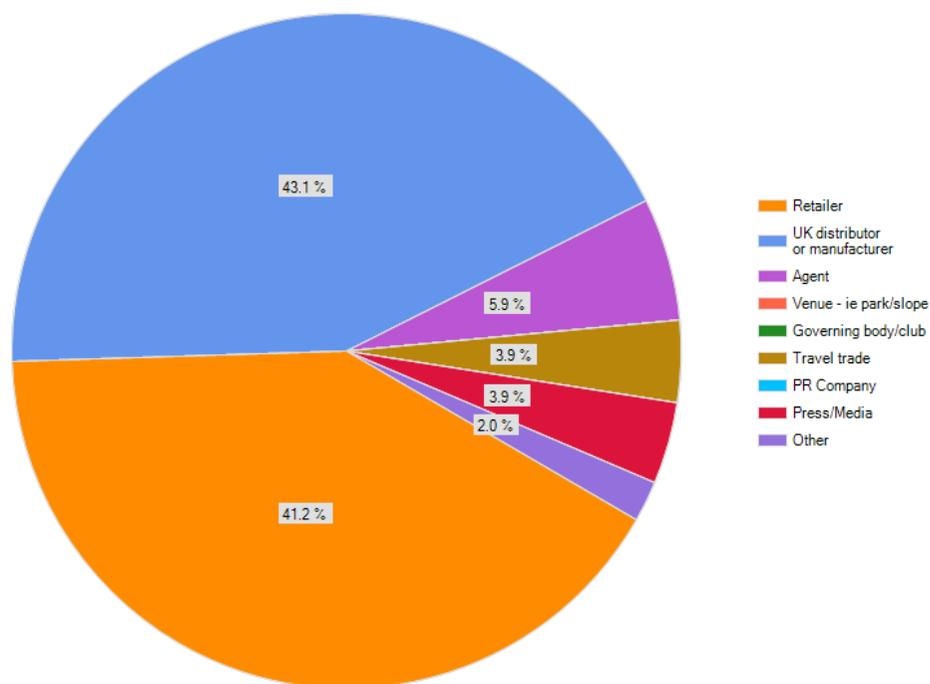




### SIGB Web Survey, December 2013

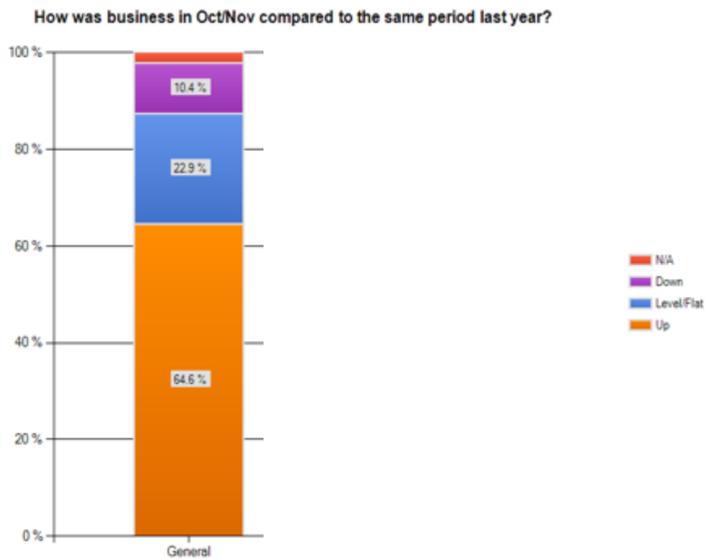
An on-line survey in place from 12-20 December, for members of the Snowsport Trade to respond to. It was distributed to over 2,600 email addresses via an SIGB Email newsletter and direct to specialist retailers. A total of 41 responses were received, 21% of which were from retailers.

Which is the closest to your company's main activity?

