

winter tourism – upcoming trends, challenges, opportunities

Thomas Bausch
Munich University of Applied Sciences
Department of Tourism
Sonthofen 8th of June 2016

winter tourism - classification

winter

calendrical

December - March

climatic

winter weather
cold / humid / ice / snow

cultural elements

christmas time
winter cuisine
traditions/winter customs

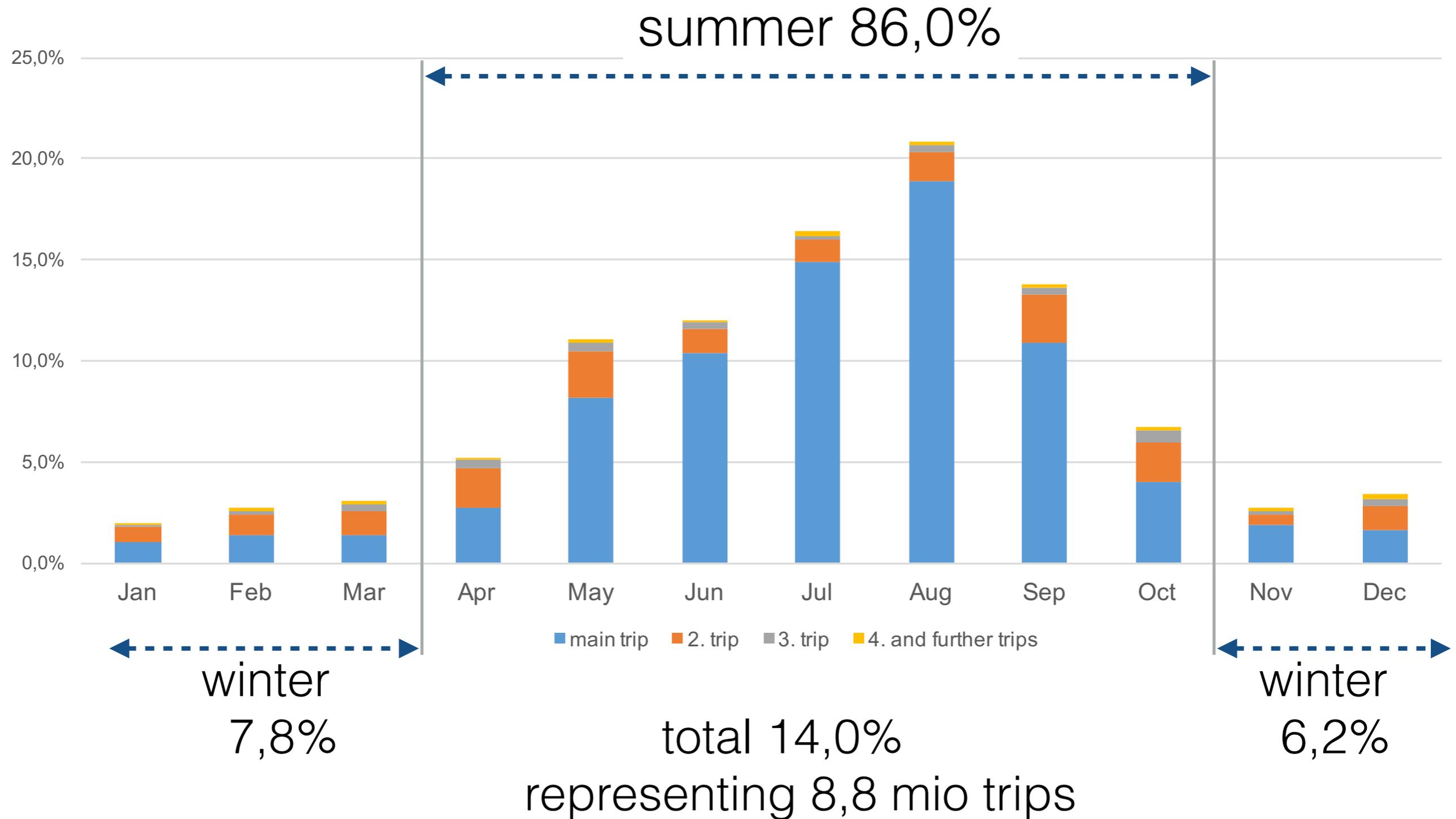
tourism:

holiday trips (5 days+)
and short trips (2-4 days)

winter season:

November to March

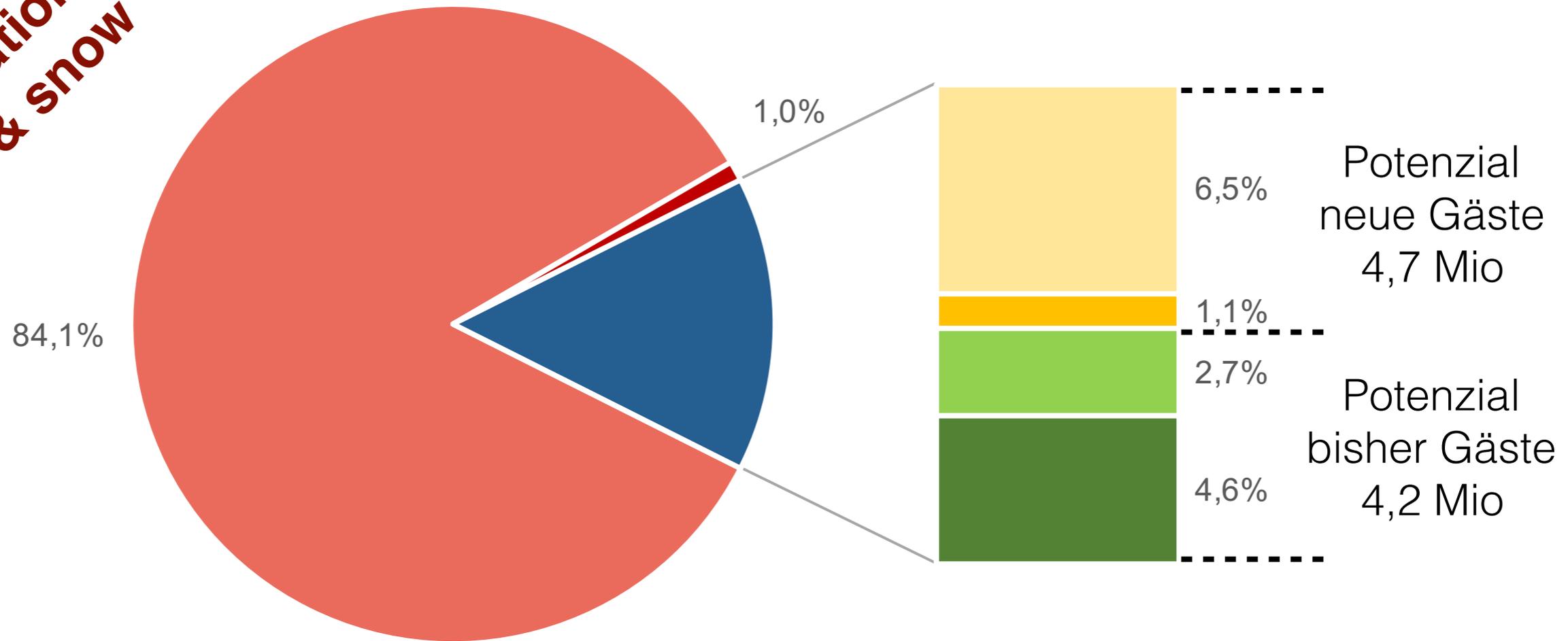
winter with small share of total German market



