2019 China Ski Industry White Book

Wu Bin (Benny Wu)

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02.18.2020

Preface

It is a great honour for me to preface this 5th issue of the China Industry White Book. It is with pleasure, but also with some sadness, that I write these lines. Pleasure to see the tremendous growth of the Chinese ski industry over the years, which has been translated in figures for 5 year now by the China Industry White Book. This remarkable work enables to follow the great achievements that have been done over a few years. It is very pleasant to have the chance to see on site new ski resorts popping up and to see the development of already existing resorts, enjoying their new lifts and slopes. But it is also of a great interest to be able to trace this evolution in facts and figures over the years. The Chinese ski industry must have much gratitude towards my dear friend Benny Wu (and his fellow initiator of the former issues Qinghua Wei) to have made available for 5 years now a comprehensive overview of the major industry data. Just looking at some figures since the first 2015 issue of this report, it is amazing to see that the number of ski areas in China grew of more than 200 units over 5 years, that there are currently more than 3 times the number of indoor ski resorts than 5 years ago and that the skiers are now 5 million more than 5 years ago.

But my thoughts are also saddened by the current situation of this 2019/20 winter that has been severely impacted by the spread of the Covid-19 and the disastrous impact it has on the life of millions of fellow Chinese skiers (not to mention the whole Chinese population) and all the actors of the industry. I also personally share a touch of the disappointment of the Chinese ski industry. I was looking forward to my scheduled visit to China for ISPO Beijing 2020 and the opportunity to try for the first time the journey to Chongli with the new high-speed train and attend the first FIS competition on the new downhill centre of Yanqing. Unfortunately, as for all of us, such kinds of projects have been prevented from realising by the virus epidemic.

However, I wish that Chinese ski industry will very soon recover the strength that made it so different from the other mature worldwide ski markets over the last 15 years. I am sure that when the "pause" button will be released, Chinese ski industry will very soon resume to full speed. Sure that numerous skiers are in a hurry to go back to the slopes and enjoy the beauty of skiing, the beauty of the nature, that unfortunately sometimes also develops adversity. And in the ski business, we know that it is sovereign and we do not fully master it, despite technology. The soft reopening of the first Chinese ski areas this week-end already points to a brighter tomorrow.

Laurent Vanat

Geneva, March 2nd, 2020

Preface

China Ski Industry----Growing between the Epidemic and Winter Olympics

With the outbreak of coronavirus disease (COVID-19), China ski industry faces a chilly future overnight. Top events such as the Alpine Skiing World Cup, X Games Chongli, and the 14th National Winter Games of the People's Republic of China have all been postponed. Domestic ski resorts have ceased operations since January 24, 2019 and ISPO Beijing 2020 has been cancelled. Those ski resorts who are ready to pay the greatest enthusiasm to greet the visitors suddenly found nobody to serve at such a long Spring Festival holiday. Meanwhile, tens of thousands of families who have made their reservation of ski resorts have to cancel their tour. For most of domestic ski resorts and skiers, their 19/20 skiing season has already come to a sudden end. Zhang Heng, the founder of Sanfo said, "The outbreak of coronavirus disease caused a lot of damages to the outdoor sports industry, and is even devastating to the ski industry."

It comes to our attention that 2019 China Ski Industry White Book is supposed to demonstrate the data of 2019, but the data of 2020 is already anticipated. Therefore, this white book has also made a forecast of skier visits in 2020 as well as a basic evaluation of the damage brought to ski resorts by the epidemic, which may offer some references to the government and professionals in the ski industry.

The 2022 Winter Olympic Games in Beijing has created opportunities for China ski industry to develop, and then the COVID-19 identified by WHO as a public health emergency of international concern (PHEIC) undoubtedly casts a shadow on the whole industry. Growing between the epidemic and the Winter Olympics, we must strengthen our confidence and believe in the power of the market; on the other hand, we also have a chance to calm down, reflect on ourselves and be practical instead of being Pollyannaish.

This epidemic has pressed the pause key of the market, which has calmed the ski industry down and reminded everyone in the industry to remain true to their original aspiration and resume discovering. Meanwhile, the epidemic will accelerate the industry reshuffle and will strengthen the Matthew Effect in the industry.

Thanks to the full support of China ski industry and the big data provided by Mafengwo and Ctrip, we are able to have a bird's eye view of the ski market.

I would also like to deliver my sincere gratitude to every friend in the ski industry. Though faced with the Spring Festival and the epidemic, you still have overcome difficulties and shared your data to me. It is you who boost the ski industry!

I also appreciate the long-term support and help from the co-writer of previous China Ski Industry White Book---- Mr. Wei Qinghua.

I’ d like to thank those teams who join this white paper project. Here are the teams who took part in this version of white book: Beijing Carving Ice & Snow Industry Research Institute, Antaeus Ski, research team of China Ski Resorts Encyclopedia, Xuezoo Technology(iSNOW/ HIGHSNOW), Cold Mountain, SKI+HUABEI, Mafengwo Ski, Ctrip, JF Dry Ski, SKINOW, Winter Wonderland, Longzhixun, Golden Snowflake Ski Industry Alliance, etc.

Besides, I need to extend my gratitude to the leaders of government and readers of this White Book. It is your suggestions and advice that keep the White Book vigorous.

Meanwhile, I deliver my gratitude to ISPO Beijing Asia Pacific Snow Conference and Mr Laurent Vanat. They have provided official platforms for the white paper to be published: http://www.ispo.com/, http://vanat.ch/publications.shtml.

International Report on Snow & Mountain Tourism - Overview of the Key Industry Figures for Ski Resorts published by Mr Laurent Vanat annually has also offered many methodological instructions to this White Book.

At last, I pay tribute to Mr Luoli, the Chairman of Wanlong Paradise Resort for persevering in producing powder snow regardless of the outbreak of coronavirus disease.

Let us sow the seed of snow and reap the fruit of happiness.

Wu Bin (Benny Wu)
18.02.2020

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Wu Bin (Benny Wu)

02.18.2020

13910969978@163.com

Chapter I Ski Resorts and Skier Visits

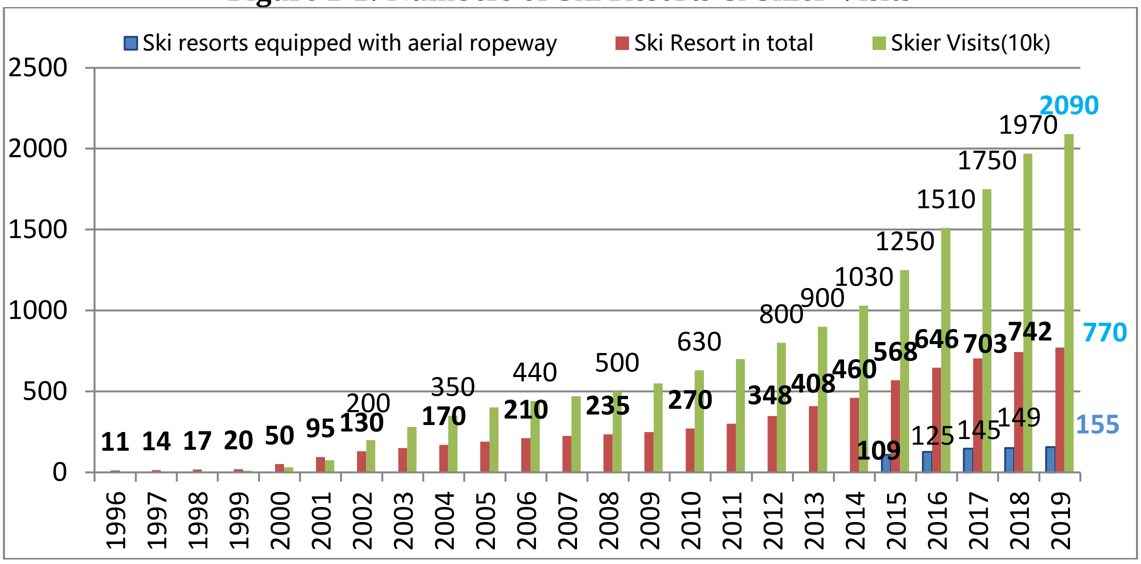
Ski resorts and skier visits are the two poles of the entire ski industry, on which all the business and activities of the ski industry are based. Therefore, the number of ski resorts and skier visits constitute the two core indicators of the ski industry. Based on the status quo of China, we have divided ski resorts into three categories: ski resorts (outdoor ski resorts and indoor ski resorts), dry slopes, and simulated ski gymnasiums.

1.1 Number of Ski Resorts, Skier Visits and Skiers

In 2019, the number of ski resorts increases by 3.77%, with 28 new ski resorts coming into operation, including 5 indoor ski resorts. Among these 28 resorts, five resorts are equipped with the aerial ropeway. Besides, one of the resorts who are already in operation has built aerial ropeway. Till the end of 2019, a total of 770 ski resorts are in operation, and 155 of them are equipped with the aerial ropeway. The number of resorts equipped with aerial ropeway increased by 4.03% compared with 149 in 2018. The number of skier visits increased from 19.7 million in 2018 to 20.9 million in 2019, with a year-on-year growth of 6.09%.

Figure 1-1 shows the changes in the numbers of China's ski resorts and skier visits.

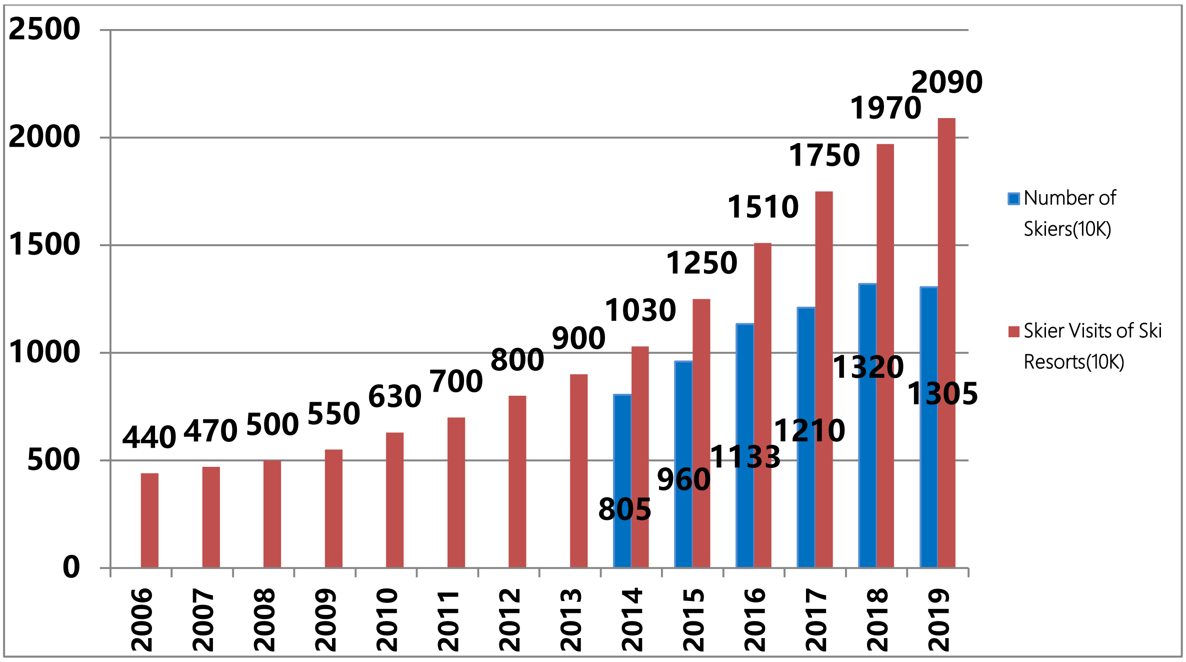
Figure 1-1: Numbers of Ski Resorts & Skier Visits



Note: "ski resorts in total" and "skier visits" in this figure only take outdoor ski resorts and indoor ski resorts skier visits into account. The numbers of dry slopes and ski simulators are excluded.

With the 2022 Winter Olympic Games looming, various ski promotions are developing in depth, and the conversion rate of ski beginners has increased significantly. According to the anticipation of this report, the number of domestic skiers in 2019 is about 13.05 million, which is slightly lower than the 13.2 million in 2018. Among them, the proportion of one-time-only skiers has dropped from 75.38% to 72.04%, and the proportion of ski enthusiasts has increased. In 2019, skiers go skiing in domestic ski resorts for 1.60 times per capita, which is higher than in 2018 for 1.49 times.