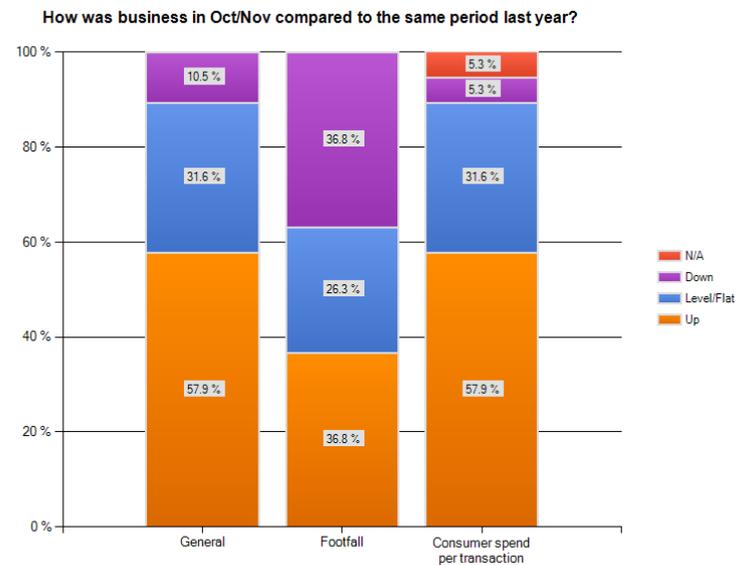




### All Respondents

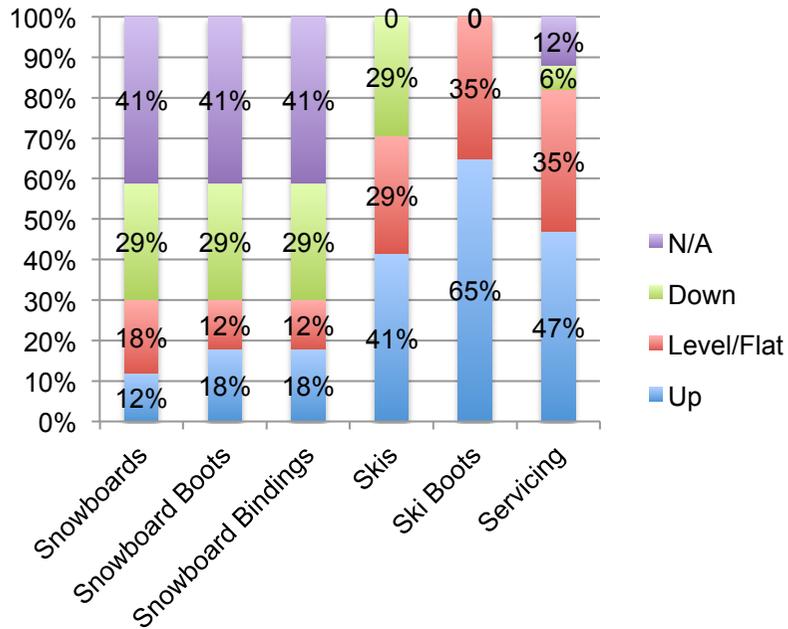


### Retailer Respondents

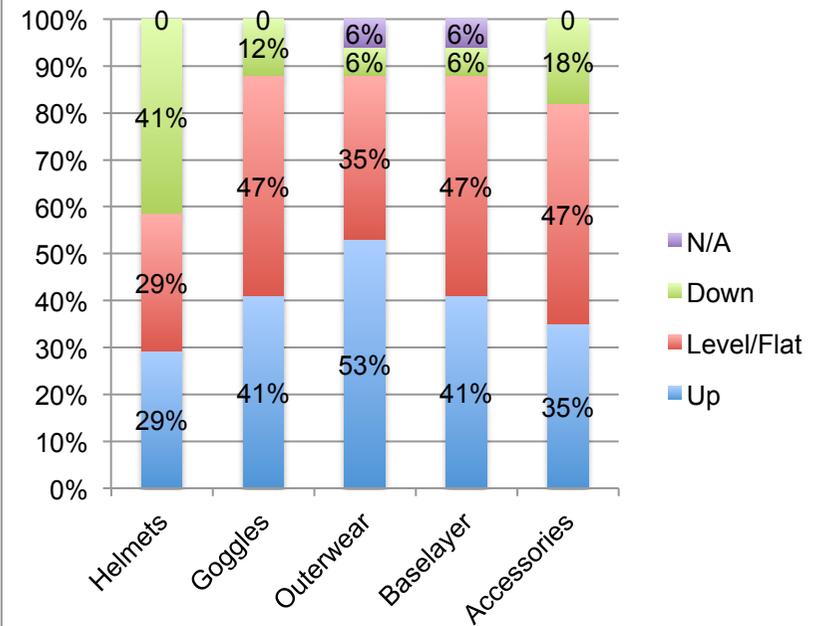




**Retailer Respondents  
Hardware**  
How have the last 2 months (Oct/Nov)  
compared to the same period last year?



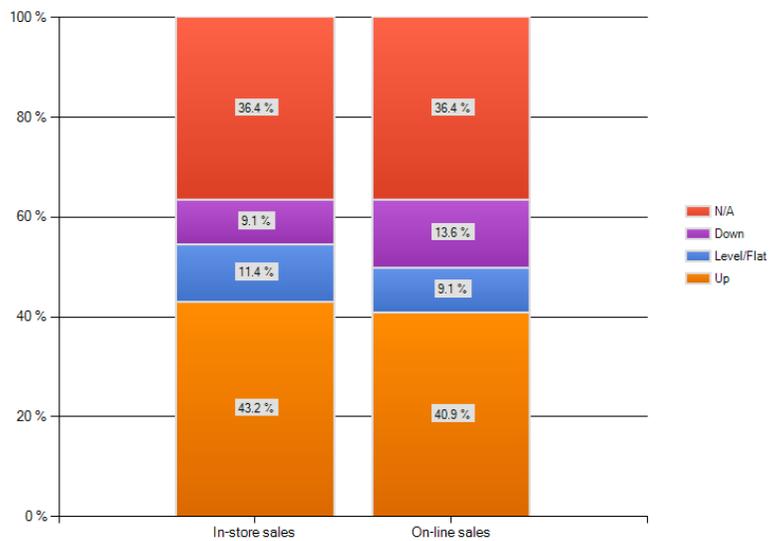
**Retailer Respondents  
Apparel, Accessories**  
