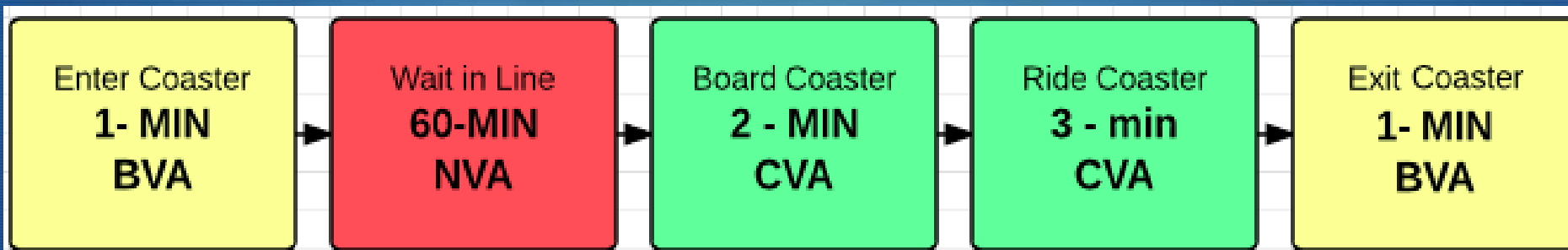
Experiential Efficiency

- The measure of the relative efficiency within the guest experience
- Mathematically:

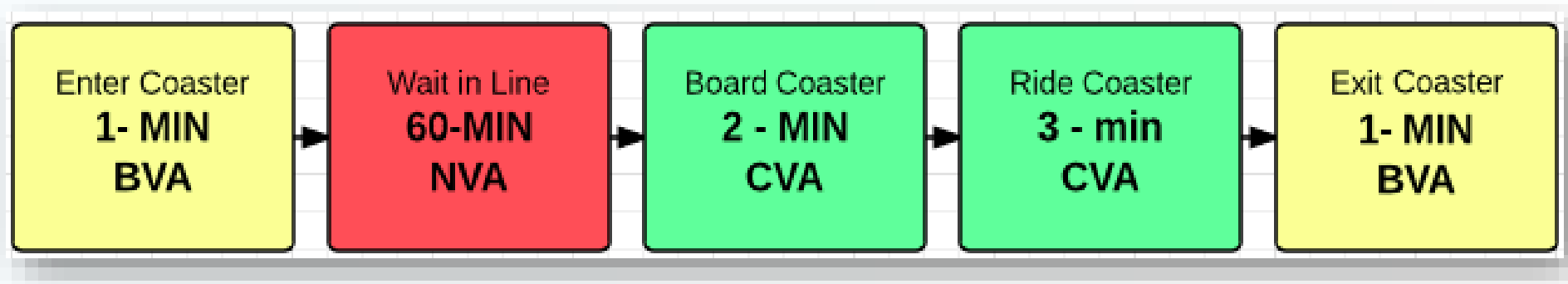
$$\text{Process Cycle Efficiency} = \frac{\text{Customer Value Add Time}}{\text{Process Cycle Time}}$$

CVA, BVA and NVA

- Customer Value Add (CVA)
 - Would a Guest pay for it?
- Business Value Add (BVA)
 - Do we need it for the process? Future?
- Non-Value Add (NVA)
 - Is exactly that...No value to either the Resort or Guest



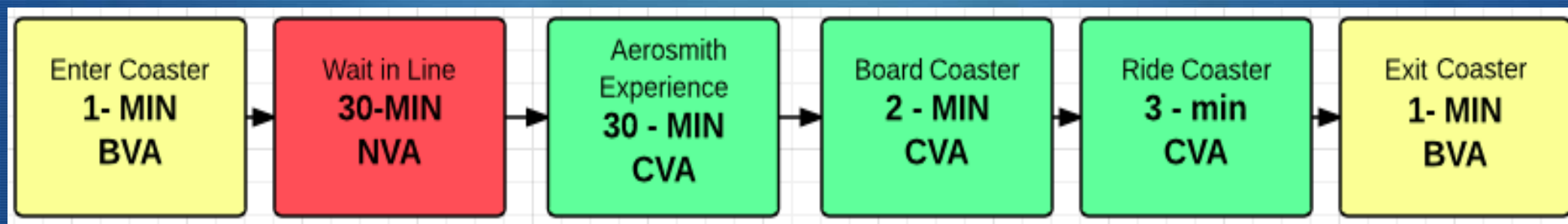
What is the PCE?



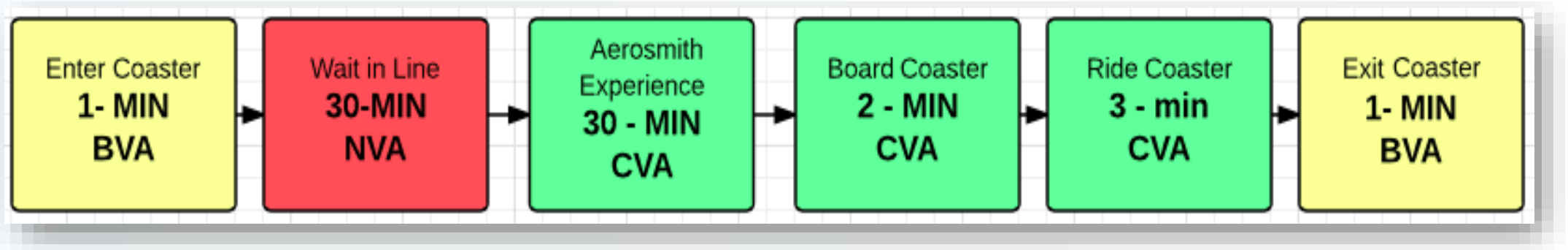
Customer Value Add Time (5MIN)

Process Cycle Time (67 MIN)

$$\text{PCE} = 7.4\%$$



Magic, PCE or Both?