Figure 1-2: Numbers of Skiers & Skier Visits



1.2 The Distribution of Ski Resorts and Ski Resorts Visitors

770 ski resorts are distributed in 28 provinces, autonomous regions and municipalities. The top 5 provinces and autonomous regions own the most ski resorts are Heilongjiang, Shandong, Xinjiang, Hebei, and Shanxi. In 2019, Hubei and Xinjiang have the largest number of new ski resorts. See Table 1-1 for details.

Table 1-1: Number of Ski Resorts by Province

Rank	Province	2018 in Total	2019 in total	New in 2019
1	Heilongjiang	124	124	0
2	Shandong	65	67	2
3	Xinjiang	60	65	5
4	Hebei	59	61	2
5	Shanxi	48	49	1
6	Jiliin	43	45	2
7	Henan	43	44	1
8	Inner Mongolia	42	42	0
9	Liaoning	38	38	0
10	Shaanxi	34	35	1
11	Beijing	24	25	1
12	Gansu	21	22	1
13	Zhejiang	19	20	1
14	Jiangsu	17	18	1
15	Chongqing	16	16	0
16	Hubei	11	16	5
17	Ningxia	13	14	1
18	Tianjin	13	13	0
19	Sichuan	11	12	1
20	Guizhou	10	10	0
21	Hunan	9	10	1
22	Qinghai	8	8	0
23	Yunnan	4	5	1
24	Anhui	3	3	0
25	Guangdong	2	3	1
26	Guangxi	2	2	0
27	Jiangxi	2	2	0
28	Fujian	1	1	0
	In total	**742**	**770**	**28**

The distribution of domestic skier visits in 2019 is shown in Table 1-2. The numbers of Hebei, Jilin and Beijing have increased a lot, surpassing Heilongjiang and becoming the top three. Moreover, the numbers of Hebei and Jilin have surpassed **2 million** in 2019. At the same time, the domestic ski market is clearly differentiated in 2019. The numbers of skier visits in 13 provinces have fallen. In addition, series 'Sunac Snow World' of Sunac Group, acquisition of Wanda Indoor Ski Resort, has become a market hotspot. Sunac Snow World in Guangzhou, Wuxi, and Kunming all performed very well.

Table 1-2: Distribution of Skier Visits by Province

	Province	Ski Resorts in total 2019	Skier Visits 2019 (10K)	Percentage	Ski Resorts in total 2018	Skier Visits in 2018 (10K)
1	Hebei	61	243	15.62%	59	210
2	Jilin	45	215	16.85%	43	184
3	Beijing	25	189	7.27%	24	176
4	Heilongjiang	124	186	-16.06%	124	221
5	Xinjiang	65	122	26.88%	60	96
6	Zhejiang	20	111	10.50%	19	100
7	Inner Mongolia	42	101	3.27%	42	98
8	Henan	44	96	2.78%	43	93
9	Shanxi	49	95	-18.01%	48	116
10	Shandong	67	88	-6.38%	65	94
11	Shaanxi	35	74	-9.76%	34	82
12	Sichuan	12	68	-5.28%	11	72
13	Liaoning	38	67	-8.22%	38	73
14	Guangdong	3	65	712.50%	2	8
15	Gansu	22	60	-8.46%	21	65
16	Jiangsu	18	54	45.92%	17	37
17	Tianjin	13	46	4.55%	13	44
18	Hubei	16	43	79.17%	11	24
19	Chongqing	16	35	-12.50%	16	40
20	Hunan	10	34	-14.76%	9	39
21	Guizhou	10	32	-3.03%	10	33
22	Ningxia	14	22	9.00%	13	20
23	Qinghai	8	15	20.00%	8	13
24	Anhui	3	12	20.00%	3	10
25	Yunnan	5	9	8.75%	4	8
26	Guangxi	2	5	-16.67%	2	6
27	Jiangxi	2	4	-20.00%	2	5
28	Fujian	1	2	-50.00%	1	4
	In total	770	2090		742	1970

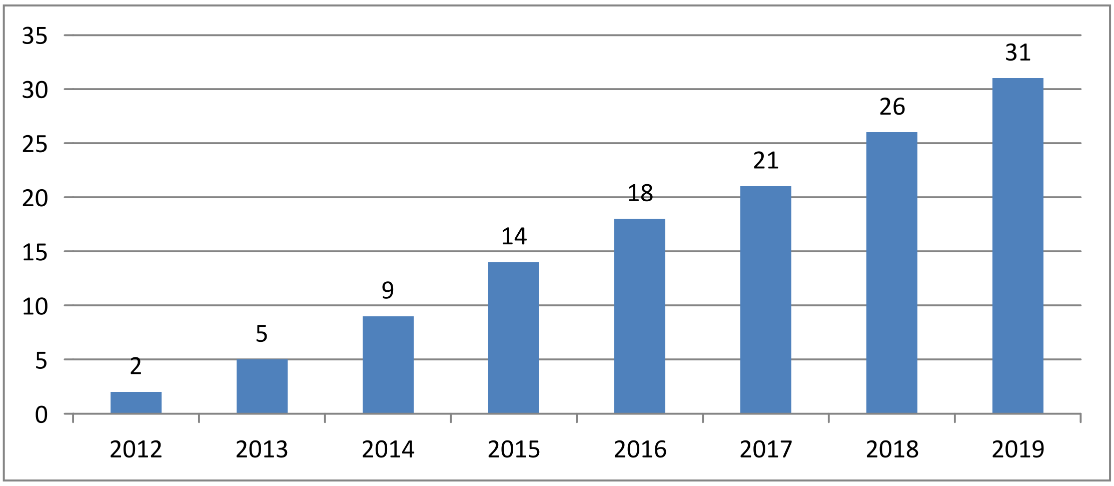
1.3 Classified Statistics of Ski Resorts

In order to understand the characteristics of domestic ski resorts more clearly, this report makes research on the classified statistics of ski resorts from the following dimensions.

1.3.1 Indoor Ski Resorts

There are five indoor ski resorts in the 28 newly operating ski resorts. In China, 31 indoor ski resorts have come into operation till the end of 2019.

Figure 1-3: Number of Indoor Ski Resorts in China



In 2019, the number of all the 31 indoor skier visits is 2,350,000 in total. Among them, the most prominent is Guangzhou Sunac Snow World. With an area of 75,000 square meters, Guangzhou Sunac Snow World is the second-largest indoor ski resort in the world. From its opening on June 15, 2019, to December 31, 2019, Guangzhou Sunac Snow World has received a total of 550,000 skier visits and is expected to become the largest skier visits of indoor ski resorts in the world. At the same time, the performance of Harbin Sunac Snow World (formerly Harbin Wanda Entertainment Snow Park), the world's largest indoor ski resort, is not optimistic in 2019, with a significant drop of visitors.

As can be seen from Table 1-3, the number of skiers in indoor ski resorts increased by 42% in 2019, which is decisive in the increase of ski resorts visitors.

Table 1-3: Number of Indoor Ski Resorts Skier Visits

	Number	Number of Skier Visits in 2019 （10K）	Number of Skier Visits in 2018 （10K）	Increase rate
Indoor Ski Resort	31	235	166	42%
Outdoor Ski Resort	739	1855	1804	3%
In total	770	2090	1970	6%

1.3.2 Destination Resort

Generally, ski resorts can be divided into three categories according to different types of core visitors: one-time experience ski resorts, day-trip ski resorts and destination ski resorts. The proportion of these three categories is 77%, 20% and 3% respectively.

Table 1-4: Classification of Skier Resorts Visitors in China

Type of ski resort	Per.	Target group	Attributes	Resort Feature	Characteristics of Visitors	Cases
One-time Experience ski resorts	77%	Sightseer	Touristic	Basic facilities Equipped with only beginner trails Located in tourist attractions or suburb area	Over 90% are one-time-only visitors average stay: 2 hours.	Xi Ling Snow Mountain Da Ming Mountain Langya Mountain
Day-Trip ski resorts	20%	Tourists from neighboring areas	Athletic Touristic	Little vertical drop Located in suburb areas Equipped with all kinds of trails.	Most are self-driving tourists from neighboring areas Average stay: 3 to 4 hours	Nanshan Mountain/Jundu Mountain/Vanke Shijinglong/Tanluzhe Songding
Destination Resorts	3%	Vocational tourist	Vacation/leisure Athletic Touristic	Considerable vertical drop and land Well-equipped Trails and auxiliary facilities such as accommodation	Visitors usually stay overnight Average stay: one day	Vanke Lake Songhua Resort/ Wanda White Mountain Resort/Beidahu Resort/Yabuli Ski Resort/Wanlong Paradise Resort/Thaiwoo Ski Resort/Fulong Ski Resort/Genting Resort Secret Garden

As for all the 770 ski resorts, about 20 of them are destination resorts and 8 of them are large-scaled destination resorts.

Table 1-5: Statistics of Skier Visits at Destination Ski Resorts

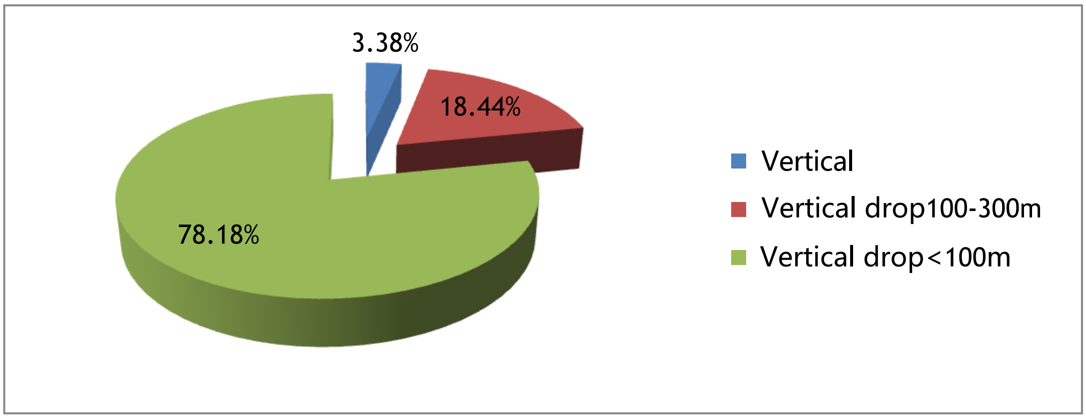
	Number of ski resorts	Skier visits in 2019 (10K)	Skier visits in 2018 (10K)	Growth rate
Large Destination Ski Resort	8	256	195	31%
Medium Destination Ski Resort	12	88	72	22%
In total	770	2090	1970	6%

It can be seen from the table above that the increase in skier visits at Destination Ski Resorts is much larger than the increase at National Ski Resorts. Among them, the increase in skier visits at Large Destination Ski Resorts is much higher than that at Medium Destination Ski Resorts.

1.3.3 The ski resorts that with a vertical drop more than 300 meters

The total vertical drop of a ski slope is yet another indicator for the resources available to a ski resort. According to the actual vertical drop of ski slopes, we could sort ski resorts in the following three categories: resorts with vertical drop of more than 300 meters, which are 26 resorts, accounting for 3.4%; and there are 142 resorts with vertical drop between 100-300 meters, taking up18.44% and there are 602 resorts with vertical drop of less than 100 meters, making up 78.18%. As shown in the following figure:

Figure 1-4: Classification of Ski Resorts by The Vertical Drop



The newly-built National Alpine Ski Center in Yanqing, Beijing is the main alpine skiing venue for the Beijing Winter Olympics. It has a vertical drop of more than 900 meters, and it is currently the highest vertical drop of ski resorts with aerial ropeway in China. In addition, Heilongjiang Yabuli and Jilin Beidahu both have a vertical drop of more than 800 meters. They are the only two ski resorts in China that have hosted the Asian Winter Games. In 2019, ski resorts with a vertical drop of more than 300 meters had 3.64 million visits, increasing by 17% compared to 2018, which is much higher than the growth rate of the total number of skiers in all resorts.

Table 1-6: Skier Visits in Ski Resorts with a Vertical Drop of More Than 300 Meters

	Number of ski resorts	Skier visits in 2019 (10K)	Skier visits in 2018 (10K)	**Growth rate**
Ski resorts with the vertical drop of more than 300 meters	26	364	312	**17%**
Ski resorts in all kinds	770	2090	1970	**6%**

1.3.4. The ski resort with slopes of more than 30 hectares

The coverage of ski slope is another important dimension in measuring the size of the ski resort. As for the end of 2019, there were 30 ski resorts with a total area of more than 30 hectares, accounting for 3.90%. As is shown below for details.