winter holidays at snow destinations

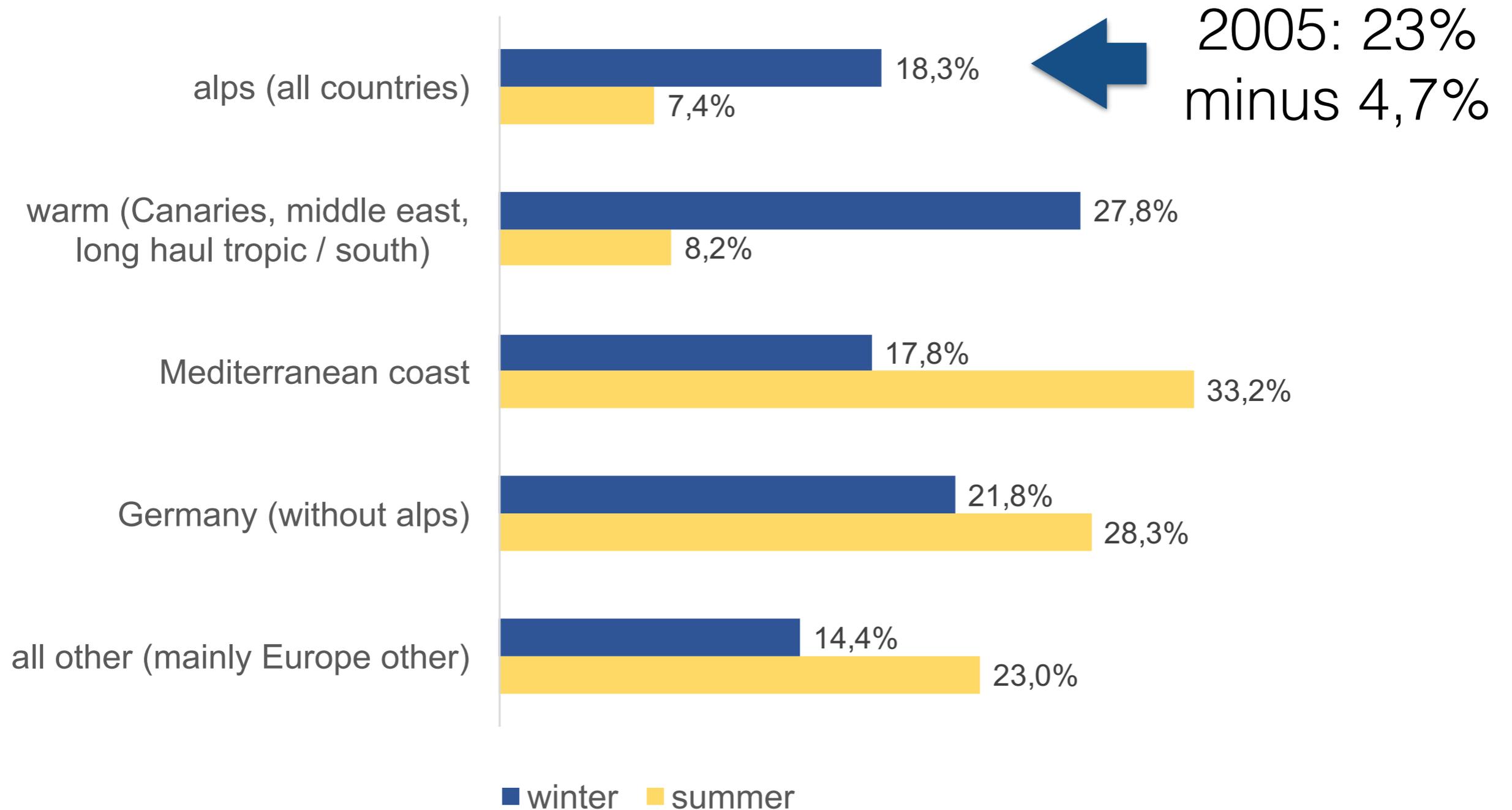
**attention:
all destinations
winter & snow**

"winter holidays in snow"
last 3 years next 3 years projection



- neither last 3 nor coming 3 years
- last 3 years - no return
- not last 3 years but next 3 years general an option
- not last 3 years but next 3 years quite sure
- visit in last 3 years and next 3 years general an option
- visit in last 3 years and next 3 years quite sure

