

Mountain Holiday Market Trends



24 and 26 April, 2018
Ulf Sonntag, NIT



Global tourism trends

European trends for nature, active
and mountain holidays

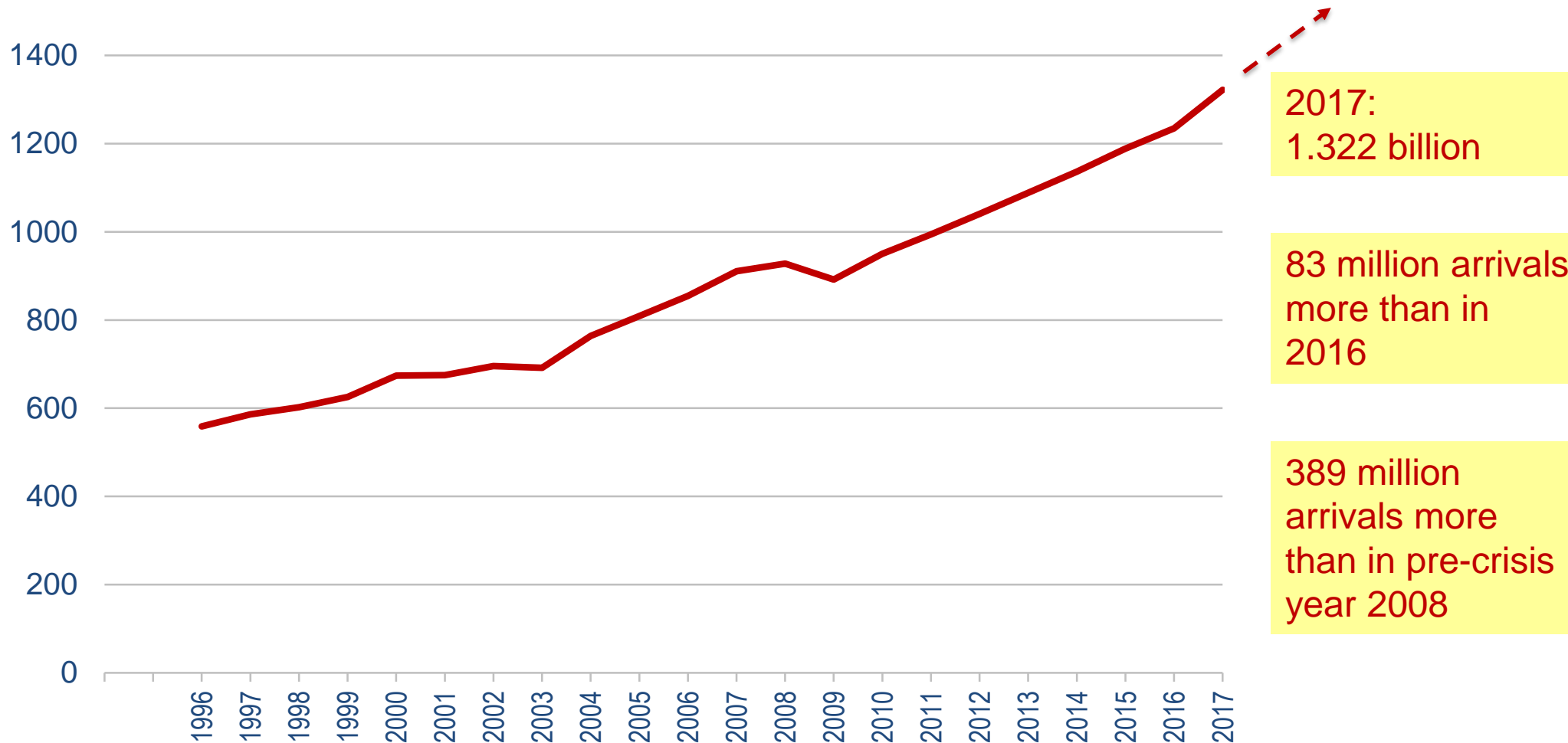
Market developments in Germany and France
regarding mountain holidays

Image of Catalunya in Germany and France

Promising segments of potential travellers

How to reach the potential travellers.