How have the last 2 months (Oct/Nov)  
compared to the same period last year?





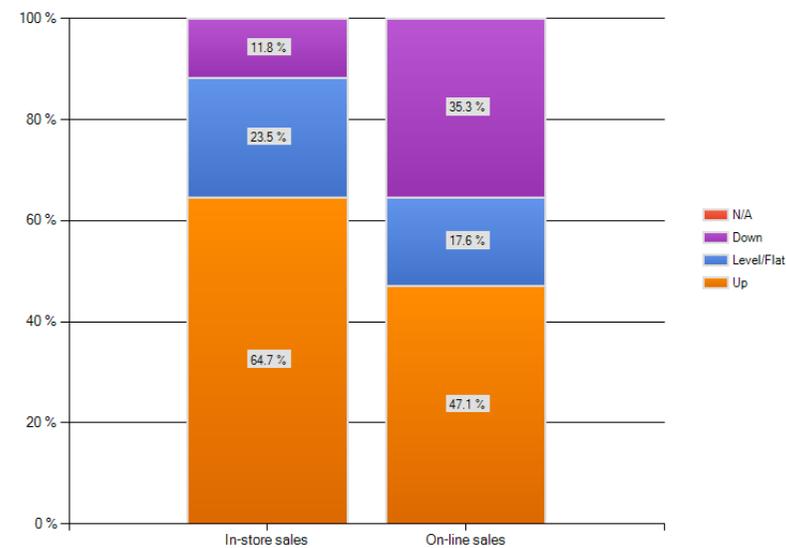
### All Respondents

How have the last 2 months sales (Oct/Nov) compared to the same period last year in terms of:



### Retailer Respondents

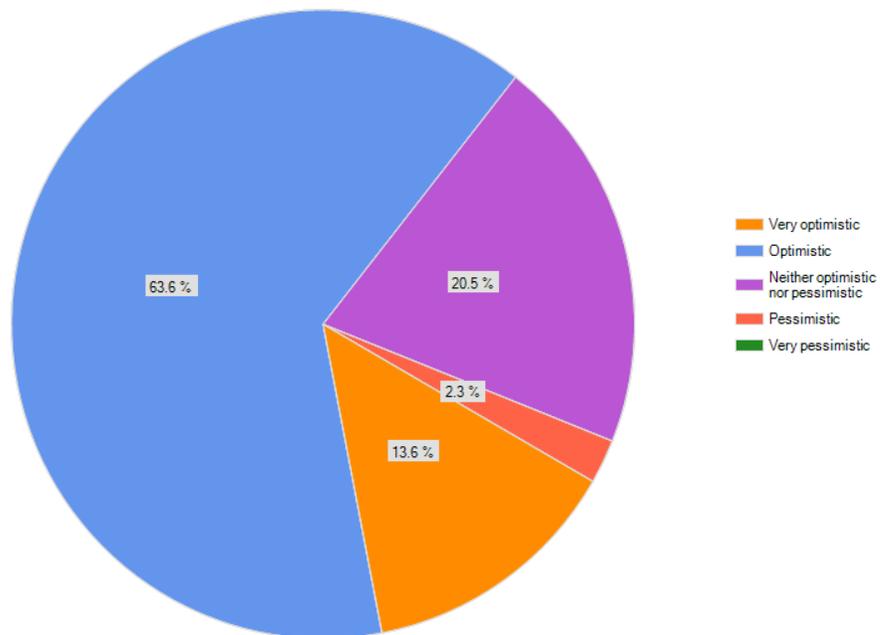
How have the last 2 months sales (Oct/Nov) compared to the same period last year in terms of:





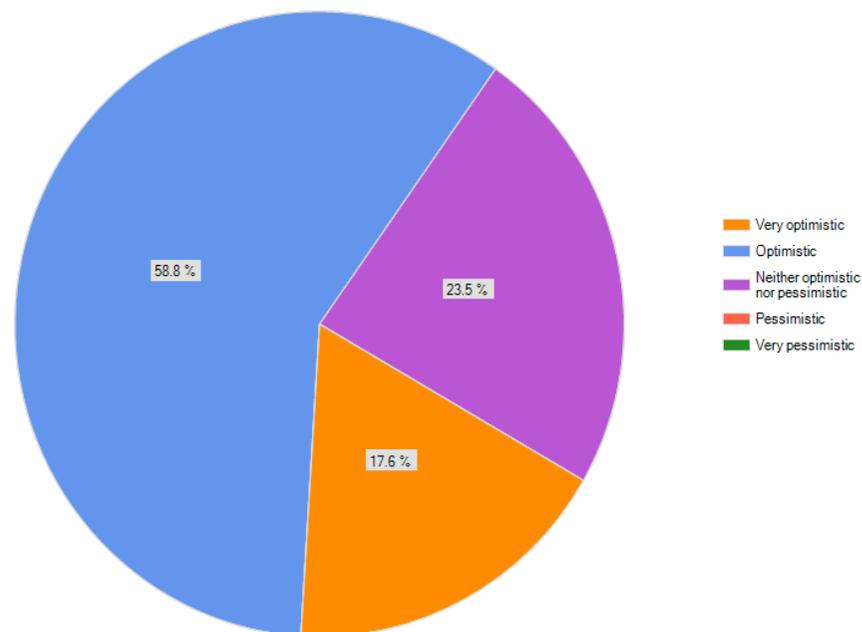
### All Respondents

How would you describe your business outlook for the next 2 months (Dec/Jan)?



### Retailer Respondents

How would you describe your business outlook for the next 2 months (Dec/Jan)?





## Is there anything you'd like to add or comments you would like to share?

### Comments from retailers:

- Suppliers selling direct to consumers via own website and ring fencing stock for that does not help the retailer. Retail premises are becoming showrooms where customers can view products, size, photograph, scan etc and then source elsewhere. Salomon's BASI deal - allowing purchase of any product at a heavily discounted price certainly does not help any retailer.
- Early signs seem to indicate a rise in the market. Seeing a few old customers who haven't skied for a while. Still too much general product on the market especially base layer, gloves, helmets etc. VERY good sales of boots for start of season and surprising sales of skis after last couple of poor years. Surprised at some wholesalers of major named brands supplying the likes of Costco etc. They will have to decide WHO they want to supply. It won't be the independants AND the 'cost cutters'.
- Roll on Easter - could do with a rest
- Sportsdirect . com will over reach there taget
- Only extreme weather i.e. local snow, and icy tempertures will impact positively in retailers favour, Long cold winter let's hope so.

### Comments from other respondents:

- We are very much weather dependant until the ski season really gets going , so with the mild Winter so far it does have a big Impact on our products Performance in the high street.
- Increased market consolidation with mild weather and consumer spending IT/electronics biased - apparel is competing for the discretionary spend
- Generally more positive. Sochi doesn't seem to be driving any extra business or enthusiasm.
- As a distributor this is the earliest we ever remember getting re-orders, and some bigger than the original order. Speaking to retailers there seems to be an air of optimism about. A cold snap in the UK and good snow in the mountains will only help improve the feeling out there, fingers crossed.