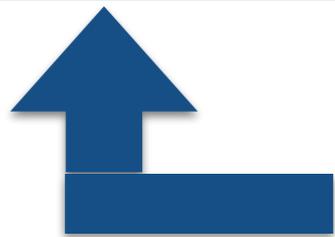
destination choice winter / summer



Travel market Germany
share of destinations per season
each season in total 100%
source: RA2016, own statistics

winter travelers compared by destination

Alps	DE (no Alps)	Mediterranean	long haul
1,6 Mio. trips	2,0 Mio. trips	2,4 Mio. trips	1,9 Mio. trips
81% car	67% car	88% plane	93% plane
38% hotel	34% hotel	79% hotel	65% hotel
785 € pro pers.	480 € pro pers.	1060 € pro pers.	2600 € pro pers.
8,6 days	8,5 days	12,5 days	21,9 days
5,4 travellers	2,6 travellers	2,9 travellers	2,4 travellers
23% with kids	12% with kids	7% with kids	1% with kids
45,4 years	51,6 years	53,7 years	47,0 years



73% winter sports (ski alpin / cross country) while holidays higher education, higher income, upper careers above average share of age groups 14-24 and 40-50 in average 2 holiday trips per year

hypothesis and related questions

hypothesis

The Alps do not cover dimensions of travel motives comprehensively

The Alps are not the preferred / only option having real „winter“ holidays

Alpine winter season offers do not match the expectations of many consumers

New winter guests have a very high interest in nature and therefore they have a high interest in sustainability

question

What are the travel motives in winter season

Which destinations do consumers consider as potential site for a real „winter“ holiday trip

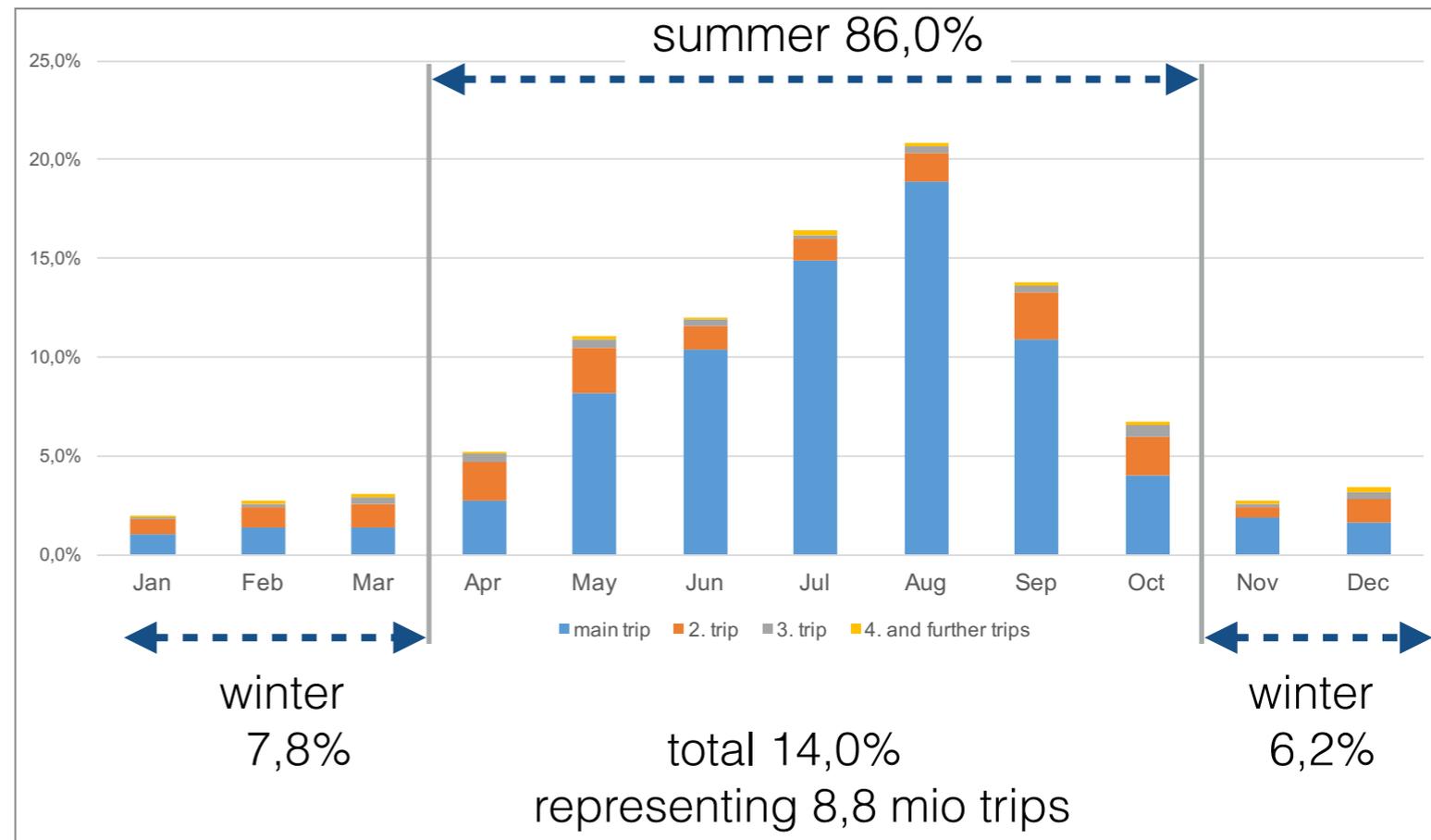
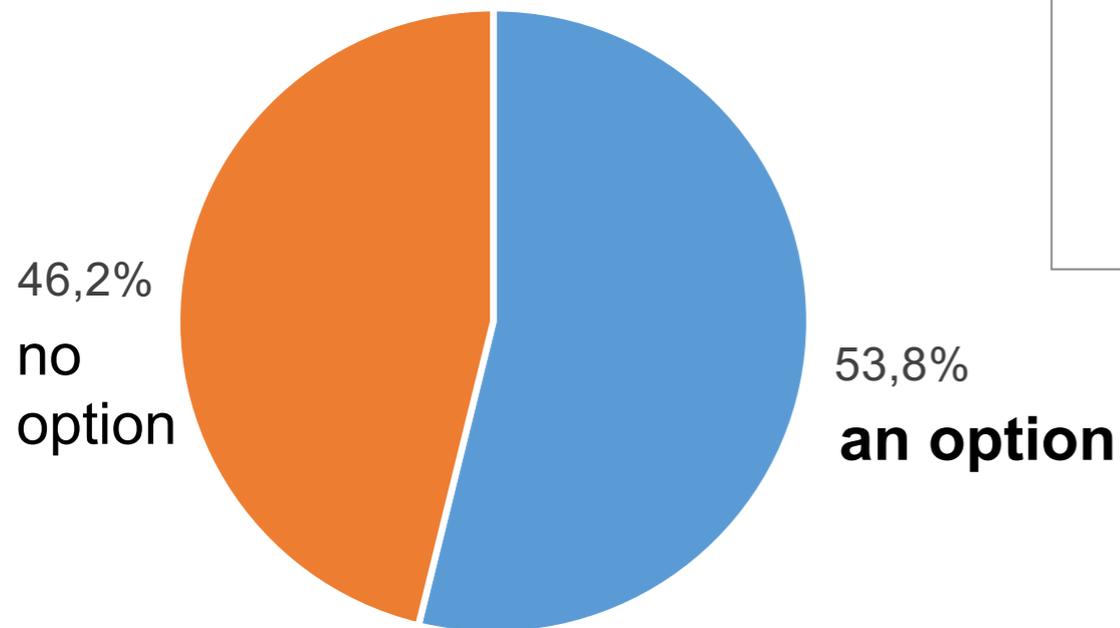
What do consumers expect from a winter holiday trip? Are there types of consumers with differing expectations?