Customer Value Add Time (35MIN)

Process Cycle Time (67 MIN)

PCE = 52.2%

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Terrain Based Learning

SNOW
OPERATING

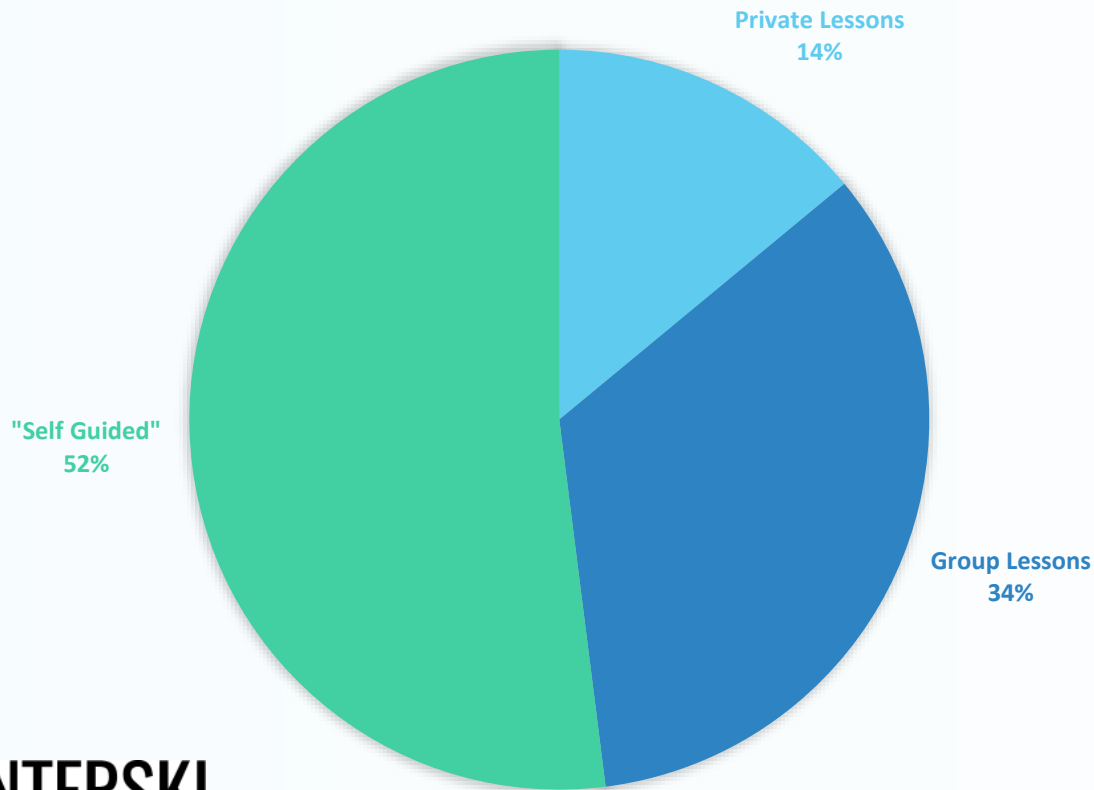


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Adapting to the New Market

What can we learn from the data?

LESSON BREAKDOWN (USA)



Voice of Customer

1. Want to stay together
2. Don't want to wait
3. Just want to "try it"

We are fighting a perception – “I can do this”



The Ice Cream Theory



RESORT LOGO

MINI-PIPE



BUILD BALANCE WHILE SLIDING

- **HERE YOU WILL**
 - Focus on Staying Centered Over Your Equipment
 - Gain Confidence in Sliding
- **READY TO MOVE ON?**
 - Confidently Drop-In and Slide to a Stop
 - Begin to Feel In Control of Your Equipment

NEXT UP: THE ROLLERS ➤



RESORT LOGO

THE ROLLERS



TAKING ON THE FALL LINE WITH CONFIDENCE

- **HERE YOU WILL**
 - Learn How Flexion and Extension of the Legs Can Help Control Speed
 - Travel in the Fall Line for an Extended Period
- **READY TO MOVE ON?**
 - Feeling More Comfortable With Gaining Speed
 - Confidently Attacking the Fall Line and Pumping One Roller to the Next

NEXT UP: BANKED TURNS ➤



RESORT LOGO

BANKED TURNS



TIME TO MAKE YOUR FIRST TURNS!

- **HERE YOU WILL**
 - Let the Terrain Gently Guide You Through Your First Turns
 - Build Skill and Confidence in Controlling Your Own Direction
- **READY TO MOVE ON?**
 - Confidently Link the Banked Turns While Staying Centered on Your Equipment
 - Comfort in Controlling Your Direction by Steering Your Equipment

NEXT UP: PERFECT SLOPE ➤







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Thank you!

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