Table 1-7: Number of Ski Resorts by Different Slope Area (2019)

Area of slopes (hectare)	Number of ski resorts	Proportion	Skier Visits in 2019 (10K)	Skier Visits in 2018 (10K)	Growth rate
>100	8	1.04%	478	413	16%
50-100	7	0.91%			
30-50	15	1.95%			
10-30	37	4.81%			
5-10	126	16.36%			
< 5	577	74.94%			
In Total	770	100.00%	2090	1970	6%

1.3.5. The resorts with the aerial ropeway

Whether there is an aerial ropeway in the ski resort is the most intuitive standard when measuring domestic ski resorts. In 2019, there were 155 ski resorts with aerial ropeway in China, increasing by 6 comparing the data of 2018. The focus of this report will increasingly be on ski resorts with aerial ropeways. We use the following table to illustrate the relevant information of ski resorts with lifts.

Table 1-8： Number of Ski Resorts with Aerial Ropeway (2019)

	Number of ski resorts	Skier visits in 2019 (thousand)	Skier visits in 2018 (thousand)	Growth rate
> 4	8	256	195	31%
> 3	23	350	300	17%
> 2	57	615	535	15%
≥ 1	155	1015	904	12%
Detachable lifts	22	354	295	20%
In Total	770	2090	1970	6%

Among them, the 8 ski resorts with 4 or more aerial ropeways coincide precisely with the large-scale destination ski resorts previously showed. As can be seen from the table above, in general, the more ski aerial ropeway the ski resort has, the greater the increase in skier visits. There are 155 ski resorts with aerial ropeways, with a total of 10.15 million skier visits, accounting for 48.56 percent of the total 20.9 million skier visits. There are 22 ski resorts with detachable lift, reached 3.54 million skier visits in 2019, up 20 percent year-on-year.

1.3.6. Ski resorts with more than 100,000 skier visits

Just as Mr. Laurent, who is from Switzerland, has always focused on ski resorts with more than one million skier visits in his "International Report on Snow & Mountain Tourism" over the years, it will have increasingly practical significance to classify and screen ski resorts by the number of skier visits. In 2019, among the 770 ski resorts in China, the top three ski resorts in terms of skier visits are still the "Three WAN"(in Chinese) as dubbed before this report, namely Vanke Songhua lake, Wanda Changbai mountain, and Wanlong ski resorts.

As a pilot study, we only counted the number of ski resorts with more than 100,000 and 150,000 skier visits in the whole year of 2019 as follows.

Table 1-9：Statistics for Ski Resorts with More Than 100,000 skiers （2019）

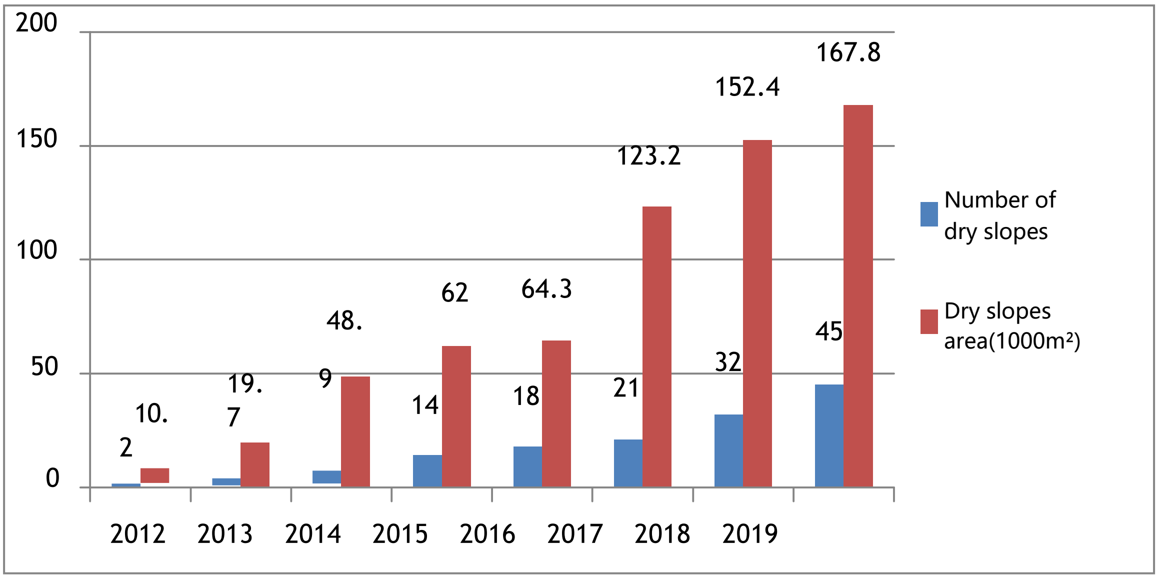
	Number of ski resorts	Skier visits in 2019(10K)	Skier visits in 2018(10K)	Growth rate
≥ 150,000	16	451	349	29%
≥ 100,000	31	609	487	25%
In Total	770	2090	1970	6%

It can be seen that, only 31 of the 770 ski resorts have more than 100,000 skier visits, accounting for 4.03% of the total. But the 31 resorts have received 6.09 million skier visits in total, or 29.14 percent of the total. At the same time, it can be seen from the growth data that the ski resort with more skier visits has a greater year-on-year growth.

1.4. Dry slopes *

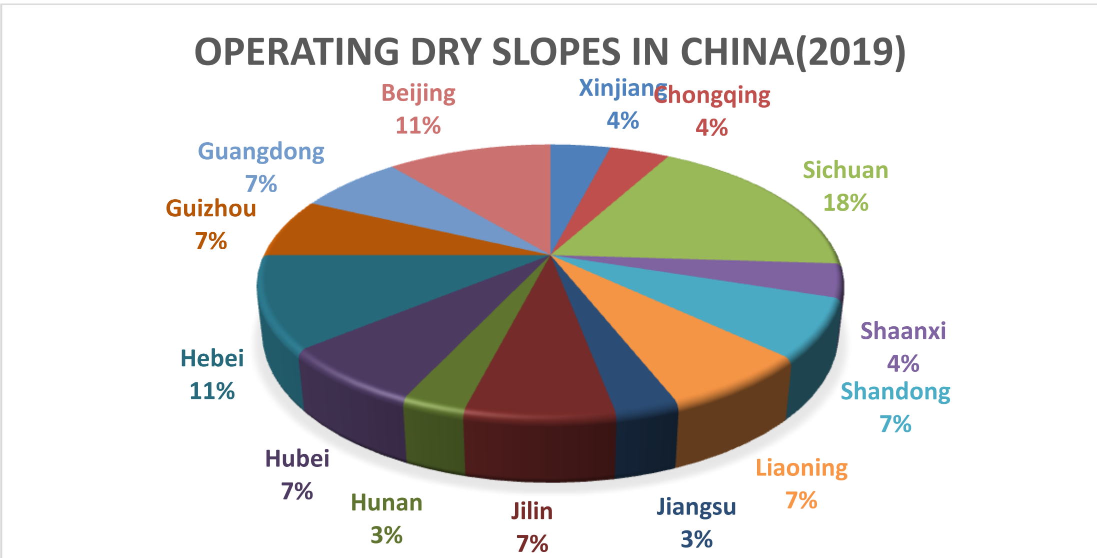
According to the information provided by Jianfeng Dry Snow, by the end of 2019, the total number of artificial snowfields in China has reached 45. But eight of them are closed for extended periods, and one was demolished.

Figure 1-5: Dry Slopes and Area in China



The distribution of dry slopes is shown in Figure 1-6. Currently, Sichuan, Beijing and Hebei are among the top three, accounting for more than 10%.

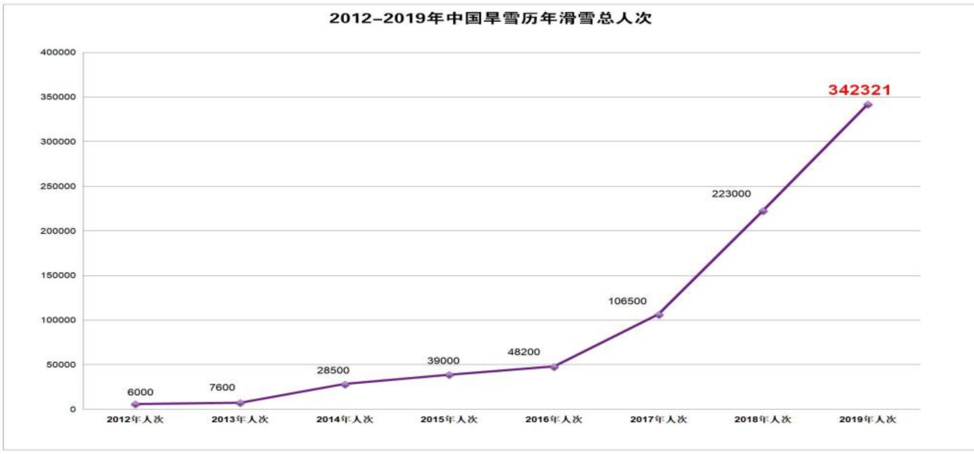
Figure 1-6: Operating Dry Slopes in China



*Note: The inventor and trademark owner (Mr. Dry slope) of the World enoki mushroom Dry Snow (Jian Feng Dry Snow) provided a complete and detailed report of the Dry Slope for this issue of the White Paper. For further needs in the area of dry slopes, please contact Mr. Jianfeng: +86-13281197551

Since the number of snow tubing was included in the dry slopes statistics in 2018, it cannot be used as a reference for comparison. After excluding the data of the snow tubing in 2019, the number of skier visits generated in the dry slopes is 342,300. As what is shown in Figure 1-7.

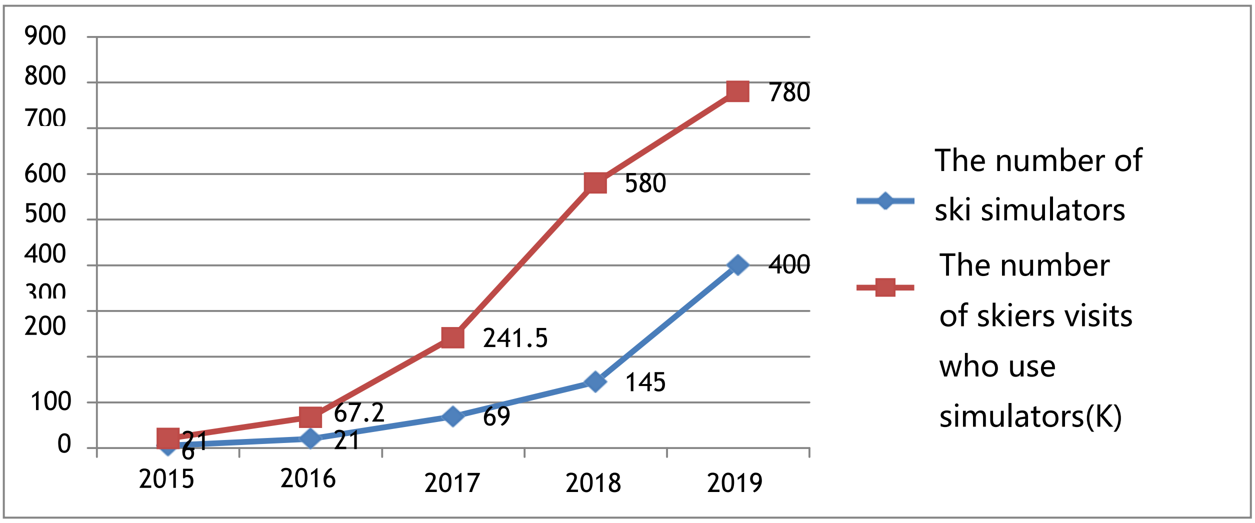
Figure 1-7: Skier Visits of Dry Slopes (2012-2019)



1.5 Ski Simulator

In 2019, the ski simulator market continued to show accelerated growth. According to the information provided by SKINOW (Xueleshan), by the end of 2019, the total number of stores in SKINOW has reached 96. According to the report provided by Winter Wonderland, by the end of 2019, there were 140 domestic ski simulator venues and 400 ski simulators of all kinds in use. It is estimated by this report that the number of skier visits generated by the ski simulators in 2019 was around 780,000, up 34.48 percent from 580,000 in 2018.