Do there exist significant disparities of sustainability attitude in the field of traveling

winter: a small share of total German travel market

aber

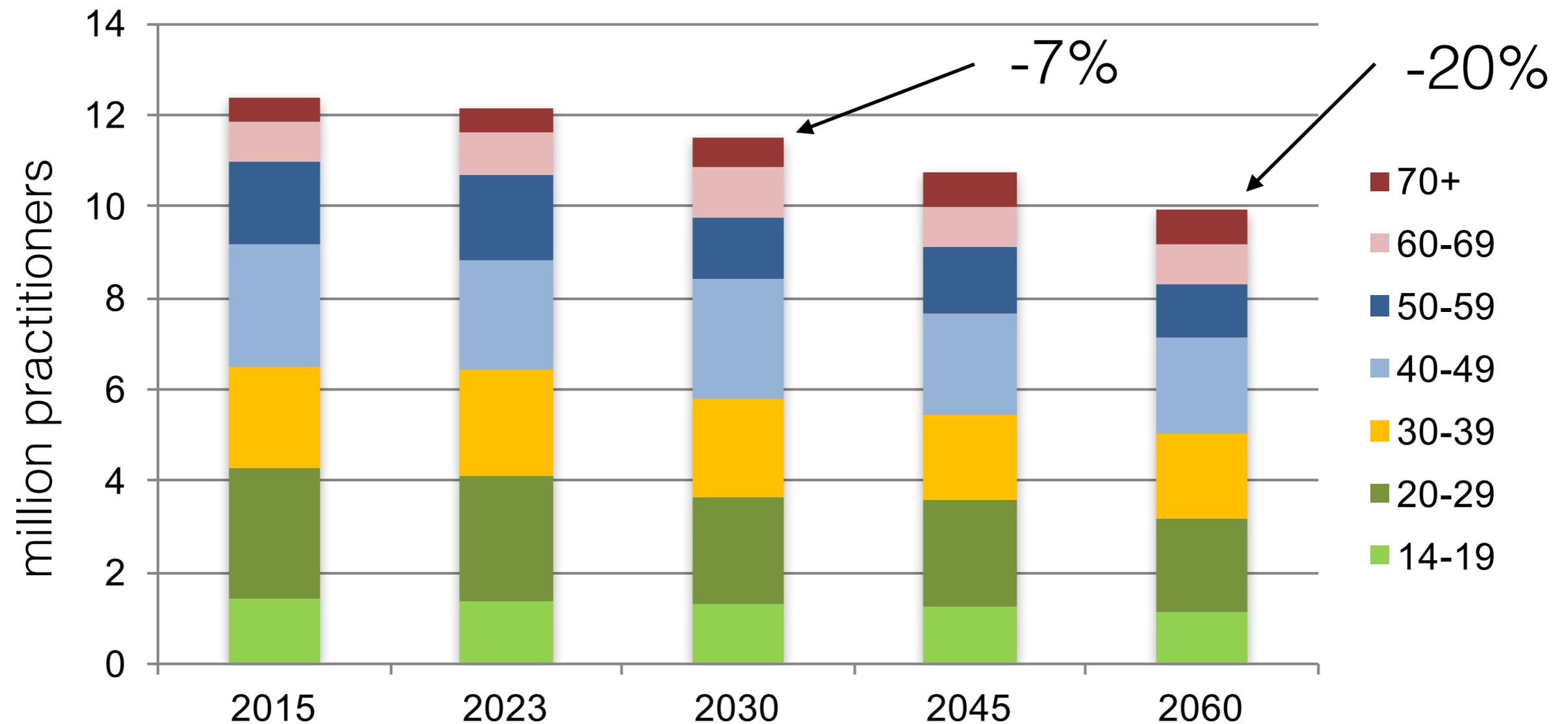
holiday trips
Nov - Mar German source market