Global tourism flows: Number of international arrivals is continuously growing

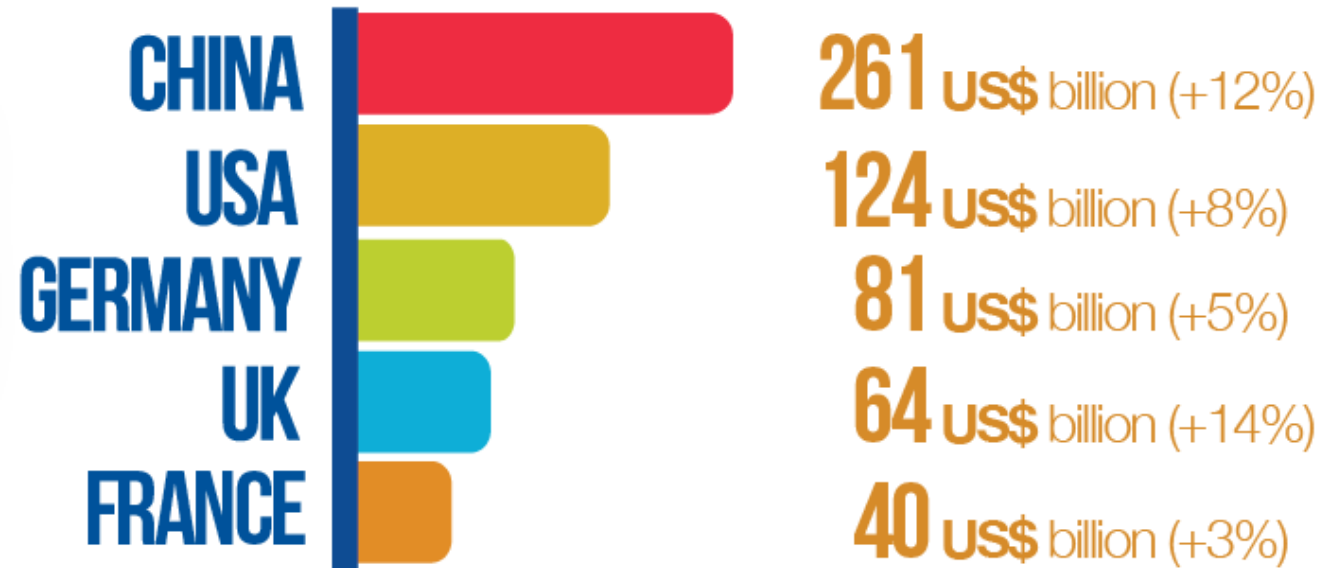


International arrivals 2016: Breakdown by continents

Europe is by far the biggest destination



World's Top Tourism Spenders: International tourism expenditure 2016



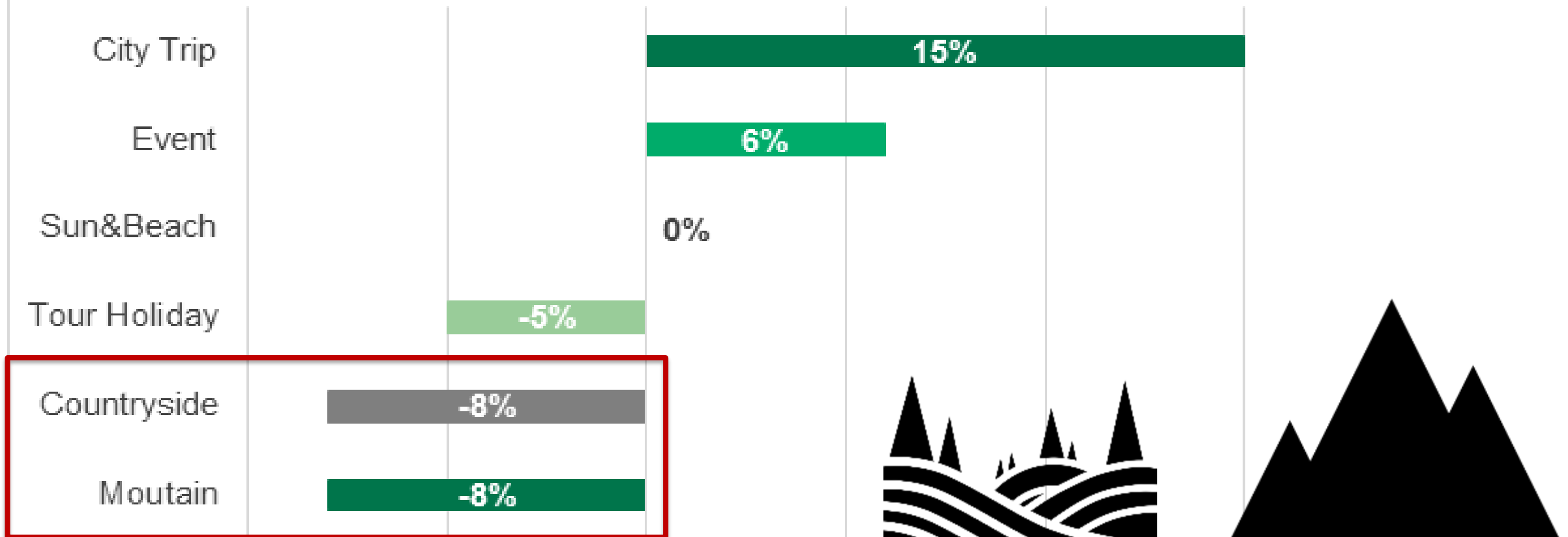
Type of holidays: Trends in Europe, Asia and USA