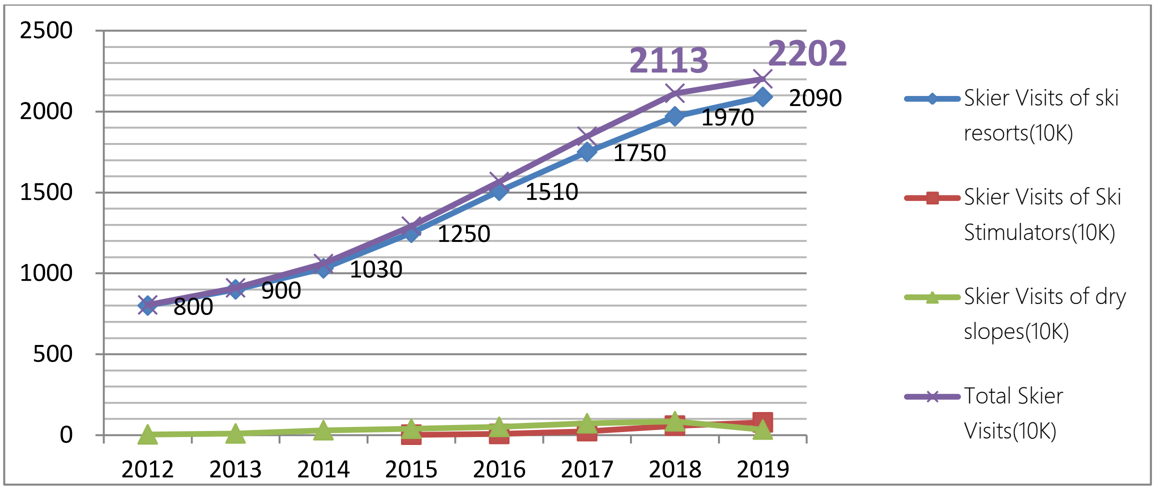
Figure 1-8: Numbers of Ski Simulators and Skier Visits (2019)



1.6 Total Skier Visits

Based on the data from the ski resorts, dry slopes and ski simulators, the total number of skier visits in 2019 was **22.02 million.**

Figure 1-9: Total Skier Visits (Ski resorts/Dry Slopes/ Ski Simulators)



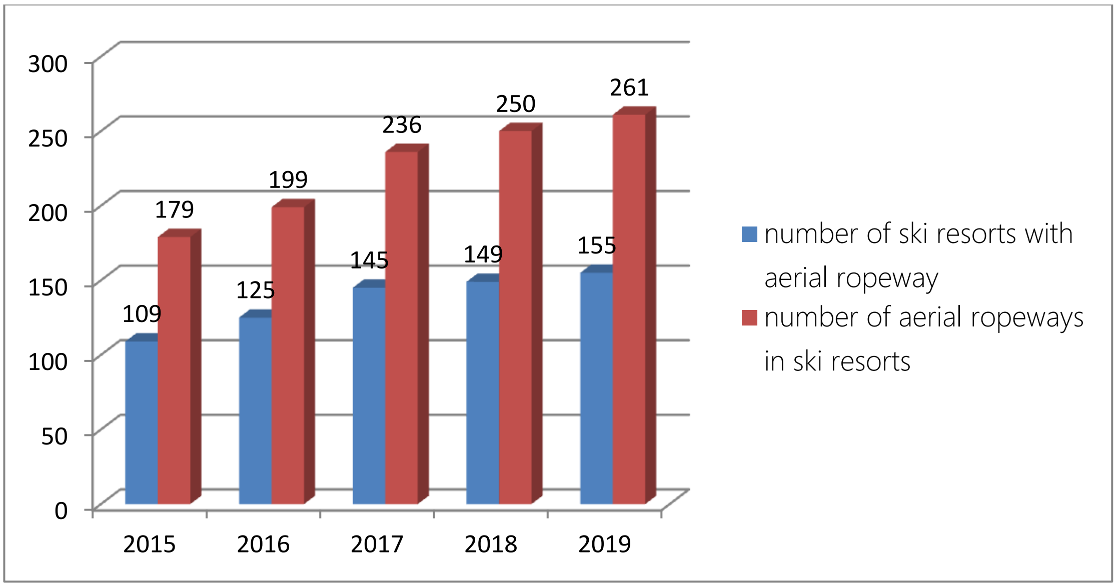
Chapter II Facilities of Ski Resorts

2.1 Ropeway System: Aerial Ropeway & Magic Carpets

Ropeway System determines the operating efficiency of the ski resort, which is the most important part for any ski resort. At present, the domestic Ropeway Systems of ski resorts are mainly aerial lifts and magic carpets. "Whether there is an aerial lift? How many aerial ropeways are there?" Is an important KPI indicator to measure the scale and efficiency of the ski slope.

2.1.1 Aerial Ropeway

Figure 2-1: Aerial Ropeways in Ski Resorts



By the end of 2019, the total number of aerial ropeway built and put into use in domestic ski resorts was 261, distributing in 155 ski resorts in 22 provinces, autonomous regions and municipalities across the country. Among them, Hebei, Heilongjiang, and Jilin ranked top three, with 49, 40, and 39 aerial ropeways respectively. There are 128 aerial ropeways in total have been built in the three provinces, accounting for 49% of the total aerial ropeways in all the ski resorts in China.

Table 2-1: Distribution of Aerial Ropeways in Ski Resorts (2019)

Rank	Province	Number of aerial ropeways	Number of ski resorts with aerial ropeways
1	Hebei	49	22
2	Heilongjiang	40	28
3	Jilin	39	16
4	Liaoning	28	19
5	Beijing	23	13
6	Xinjiang	19	10
7	Inner Mongolia	17	10
8	Shanxi	8	5
9	Gansu	8	7
10	Shandong	6	6
11	Shaanxi	5	4
12	Sichuan	3	2
13	Henan	3	2
14	Yunnan	3	1
15	Chongqing	3	3
16	Guizhou	2	2
17	Hubei	2	2
18	Tianjin	1	1
19	Guangdong	1	1
20	Ningxia	1	1
	In total	261	155

In the ski resorts with the aerial ropeway, the number of the detachable lifts is a concentrated reflection of the size and efficiency. Over the past three years, the domestic detachable lift has developed rapidly, from 26 in 2015 to 60 in 2019, and the number of ski resorts with detachable lifts has increased from 10 to 22.

Figure 2-2: Detachable Lifts in Ski Resorts (2019)

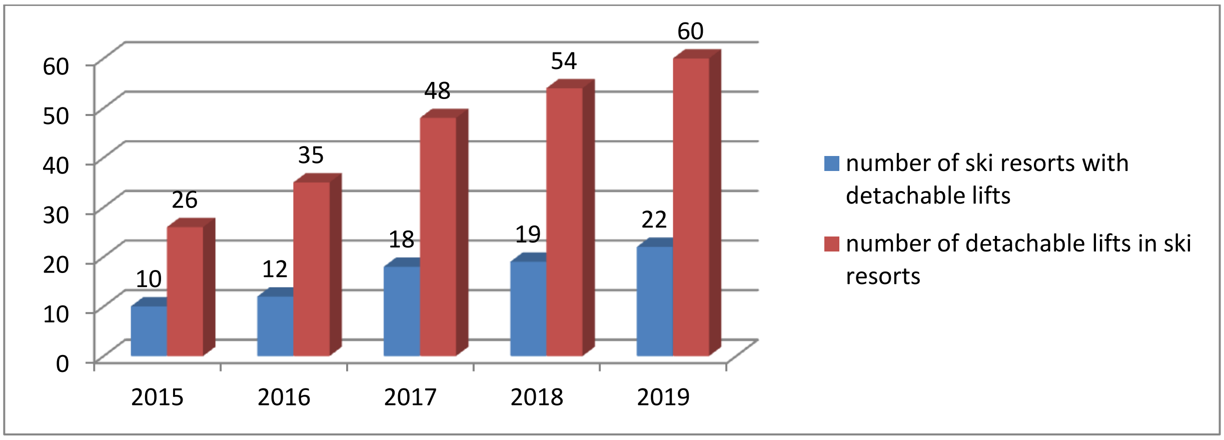
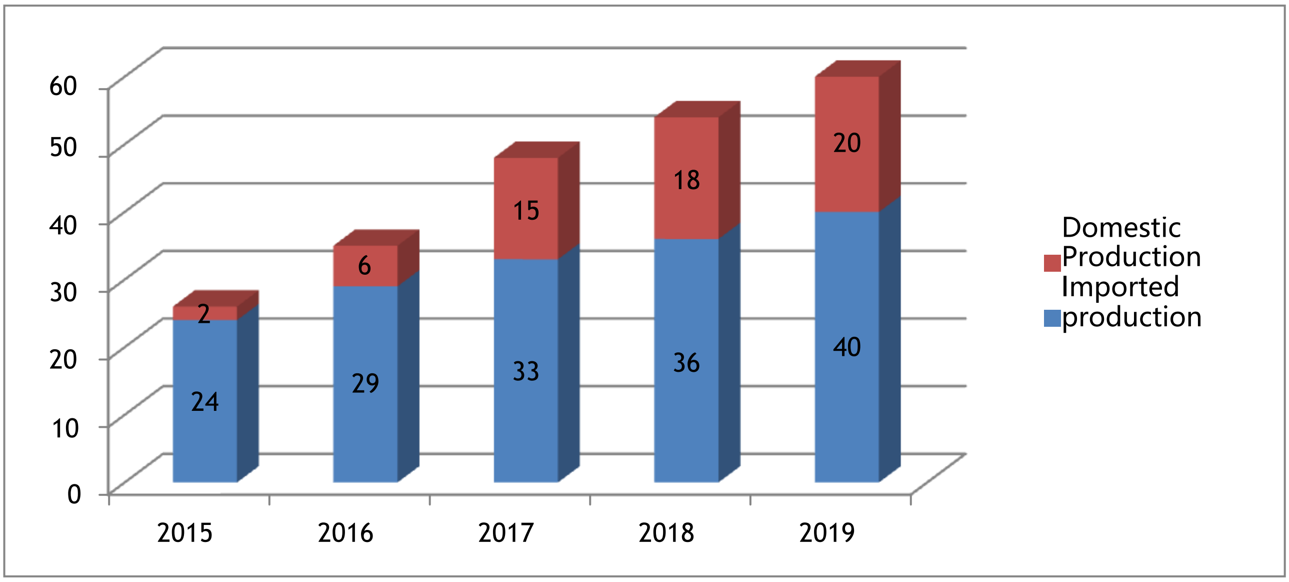


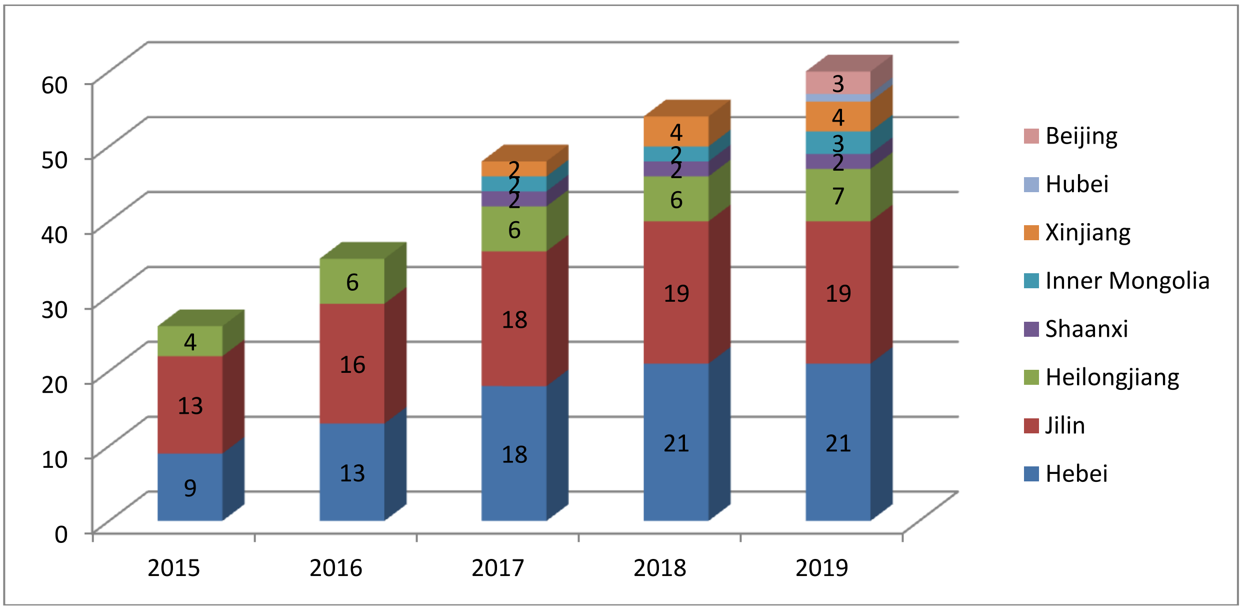
Figure 2-3 summarizes the relationship between imports and domestic production in the detachable lifts over the past four years. The development of domestically produce detachable lift has been rapidly increased from 2 in 2015 to 20 in 2019.