Basis: Befragte mit mindestens einer
Urlaubsreise zwischen 2013 und 2015
Quelle: RA2016, eigene Berechnungen

increasing competition in segment winter sports

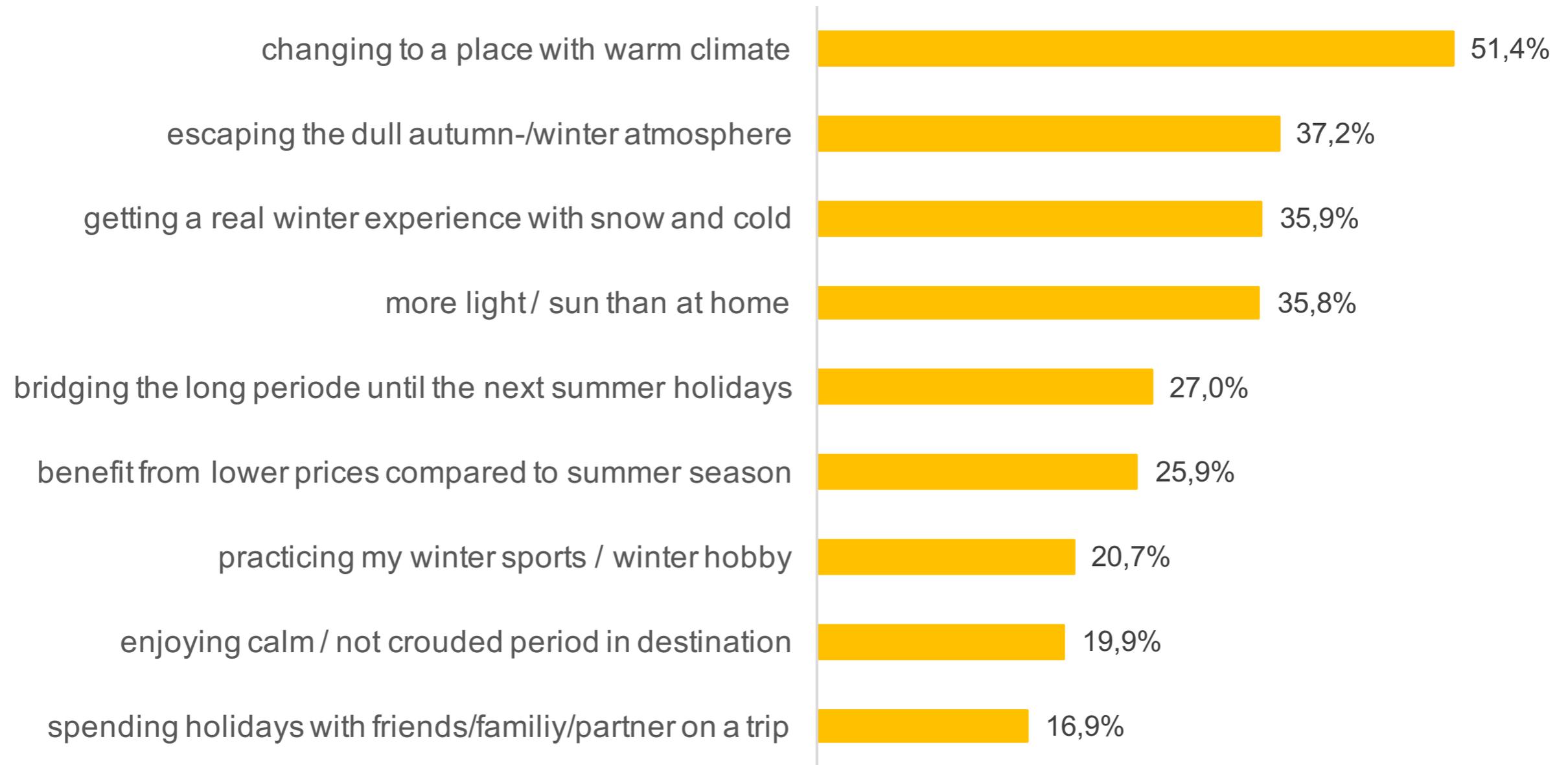
forecast potential winter sports practitioners Germany
(alpine skiing, snowboard, cross-country skiing)



base: winter sports by age groups - market data from b4p 2015/l
N=30.177; demography: population forecast of national statistics
agency Wiesbaden scenario 2: higher birth rate and immigration.
Hypothesis: constant entrance and exit probability winter sports.
Own calculation

why do people travel in winter?

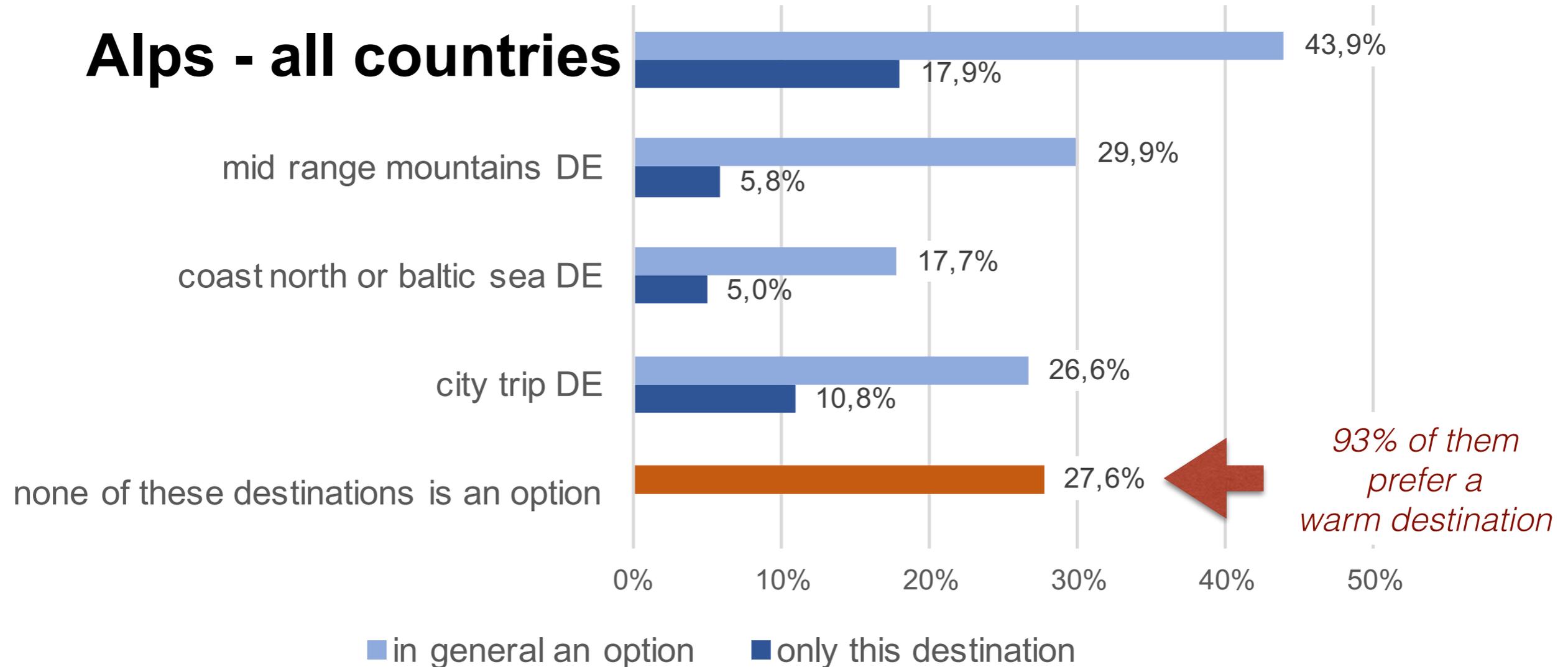
motives traveling in winter (Nov - Mar)