Mountain and country declining in Europe, growing in Asia and USA

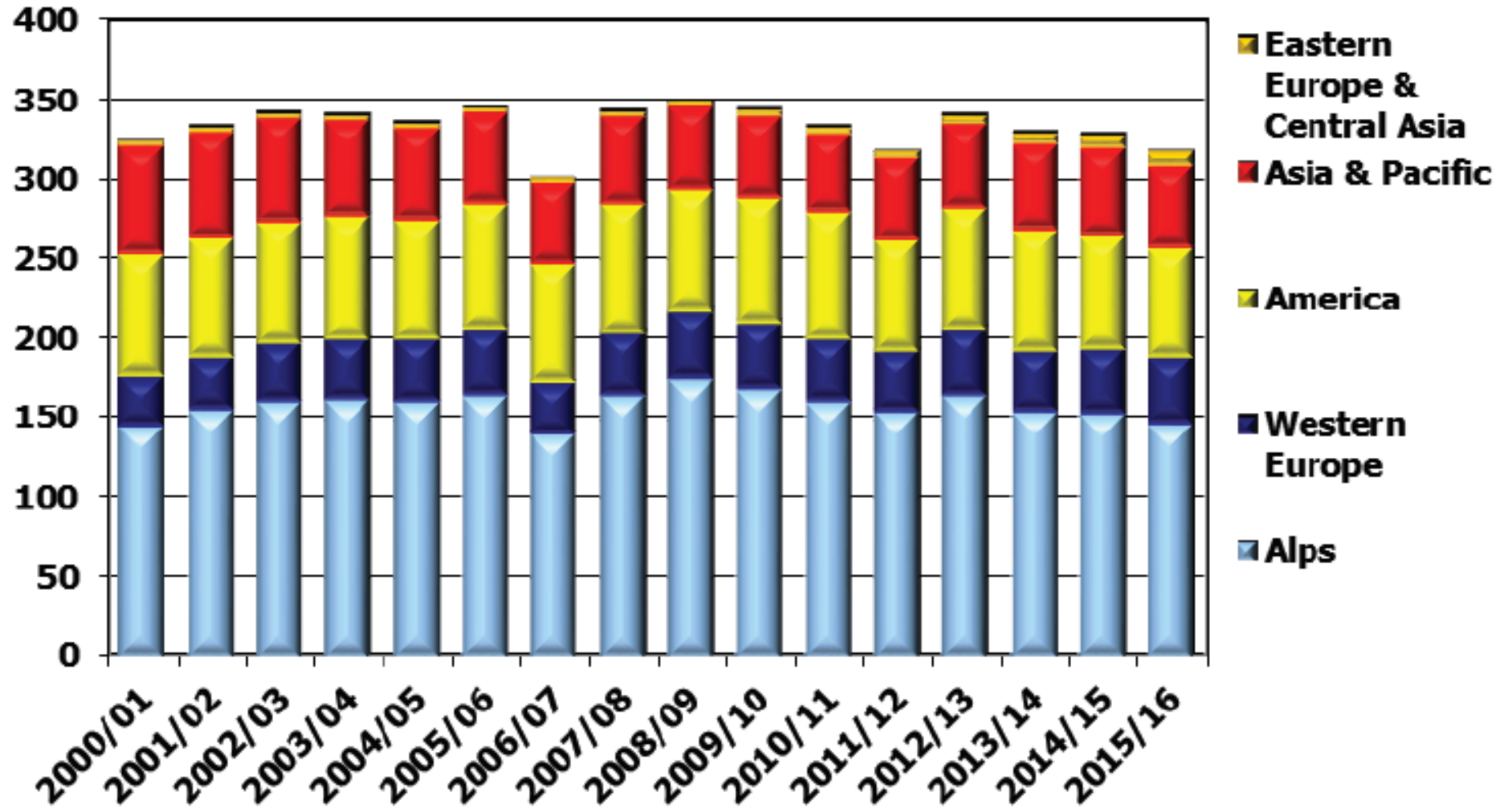


Type of Holiday

European Outbound Travel Trends 1-8, 2016



Evolution of worldwide ski visits: Small decline in recent years, specially in the Alps



What do we learn for the Catalan Pyrenees?



- International tourism is growing
- Europe is the top destination
- Main outgoing markets for tourism in Europe are Germany, UK, France
- Mountain and countryside holidays are currently decreasing in Europe
- The Alps are the main region for ski visits.
The total number of visits is stagnating.
The number of ski visits in the Alps is decreasing

→ Look out for potential markets and segments

Interest in the population for “an active holiday where I do or see a lot of things”



45%



38%



44%



38%



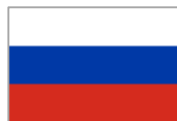
41%



33%



40%



32%



40%



26%



Main reasons for going on holidays 2015 for European travellers

“**NATURE**: mountain, lake, landscape, etc.”