Figure 2-3: Detachable lifts in China by Import and Domestic production (2019)



Among the 60 detachable lifts used in ski resorts, there are 21 in Hebei Province, distributing in 7 ski resorts which are concentrated in Chongli District of Zhangjiakou City; there are 19 in Jilin Province, distributing in 6 ski resorts; there are 7 in Heilongjiang Province, dividedly locating in 3 ski resorts; there are 4 in Xinjiang, distributing in 2 ski resorts; Beijing and Inner Mongolia have 3 detachable lifts respectively; Shaanxi has 2 ski lifts and Hubei has 1 ski lift. (Note: This statistic is for detachable lifts for skiing only, excluding non-skiing usage)

Figure 2-4: Detachable lifts in Ski Resorts in China, by Province (2019)



In 2019, among the ski resorts in China with detachable lift, the National Alpine Ski Center located in Xiaohaituo, Yan Qing, Beijing, deserves the most attention. At the moment, the construction of 3 detachable lifts has been completed, which have been put to use in competition. As the main venue for the Beijing Winter Olympics alpine skiing, the hardware facilities are unparalleled and will inevitably become a Benchmark for domestic ski resorts.

Table 2-2: The Ranking of Ski Resorts According to the Number of Lifts (2019)

Number	Ranking	Ski resorts	2019	Province
1	1	Wanke Songhuahu	6	Jilin
2	1	Wanlong	6	Hebei
3	3	Wanda Changbai Mountain	5	Jilin
4	3	Taiwu	5	Hebei
5	5	Beidahu	4	Jilin
6	5	Funding	4	Hebei
7	5	Yabuli(high mountain)	4	Heilongjiang
8	8	National Alpine Ski Center (Yanqing Xiaohaituo)	3	Beijing
9	8	Silkroad	3	Xinjiang
10	8	Fulong	3	Hebei
11	11	TaibaiAo Mountain	2	Shaanxi
12	11	Luneng Shanghai Mountain	2	Jilin
13	11	Cuiyun Mountain Galaxy	2	Hebei
14	11	Yabuli (Sunlight)	2	Heilongjiang
15	11	Liangcheng Daihai	2	Inner Mongolia
16	16	Miaoxiang Mountain	1	Jilin
17	16	Duole Meidi	1	Hebei
18	16	Maoer Mountain	1	Heilongjian g
19	16	Changchun Lianhuashan	1	Jilin
20	16	Jiangjunshan	1	Xinjiang
21	16	Meilingu	1	Inner Mongolia
22	16	Lvcongpo	1	Hubei
		Total	60	

2.1.2 Magic Carpets in Ski Resorts

Magic carpets play a vital role in the development of the Chinese Skiing market, also the world’s biggest beginner skiing market. In the past two years, the amount of newly established outdoor ski resorts has fallen, following by the withering of the magic carpet market. There are 21 thousand meters of new magic carpets in 2019, which is slightly higher than 2018.

Figure 2-5: The Number & Length of New Magic Carpets in Ski Resorts (2019)

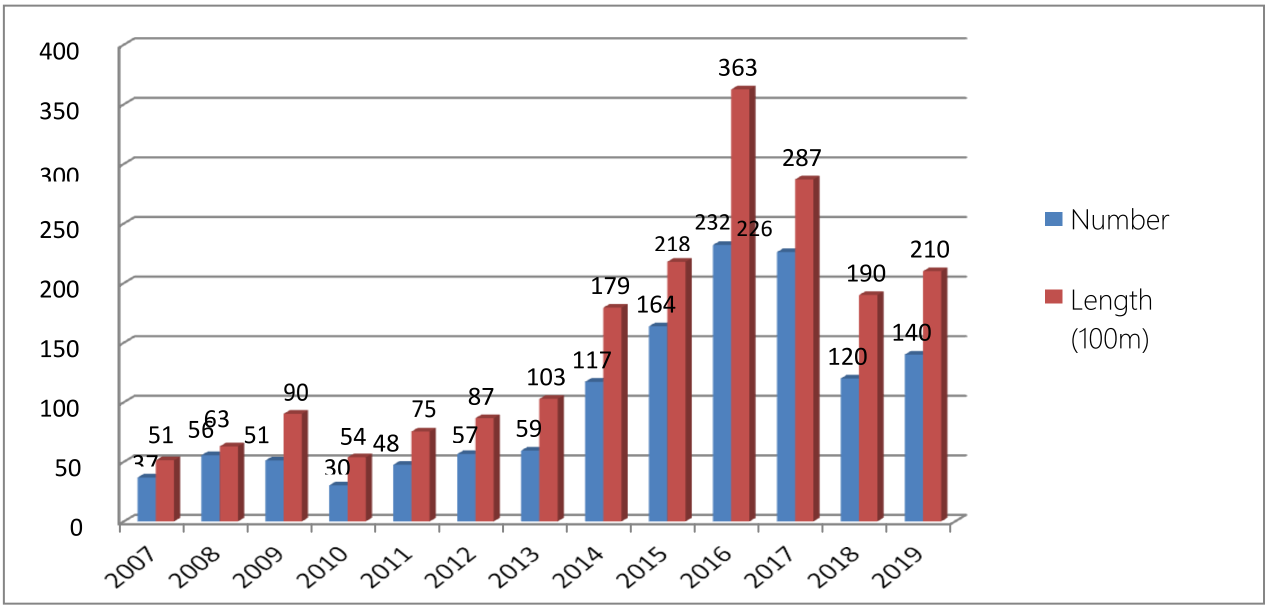
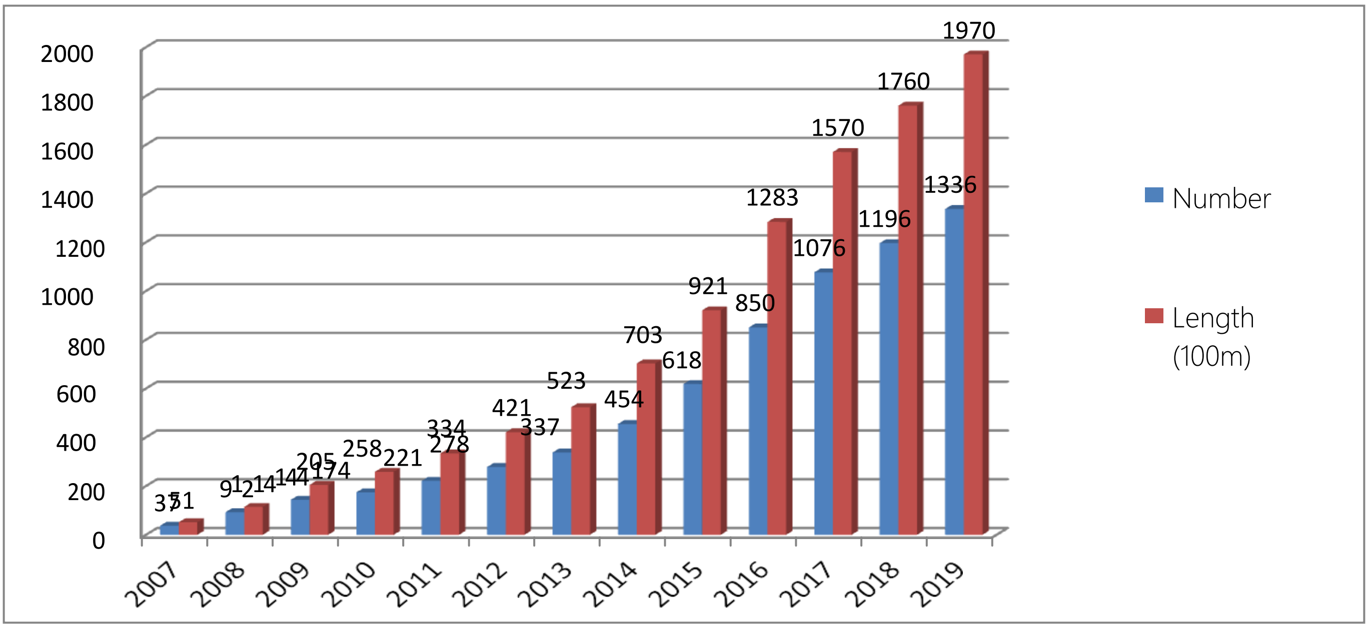


Figure 2-6: The Number &Length of Magic Carpets in Total (2019)



Data from major magic carpet suppliers in China. As of 2019, there are 1,336 Magic carpets in operation in domestic ski resorts, including 140 new in 2019. The total length of all magic carpets is about 197 kilometers.

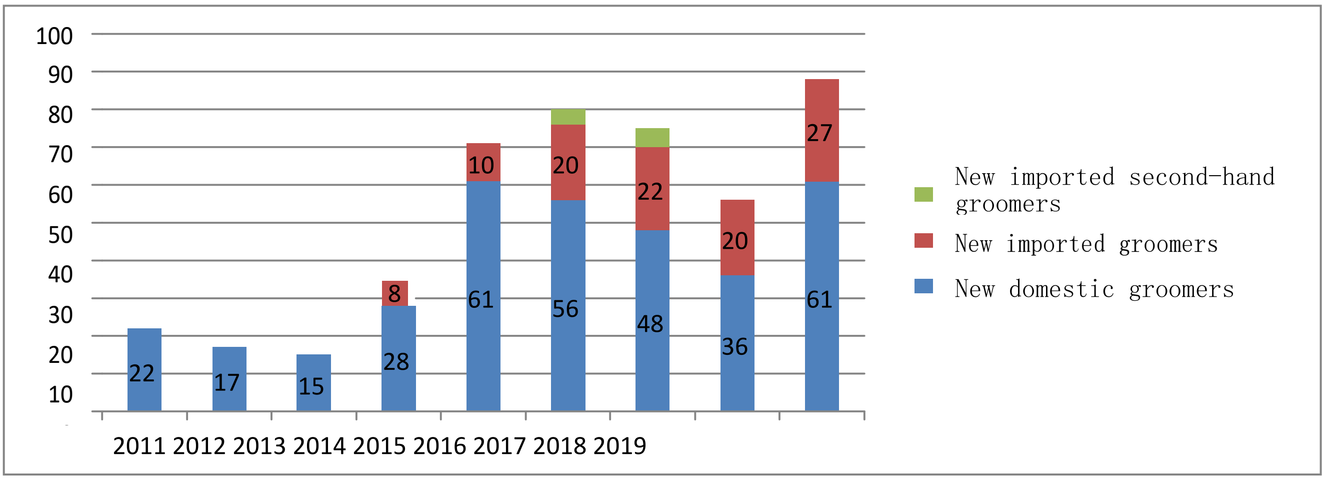
2.2 Groomer & Snowmaker

Due to large orders from the Beijing Winter Olympic, the sale of groomers and snowmakers has an apparent increase in 2019. Also, the recent climate changes have caused great troubles in the snow-making process and slope-maintenances. As a result, the managers have to purchase new snowmakers and improve existing snow-pressing equipment.

2.2.1 Groomer

According to statistics, there are about 629 groomers in all domestic ski resorts in China. In 2019, there are 88 new groomers in China, with 19 groomers from Beijing Yanqing Winter Olympics National Alpine Ski Center. This number is much higher than that in 2018 (56). There are about 61 newly imported groomers and 27 domestic groomers. Data from major groomer production companies.

Figure 2-7: New Groomers in Ski Resorts (2019)



Beijing Longzhixun Information Consulting Co., Ltd. provide this white paper the data of China Customs, which is a reliable help when investigating the domestic market.

