winter tourism – upcoming trends, challenges, opportunities

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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

summer 86,0%

winter 7,8%

total 14,0%

representing 8,8 mio trips

winter 6,2%

Travel market Germany
source: RA2016, own statistics
winter holidays at snow destinations

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

Potenzial neue Gäste 4,7 Mio

Potenzial bisher Gäste 4,2 Mio

- 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

Reisemarkt Deutschland
Quelle: RA2016, eigene Berechnungen
destination choice winter / summer

- alps (all countries)
  - Winter: 18.3%
  - Summer: 7.4%

- warm (Canaries, middle east, long haul tropic / south)
  - Winter: 27.8%
  - Summer: 8.2%

- Mediterranean coast
  - Winter: 17.8%
  - Summer: 33.2%

- Germany (without alps)
  - Winter: 21.8%
  - Summer: 28.3%

- all other (mainly Europe other)
  - Winter: 14.4%
  - Summer: 23.0%

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

2005: 23% minus 4.7%
winter travelers compared by destination

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

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

Basis: holiday trips (5+ days) of Germans of an age of 14+ years, in „winter“=Jan-Mar, Nov-Dec 2015. Source: RA2016
<table>
<thead>
<tr>
<th>hypothesis</th>
<th>question</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Alps to not cover dimensions of travel motives comprehensively</td>
<td>What are the travel motives in winter season</td>
</tr>
<tr>
<td>The Alps are not the preferred / only option having real „winter“ holidays</td>
<td>Which destinations do consumers consider as potential site for a real „winter“ holiday trip</td>
</tr>
<tr>
<td>Alpine winter season offers do not match the expectations of many consumers</td>
<td>What do consumers expect from a winter holiday trip? Are there types of consumers with differing expectations?</td>
</tr>
<tr>
<td>New winter guests have a very high interest in nature and therefore they have a high interest in sustainability</td>
<td>Do there exist significant disparities of sustainability attitude in the field of traveling</td>
</tr>
</tbody>
</table>
winter: a small share of total German travel market

aber

holiday trips Nov - Mar German source market

46,2%
no option

53,8%
an option

summer 86,0%

total 14,0% representing 8.8 mio trips

winter 7,8%

winter 6,2%

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/I
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)

- changing to a place with warm climate: 51.4%
- escaping the dull autumn-/winter atmosphere: 37.2%
- getting a real winter experience with snow and cold: 35.9%
- more light / sun than at home: 35.8%
- bridging the long period until the next summer holidays: 27.0%
- benefit from lower prices compared to summer season: 25.9%
- practicing my winter sports / winter hobby: 20.7%
- enjoying calm / not crowded period in destination: 19.9%
- spending holidays with friends/family/partner on a trip: 16.9%

base: interviewees with at least one holiday trip in 2013 to 2015
data: RA2016, own calculations
choice of cold destinations - preferences

winter destinations - preferences

Alps - all countries

- 43.9% prefer winter holidays in the Alps
- 49.2% have other preferences and exclude the Alps as a destination option

43.9% winter holidays in the Alps is an option

but: 49.2% have other preferences and exclude the Alps as a destination option

93% of them prefer a warm destination
travel motives „winter trip into 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 practicing winter sports / winter hobby

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

- changing to a place with warm climate
- escaping the dull autumn/-winter atmosphere
- getting a real winter experience with snow and cold
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- enjoying calm / not crowded period in destination
- spending holidays with friends/family/partner on a trip
travel motives „winter trip into snow“

travel motives "winter holidays in snow"

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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

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

**Expectations Winter Holiday Trip**

Only interwees with Alps as a winter destination option

<table>
<thead>
<tr>
<th>Experience</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Snow-covered winter landscape</td>
<td>88%</td>
</tr>
<tr>
<td>Comfortable and cozy accommodation</td>
<td>64%</td>
</tr>
<tr>
<td>Typical authentic huts / mountain inns</td>
<td>59%</td>
</tr>
<tr>
<td>Winter sports: Alpine or cross country ski, snowboard</td>
<td>58%</td>
</tr>
<tr>
<td>Enjoying calmly nature / scenery / landscape</td>
<td>54%</td>
</tr>
<tr>
<td>Walks / hiking trips</td>
<td>49%</td>
</tr>
<tr>
<td>Typical regional winter food &amp; beverages</td>
<td>48%</td>
</tr>
<tr>
<td>Getting out into the cold and clear air</td>
<td>48%</td>
</tr>
<tr>
<td>Thermal spring / spa worlds</td>
<td>41%</td>
</tr>
<tr>
<td>Sledding / Sleigh trips</td>
<td>39%</td>
</tr>
<tr>
<td>Entertainment / après-ski / disco</td>
<td>36%</td>
</tr>
<tr>
<td>Wellness / getting pampered</td>
<td>34%</td>
</tr>
<tr>
<td>Stocking up on some sunshine</td>
<td>31%</td>
</tr>
<tr>
<td>Authenticity of the place and its residents</td>
<td>29%</td>
</tr>
<tr>
<td>Shopping at place or nearby cities</td>
<td>28%</td>
</tr>
<tr>
<td>Nature observation / experiences</td>
<td>26%</td>
</tr>
<tr>
<td>Villages with Christmas decoration</td>
<td>25%</td>
</tr>
<tr>
<td>Visiting sports events</td>
<td>18%</td>
</tr>
<tr>
<td>Cultural experiences</td>
<td>15%</td>
</tr>
<tr>
<td>Ice-skating / curling</td>
<td>14%</td>
</tr>
</tbody>
</table>

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

- walks / hiking trips
- nature observation / experiences
- enjoying calmly nature / scenery / landscape
- shopping at place or nearby cities
- wellness / getting pampered
- authenticity of the place and its residents
- stocking up on some sunshine
- villages with christmas decoration
- sledding / sleigh trips
- thermal spring / spa worlds
- cultural experiences
- comfortable and cosy accommodation
- ice-skating / curling
- getting out into the cold and clear air
- visiting sports events
- snow-covered winter landscape
- typical regional winter food & beverages
- typical authentic huts / mountain inns
- entertainment / après-ski / disco

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

not practicing winter sports: 48.2%
practicing winter sports: 41.1%

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

not practicing winter sports: 57.3%
practicing winter sports: 46.4%

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 tip in snow in next 3 years data: RA2016, own calculations
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