55%



30%



50%



23%



49%



22%



40%



22%



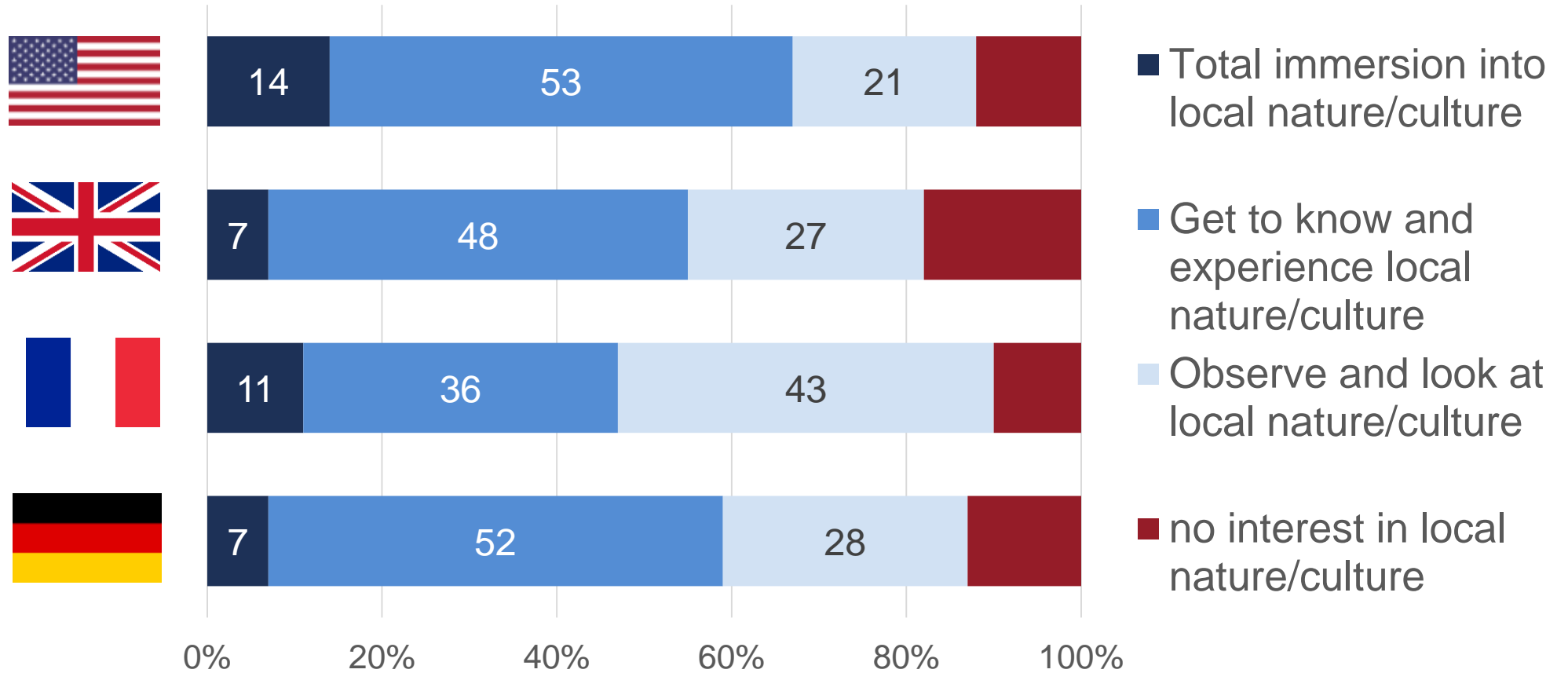
37%



18%



How do the travellers want to experience the nature and culture of their holiday destination

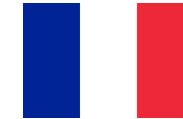


What do we learn for the Catalan Pyrenees?



- Looking at the Top 10 global outbound markets, we find a relevant share of “active” and “sightseeing” travellers in each market.
 - Looking at the main outbound markets in the EU, we find a relevant share of Nature/mountain travellers in each market.
 - There are big differences between the markets, even between neighbouring countries in Europe!
 - Also, the preferences how to experience nature/culture differ between the markets