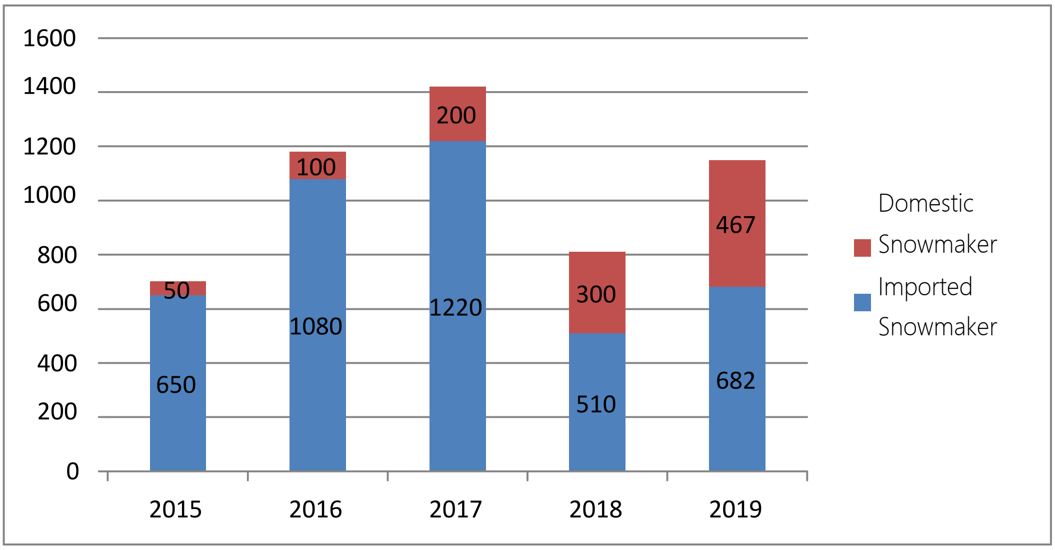
Table 2-3: Imported Groomers by China

Importing Country	2013	2014	2015	2016	2017	2018	2019	In Total
World	23	31	68	68	60	58	63	**371**
Italy	10	18	28	28	24	33	39	**180**
Germany	6	7	16	20	27	23	20	**119**
Russia	0	0	0	1	0	0	1	2
America	2	1	4	7	2	0	2	18
China	0	0	0	0	0	1	0	1
Japan	2	0	7	1	1	1	0	12
Finland	1	1	0	0	-	-	-	2
Austria	0	0	1	0	-	-	-	1

Quote: China Customs, Beijing Longzhixun Information Consulting Co., Ltd.

2.2.2 Snowmaker

Figure 2-8: The Number of New Snowmakers in Ski Resorts (2019)



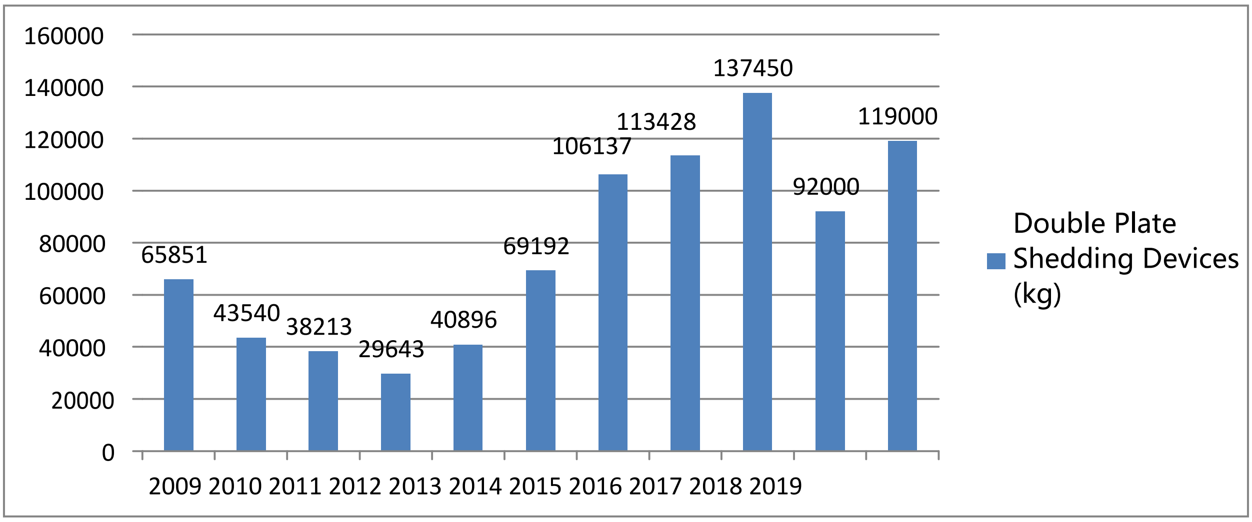
There are about 1149 new snowmakers in all domestic ski resorts (including Beijing Winter Olympus Stadiums) in 2019, showing a 41.85% increase compared with that in 2018. As of the end of 2019, there are about 8,559 snowmakers in total. Data from major snowmaker suppliers.

2.3 Rental Equipment in Ski Resorts: Rental Ski.

China doesn't have local ski binding product, so we use data on imported ski bindings to analyze the skis market. Also, the rental market of skis is much larger than that retailing, showing a high relevance with the scale of imported ski bindings.

Based on the data provided by China Custom, it is found that after a sharp fall in 2018, the number of imported ski bindings has risen rapidly with a year-on-year increase of 29.35% (from 92 ton to 119 ton); however, this number is still relatively low compared with that in 2017 (137.45 ton).

Figure 2-9: China Import on ski bindings



Quote: Beijing Longzhixun Information Consulting Co., Ltd.

It is a pity that as of the end of compiling, relevant data from the industry could not be obtained in time to estimate the performance of the rental skis market in 2019; however, from what we have observed in previous years, the rapid increase on the imported ski bindings is a sign showing the prosperity rental skis market.

Chapter III Characteristics of Skiers

Who are the skiers? Where are they from and where are they heading for? These are the questions we want to answer when analyzing the characteristics of skiers. In order to write this report, in addition to large quantities of surveys we have made by our team, different online platforms like Ctrip Travel, Mafengwo Ski, iSNOW/HIGHSNOW, Ski+, have also submitted reports on the whole look of the characteristics of the skiers. Maybe each single report doesn't tell you a clear idea, but there are interesting points come out after we collected and compared all the data. We hope you can see a preliminary picture of the skiers from the report.

3.1. The Gender of Skiers

Table 3-1: Gender Distribution of Skiers

	Destination Ski Resorts	Day-trip Ski Resorts	iSNOW	SKI+	Mafengwo Ski	Ski simulator (SKINOW)	Indoor ski resorts (Sunac Snow World)
Male	57.70%	52.80%	58%	68%	32%	55%	44.37%
Notes	Calculation based on the number of person visits at each ski resort		Online Users	On-line Users	Online Users	Customers Arrived	Skiing School Students

Through comparison, we have found that:

1. The gender distribution of day-trip ski resorts is more balanced than destination ski resorts.
2. The majority of ski enthusiasts are male (from the report of iSNOW and SKI+).
3. Two-thirds of users in Mafengwo Ski is female.
4. The elementary indoor ski market has more female learners than males.

3.2 The Age of Skiers

Figure 3-2: Age of Skiers

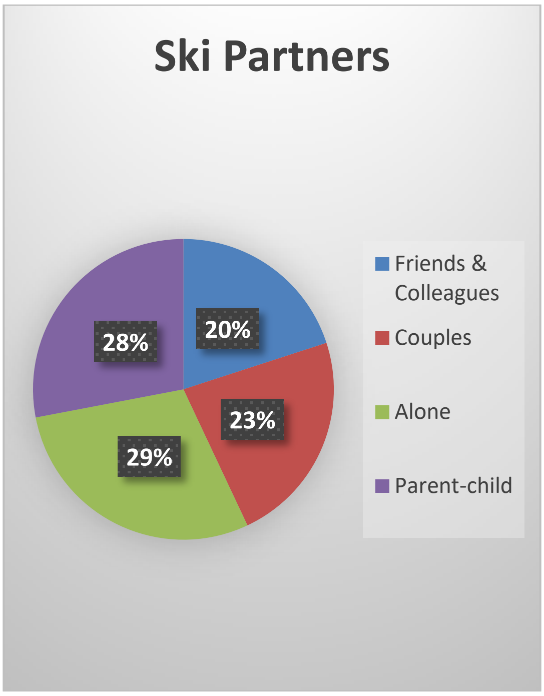
Age (year)	Destination Ski Resorts	Day-trip Ski Resorts	iSNOW	SKINOW	Ctrip
1-7	3.74%	4.21%		15%	
7-20	10.74%	17.06%	6%	19%	22%
20-30	27.69%	34.59%	51%	26%	25%
30-40	33.66%	28.19%	39%	35%	30%
40-50	18.38%	12.02%	3%	4%	15%
Above 50	5.79%	3.93%	1%	1%	8%

From a comparison of the above data, we found:

1. The average age of skiers who go to destination ski resorts is higher than those who go to day-trip ski resorts.
2. Skiers under 40 take up a proportion of 95% in SKINOW (mainly primarily provides ski teaching services).
3. 96% of skiers in iSNOW (mainly provide online services) is under 40.

3.3 Other Characteristics

3.3.1 Ctrip Report (extract)



Among all skiers, those who travel alone occupy the largest proportion (29.3%), followed by family travel and couple travel (respectively 27.5% and 22.8%). Those who travel with their friends or colleagues take up 20.4%. It is found that the youngest skier that travels with parents is only 2.5 years old. In these years, there are growing numbers of tourists go skiing with their family, which shows that skiing becomes a popular activity among parent-child travel.

2020 Top 10 Cities of Ski Lovers	
1	Shanghai
2	Chengdu
3	Beijing
4	Guangzhou
5	Wuhan
6	Hangzhou
7	Suzhou
8	Nanjing
9	Fuzhou
10	Shenzhen

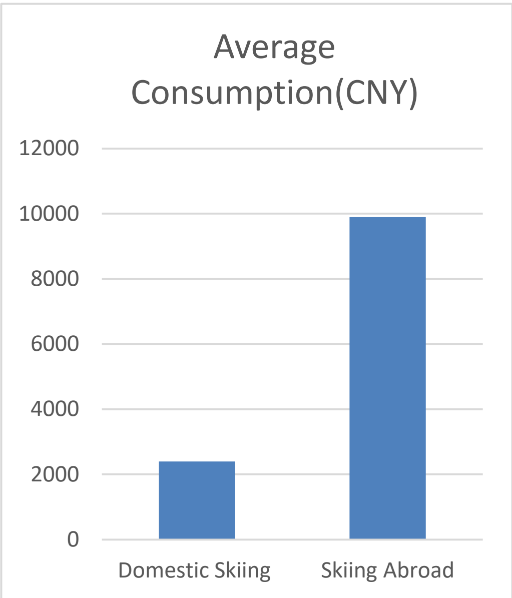
Data from Ctrip

Where are they from?

From what has been analyzed by Ctrip, people from Shanghai have a strong passion on skiing, followed by those from Chengdu, Beijing, Guangzhou, Wuhan, Hangzhou, Suzhou, Nanjing, Fuzhou and Shenzhen.

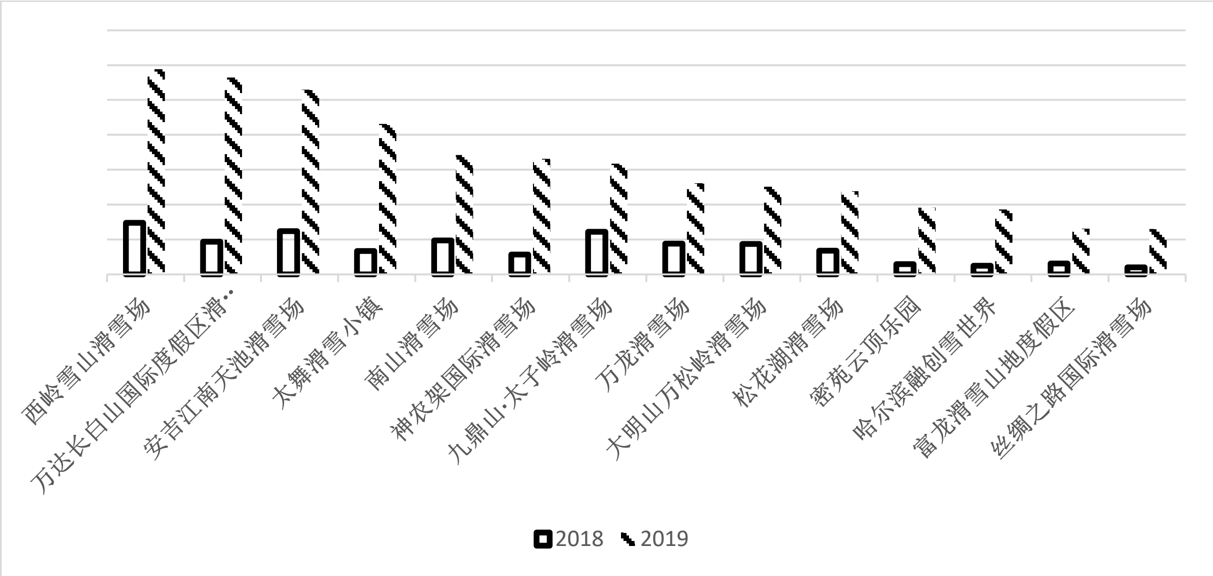
How much will a skiing trip cost?

According to Ctrip, domestic average consumption on skiing is 2398 CNY, while average consumption on skiing abroad is 9893 CNY.