base: interviewees with at least one holiday trip in 2013 to 2015
data: RA2016, own calculations

choice of cold destinations - preferences

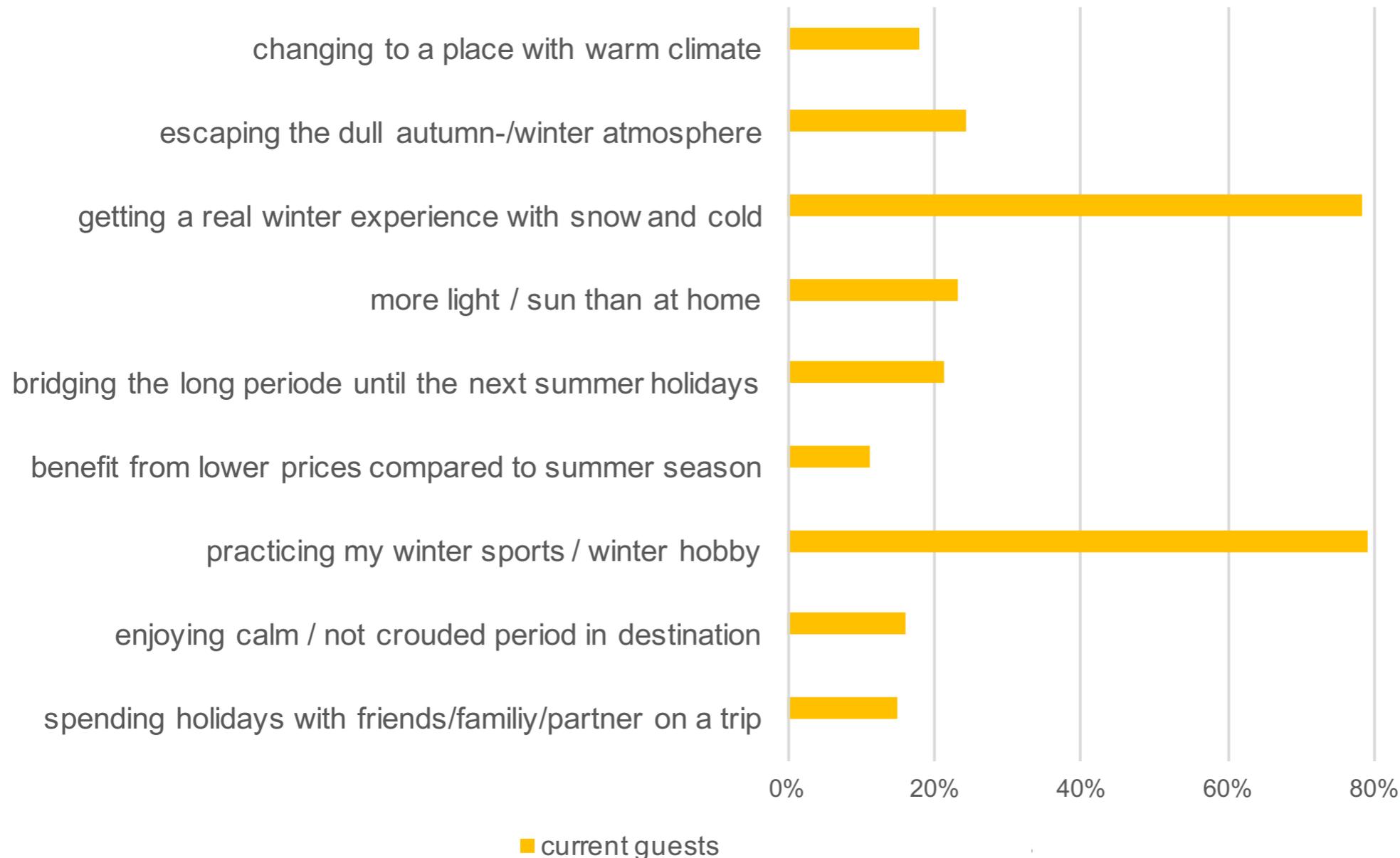
winter destinations - preferences



43,9% winter holidays in the alps is an option
but: 49,2% have other preferences and exclude the Alps as a destination option

travel motives „winter trip into snow“

travel motives "winter holidays in snow"