2020 Top 10 Skiing Destination Cities	
1	Bai Mount
2	Jilin City
3	Mao County
4	Harbin
5	Zhangjiakou
6	Beijing
7	Changbai
8	Urumqi
9	Wuhan
10	Shennongjia

3.3.2 Mafengwo.com Ski Report (extract)

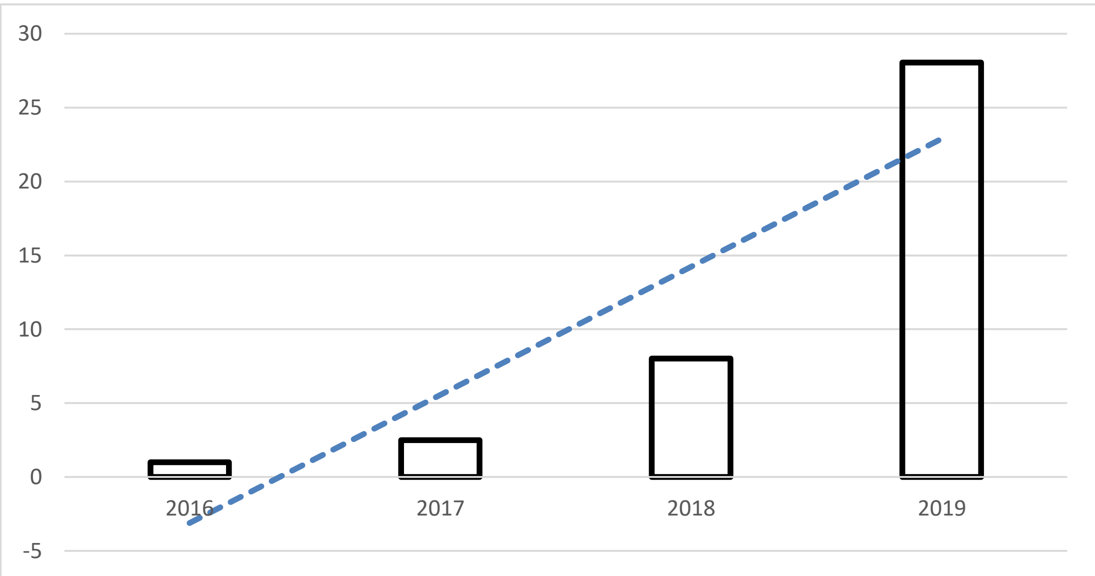


Data from Mafengwo.com

Top Ski Resorts in China

(List from left to right: Sichuan Xiling, Jilin Wanda Changbaishan, Zhejiang Anji Jiangnantianchi, Chongli Thaiwoo, Beijing Nanshan, Hubei Shenglongjia, Sichuan Taizilin, Chongli Wanlong, Zhejiang Daminshan, Jilin Songhua Lake,Chongli Genting, Heilongjiang Harbin Sunac, Chongli Fulong, Xinjiang Silkroad)

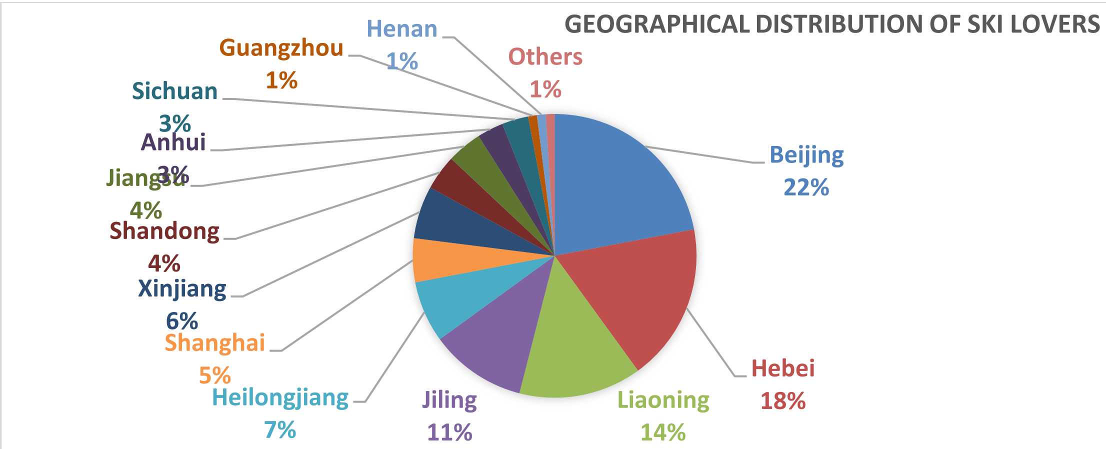
With a growing user groups, skiing experiences shared by users in Mafengwo.com have an increase by 349.89%, which is the 1120.64% of that in 2017.

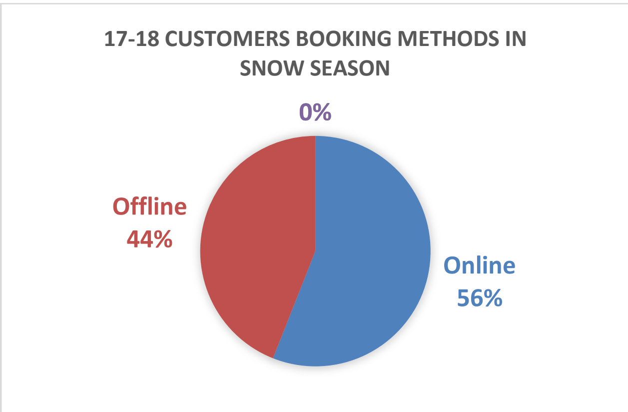


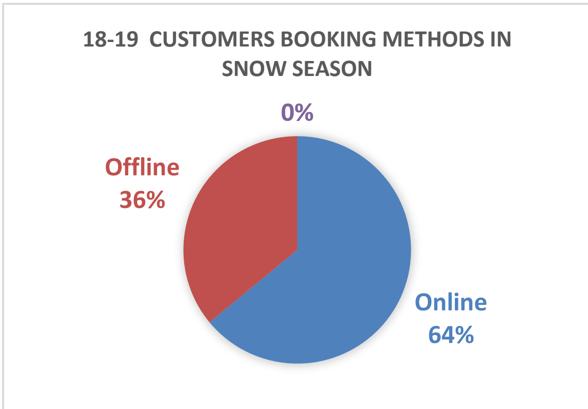
Number of Notes about Skiing Experiences

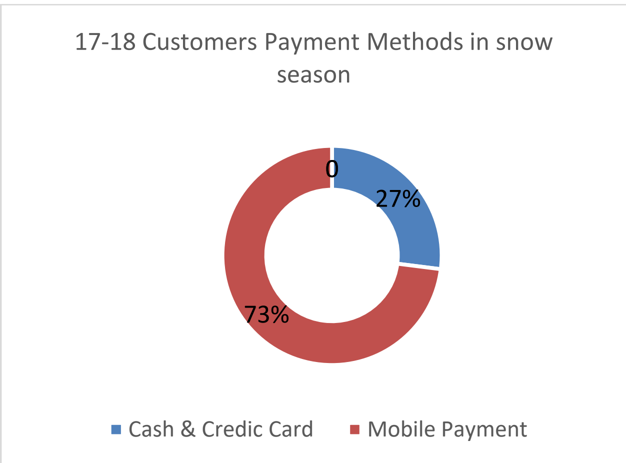
3.3.3 iSNOW report (extract)

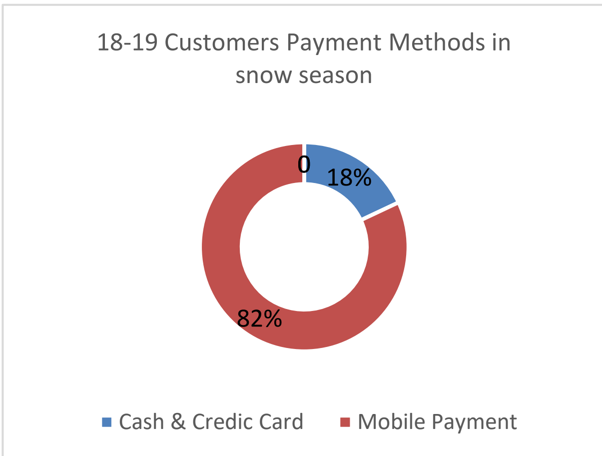
It is shown by iSNOW that ski enthusiasts come from places all over China, while most of them are from Beijing, Hebei province and three northeastern provinces. According to the data of 2018-2019, online transactions grow rapidly, at the same time, mobile payment occupies a proportion of 82%.





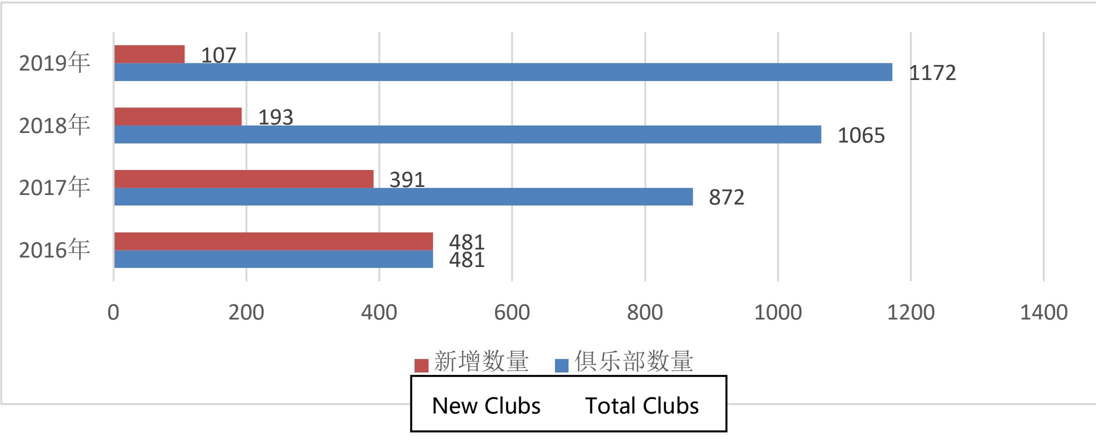




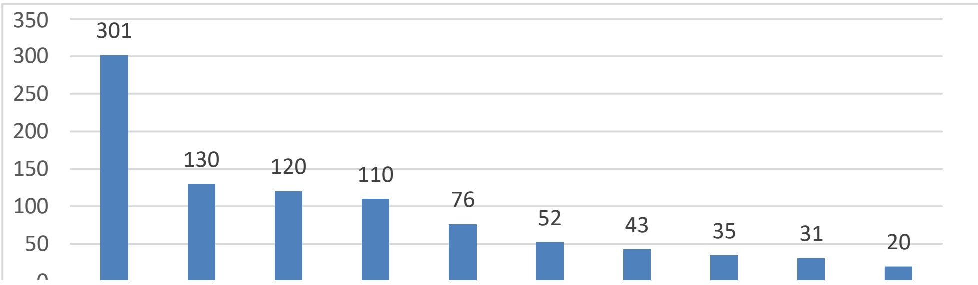


3.3.4 SKI+ (extract)

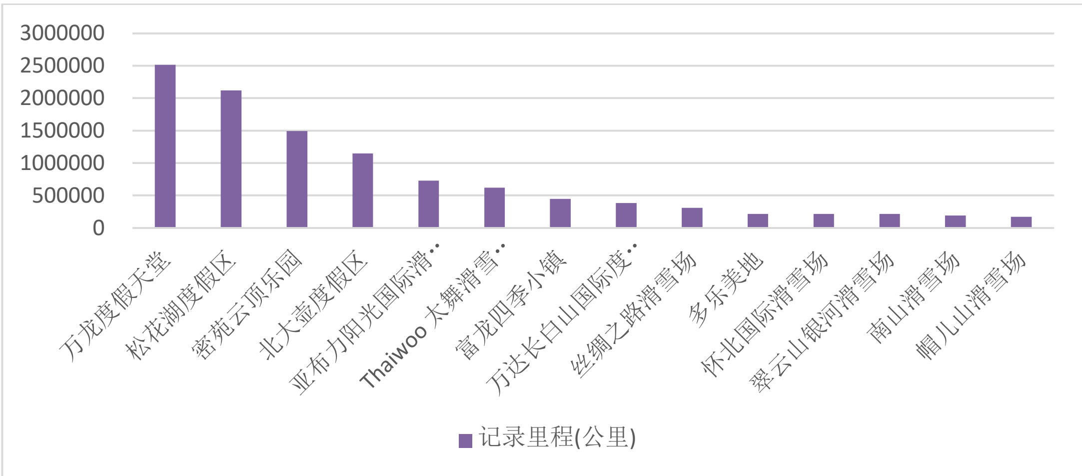
As of 2019, there are over 1172 clubs registered in Fenxuekeji (Huabei), covering 126 cities and 29 regions (including 20 provinces, 4 municipalities, 4 autonomous regions and 13 in overseas.