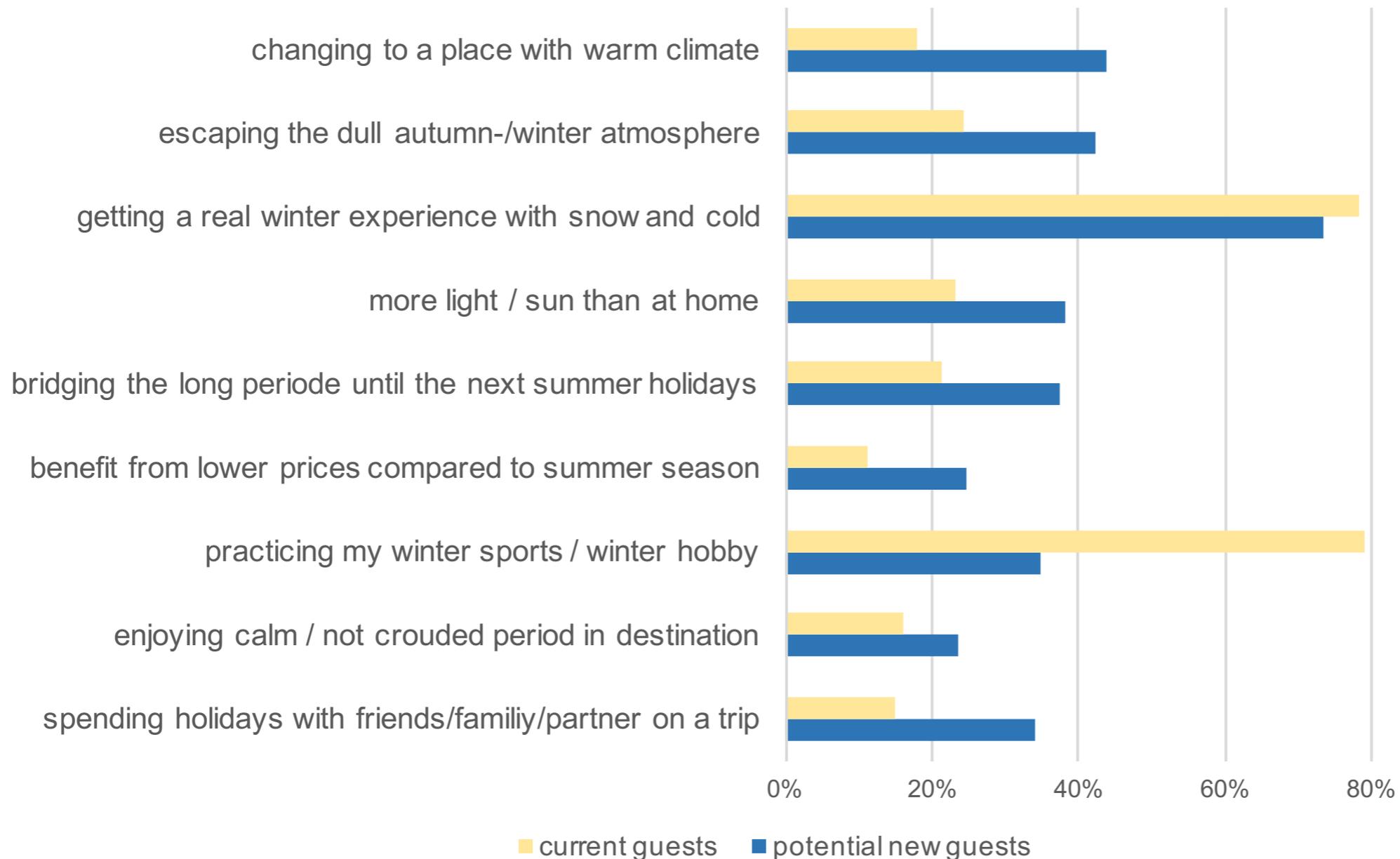


current guests
(= having had
at least one
„winter trip into
snow“ in the
last 3 years)

strong focus on
snow and cold
as basis for
for practicing
winter sports /
winter hobby

travel motives „winter trip into snow“

travel motives "winter holidays in snow"



potential new guests
 (= having had no „winter trip into snow“ in the last 3 years, but would be an option in the next 3 years)

motives much more mixed / winter sports less important

winter holidays: expectations

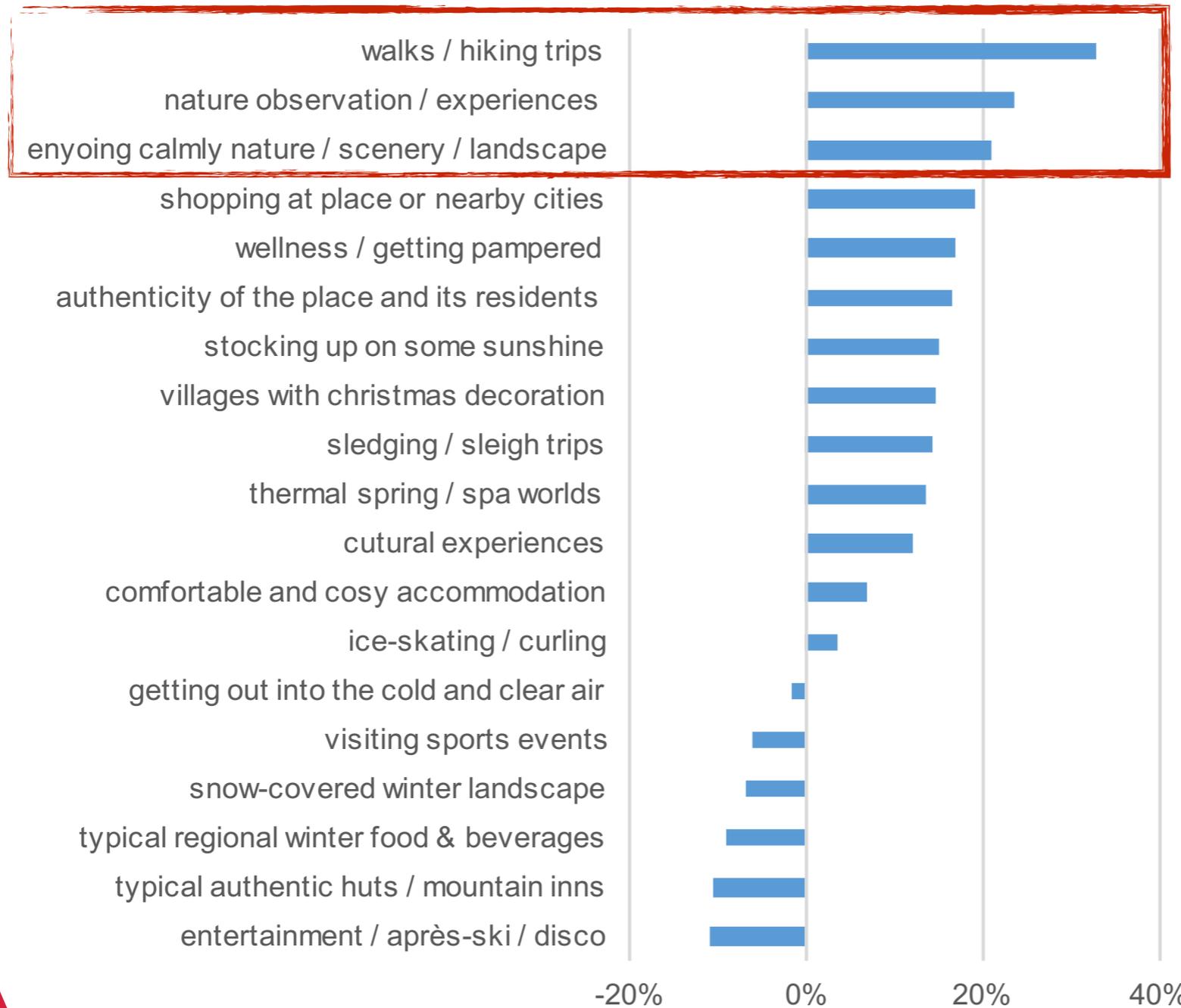
expectations winter holiday trip only interweaves with Alps as a winter destination option