Skiing Clubs in SKI+



Top10 in number of regional clubs



The number of TOP15 snow resorts according to Fenxuekeji

(List from left to right: Chongli Wanlong, Jilin Songhua Lake, Chongli Genting, Jilin Beidahu, Heilongjiang Yabuli, Chongli Thaiwoo, Chongli Fulong, Jilin Wanda Changbaishan, Xinjiang Silkroad, Chongli Dolomiti, Beijing Huaibei, Chongli Cuiyunshan, Beijing Nanshan, Heilongjiang Moershan)

Chapter IV Ski Gear & Ski Equipment Market

The 2018 White paper of the ski industry wrote that the ski equipment market finally had a sign of recovering after several years of uncertainty. There has been more positive news for the ski equipment market in 2019. Even though we still fail to have a systematic report on the equipment market, at least we have some credible data.

Generally, the Snowboard market has entered a period of rapid growth, and the overall annual growth rate is expected to be between 25% and 30%. At the same time, there are also signs of recovery and the start-up of the double plate market. This chapter is mainly based on the information Shared by French Decathlon Wed'ze ski and GOSKI of Cold Mountain

4.1 Report of Decathlon Wed'ze ski on the Chinese market

(1) In 2019, Decathlon Wed'ze ski hit shelves of 315 Decathlon stores in China. The top three cities with the highest number of stores are Shanghai, Beijing and Guangzhou, and the top three cities of Wed'ze skiing brand sales were Beijing, Shanghai and Chengdu for five consecutive years. Wed'ze ski brand has achieved continuous growth for five consecutive years in China.

(2) In terms of the sales of different categories of Wed'ze skiing brands, the volume of the snowboards is much higher than that of skis, and the growth rate of ski equipment for children's is higher than that for adults. Among them, in 2019, the year-on-year growth rate of children's snowboard and snowboard shoes was around 40%.

(3) The sales of Wed'ze ski suits are the most outstanding. In 2019, the sales volume of adult and children suits series had exceeded 1.5 million pieces.

(4) The sales of Wed'ze ski helmets and wind goggles continued to grow rapidly in the past five years, in 2019, the annual sales volume of adult series and children series both achieved a growth rate of more than 100% compared with 2015.

4.2 The Report of Cold Mountain GOSKI

(1) In 2019, 27 stores were opened by Cold Mountain. Sales volume was 75 million in 17/18 snow season, and the sale volume of 18/19 snow-season increased to 90 million, with an annual growth rate of 20%. And the per customer transaction is 2000 CNY.

(2) The sales volume of the equipment for men and the equipment for women account for 65% and 35% respectively .

(3) Distribution of sales: Beijing and Chongli make up 40% of the total sales, the three northeast provinces of china took up 30%, and the Yangtze River Delta region accounted for 5%.

(4) In China, the sales volume of Oakley, a well-known eyewear brand, increases by more than 10,000 every year, and the sales volume in the recent three snow seasons is 10,000, 20,000 and 30,000 respectively. It is expected to reach 60,000 by the 22/23 snow season.

(5) In China, the retail sales of Burton, a top snowboard brand, were 100 million yuan in the 18/19 snow season and 120 million yuan in the 19/20 snow season. Growth is expected to be between 30 to 50 percent a year for the next few years.

(6) Core Market Estimate: The market share of Cold Mountain takes up about 10-15% of the total core market, with an estimated market size of between 600 to 900 million. (Core market refers to professional brand market)

(7) In the next three years, with estimated annual growth rate of 30%, the 19/20 snow season will be 1 billion, the 20/21 snow season will achieve 1.3 billion, and the 21/22 snow season will reach 1.56 billion

(8) According to the report of the SIA industry in the United States, the snowboard retail industry in the American ski market is about 800 million to 1 billion dollars, with the snowboard population of about 7.6 million, and the sales volume of the snowboard is about 450,000 to 500,000 pieces. So far, China accounts for about 10 % of the American market.

Chapter V Summary (Core Data of White Paper from 2015 to 2019)

Concluding the data in five White Paper, we have Table 5-1, and the conclusion remains unchanged: China is the world's largest primary ski market.

At the same time, we need to set great store by the following two points:

(1) Although the overall ski market is on the course of continuous growth, the growth rate of the core data has been declining substantially over the past five years, on both the supply side and the demand side.

(2) It is easy to conclude from the statistical analysis of the classification of ski resorts in the first chapter of this report that the ski market in China has begun to differentiate, showing a significant Matthew effect.

Table5-1：Summary of The Core Data of the White Paper (2015-2019)

Core data	15-19 Cumulative growth	2019	2019 Increasing Rage	2018	2018 Increasing Rage	2017	2017 Increasing Rage	2016	2016 Increasing Rage	2015
The number of ski resorts	**35.56%**	770	3.77%	742	5.55%	703	8.82%	646	13.73%	568
The number of ski resorts with aerial ropeway	**27.05%**	**155**	4.03%	**149**	2.76%	145	5.84%	137	12.30%	122
Number of indoor ski resorts (artificial snow)	**244.44%**	**31**	19.23%	**26**	23.81%	21	75.00%	12	33.33%	9
Skier Visits of ski resort （10K）	**67.20%**	**2090**	6.09%	**1970**	12.57%	1750	15.89%	1510	20.80%	1250
Total Skier Visits (10K)	**70.57%**	**2202**	4.21%	**2113**	14.40%	1847	17.87%	1567	21.38%	1291
The number of aerial ropeways	**32.32%**	262	4.80%	250	5.93%	236	4.42%	226	14.14%	198
The number of detachable lifts	**134.62%**	61	12.96%	54	12.50%	48	33.33%	36	38.46%	26
The number of magic carpets	**116.18%**	1336	11.71%	1196	11.15%	1076	26.59%	850	37.54%	618
The number of snowmakers(snow guns)	**113.98%**	8559	15.51%	7410	12.27%	6600	27.41%	5180	29.50%	4000
The number of groomers	**90.61%**	629	16.27%	541	11.55%	485	18.29%	410	24.24%	330

Chapter VI Year 2020 under the Coronavirus Disease (Estimated Loss)

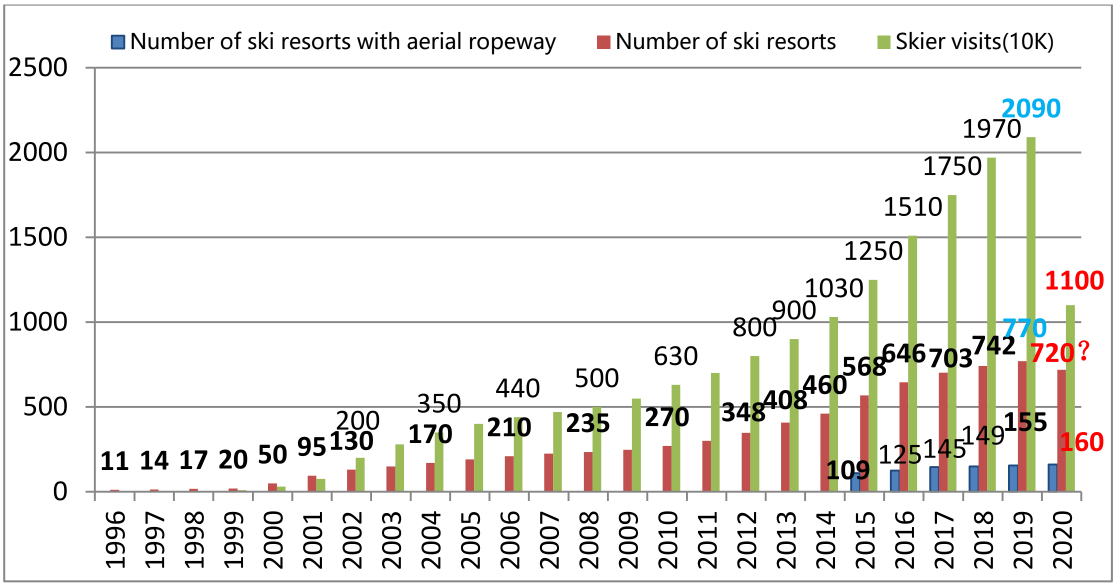
Due to the outbreak of the epidemic, the domestic ski resorts all have to suspend business during the Spring Festival. Given the country's epidemic prevention and control situation is still grim, the preliminary judgment is that the domestic 19/20 snow season has basically come to an end, 99.9% of the outdoor ski resorts can resume business when the next snow season comes, while when the indoor ski resorts will reopen still depends on the epidemic situation and government’s policy. According to the rules of this industry, the number of people who visit during Spring Festival, February and March will account for 40-50% of the whole snow season. Meanwhile, due to the weather, a large number of outdoor ski resorts can only open in the middle and late December. So, it is a reality that the industry has suffered a heavy loss by 2020.

1. The number of skier visits in 2020 will decrease to around 11 million, and the year-on-year decline is 47.37%

2.Under the impact of high-temperature weather and the epidemic, a group of outdoor ski resorts, which locate in a critical temperature zone, may fail to have the conditions to operate throughout 2020. The total number of open ski resorts in 2020 is expected to decline to about 720.

3. According to the data currently available, it is estimated that 5 new ski resorts build aerial ropeways, which are expected to be accomplished in 2020. Meanwhile, 4 new indoor ski resorts are expected to open.

Figure 6-1: Forecast of the Number of Ski Resorts and Skier Visits in China(2020)



Note: the number of ski resorts and skier visits includes outdoor ski resorts and indoor ski resorts but excludes dry slopes, and ski simulated gymnasiums., etc.

4. According to the analysis method adopted in the White Book, a conservative calculation based on the growth rate of skier visits in various ski resorts in 2019 shows that the short-term loss caused by the epidemic to domestic ski resorts is about 6.68 billion CNY, while the overall short-term economic loss is estimated to exceed 8 billion CNY, taking into account other contingent losses. The specific calculation basis is shown in the table below.

Table 6-1: The Estimated Short-term Economic Loss Caused by the Epidemic to Domestic Ski Resorts

	Number of ski resorts	Skier visits in 2019 (10K)	Expected growth in 2020	Loss of skier visits caused by epidemic (10K)	Per capita consumption (CNY)	Direct Short-term economic loss(10k CNY)	Other loss for one ski resort(10k CNY)	Total other loss (10k CNY)	Overall short-term economic loss(10k CNY)
Large Destination Ski Resort	8	256	30%	166	1,500	249,600	1,000	8,000	257,600
Medium Destination Ski resort	12	68	25%	43	1,000	42,500	500	6,000	48,500
A suburban ski resort with aerial ropeways	135	691	15%	397	500	198,663	300	40,500	239,163
Other snow resorts	615	1,075	10%	591	300	177,375	150	92,250	269,625
In total	770	2,090		1,197		**668,138**		146,750	**814,888**

Appendix：Index

Introduction to the Author

Wu Bin (Benny Wu)

Benny WU (Wu Bin), Writer of ‘*the China Ski Industry White Book*’， chief writer of ‘*Blue Book of Ice and Snow Sports*’， vice chairman of Beijing Ski Association, Ice and Snow Sports Consultant of Beijing Shijingshan District, distinguished expert lecturer of Beijing sport university, visiting professor of Beihua University. Benny Wu devoted to promoting the development of China ski industry over a long-term with a deep research on international and domestic ski industry.

Benny WU has successively served as CEO of Beijing Carving Ski Group, Chief Strategy Officer of Ice & Snow Business Department of Vanke Group, deputy general manager of Golf-Ice-Snow Department of Beijing Wanda Cultural Industry Group, general manager of Jilin Beidahu Ski Resort, general manager of Chongli Dolomiti Ski Resort, marketing director of Italy Tecnica Group China, executive director of Beijing Snowfavor Sports Co., Ltd., etc..

Introduction to the Translator

JIXIANBANG.COM

- JIXIANBANG.COM, which integrates e-commerce shopping guide, sports software toolbox, media, and community, is an outdoor sports technology brand based on the global market.
- The main business of the company is the outdoor sports industry platform (www.jixianbang.com) and the corresponding mobile client.
- The core technology of the company involves software development, big data, machine learning, etc.
- Provides information promotion services for outdoor sports e-commerce and brand owners.
- Provides sports data services for outdoor sports players.