without
real winter
a challenge

very different expectations by guest type

Comparison: practicing winter sports yes/no
 values above zero: non winter sports practitioners expect more
 differences: percentage points



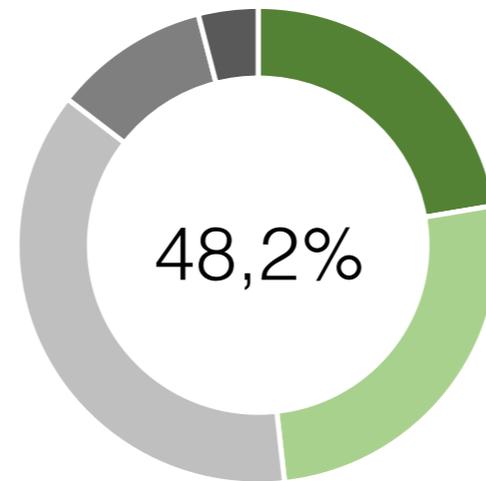
big differences in activities (walks / thinking trips) combined with nature observation and enjoying the scenery

base: interviewees with at least one holiday trip in 2013 to 2015
 data: RA2016, own calculations

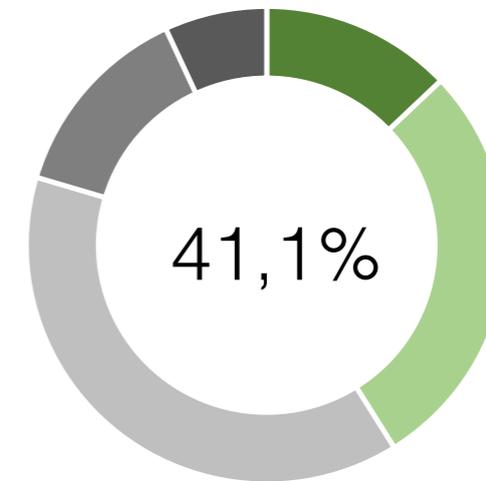
sustainability less important to winter sports practitioners

My holidays shall be ecologic compatible, resource conserving and environmentally friendly as possible

not practicing winter sports

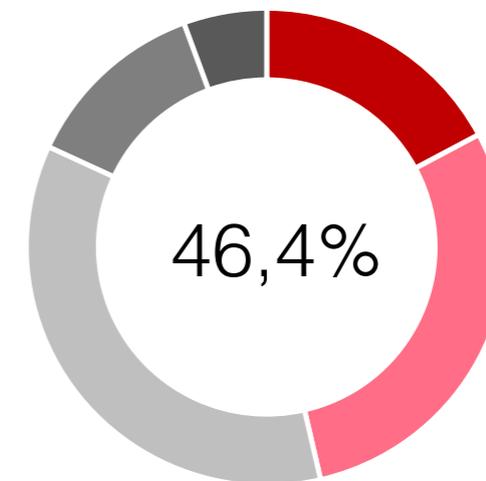
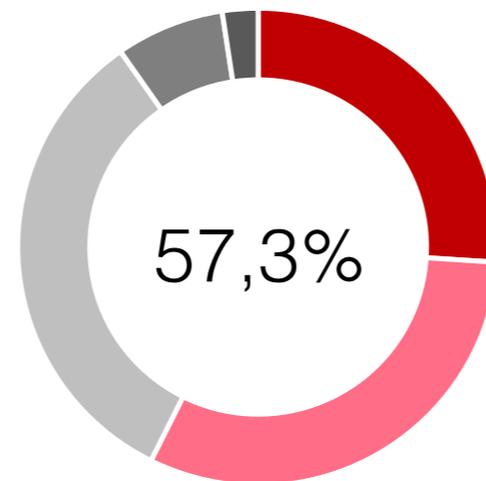


practicing winter sports



agreement
■ totally
■ mainly
■ not at all

My holidays shall be socially acceptable as possible (i.e. fair staff working conditions and respecting the local population)



agreement
■ totally
■ mainly
■ not at all

base: interviewees with at least one holiday trip in 2013 to 2015, Alps are a winter destination option, at least one winter holiday trip in snow in the last 3 years or intention to go on a trip in snow in next 3 years
 data: RA2016, own calculations

conclusions

1. The Alps are in winter season part of a very strong competition - only 17,9% of potentially winter travelers are fixated on Alps
2. The consumers picture of winter holidays in the Alps is strongly affected by snow covered sceneries; in relation to the total share of consumers interested in winter holidays winter sports is of secondary importance
3. Winter sports guests expect snow(guarantee), high quality board and accommodation - further expectations are subordinate
4. Guests not practicing winter sports expect beyond a good general quality experiences in a Alpine nature and related scenery, calmness and options for walks and hiking trips
5. Sustainability is on average level important to winter sports guests to non winter sports practitioners sustainability is of over average importance