- The general interest in the destination and for nature is there
- If there is something interesting to do or see in the mountains, there should be a significant demand for it
- Differences in the source markets have to be considered

Germany and France



Germany		France	
77% RI	54 million travellers 4+ nights	35 million	63%
72% Ausland	50 million long trips abroad	18 million	20%
1. Destination abroad	9 million trips to Spain	4 million	1. Destination abroad



How are the Germans travelling: Sun&beach dominates

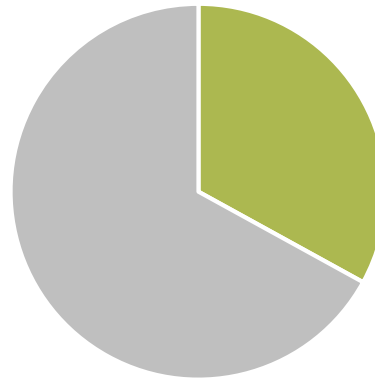


Sun&beach



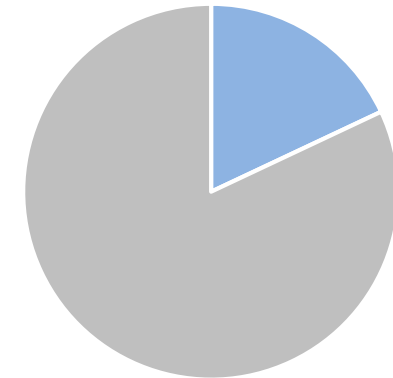
UP

Destination experience (nature/culture)



UP

Active/sports

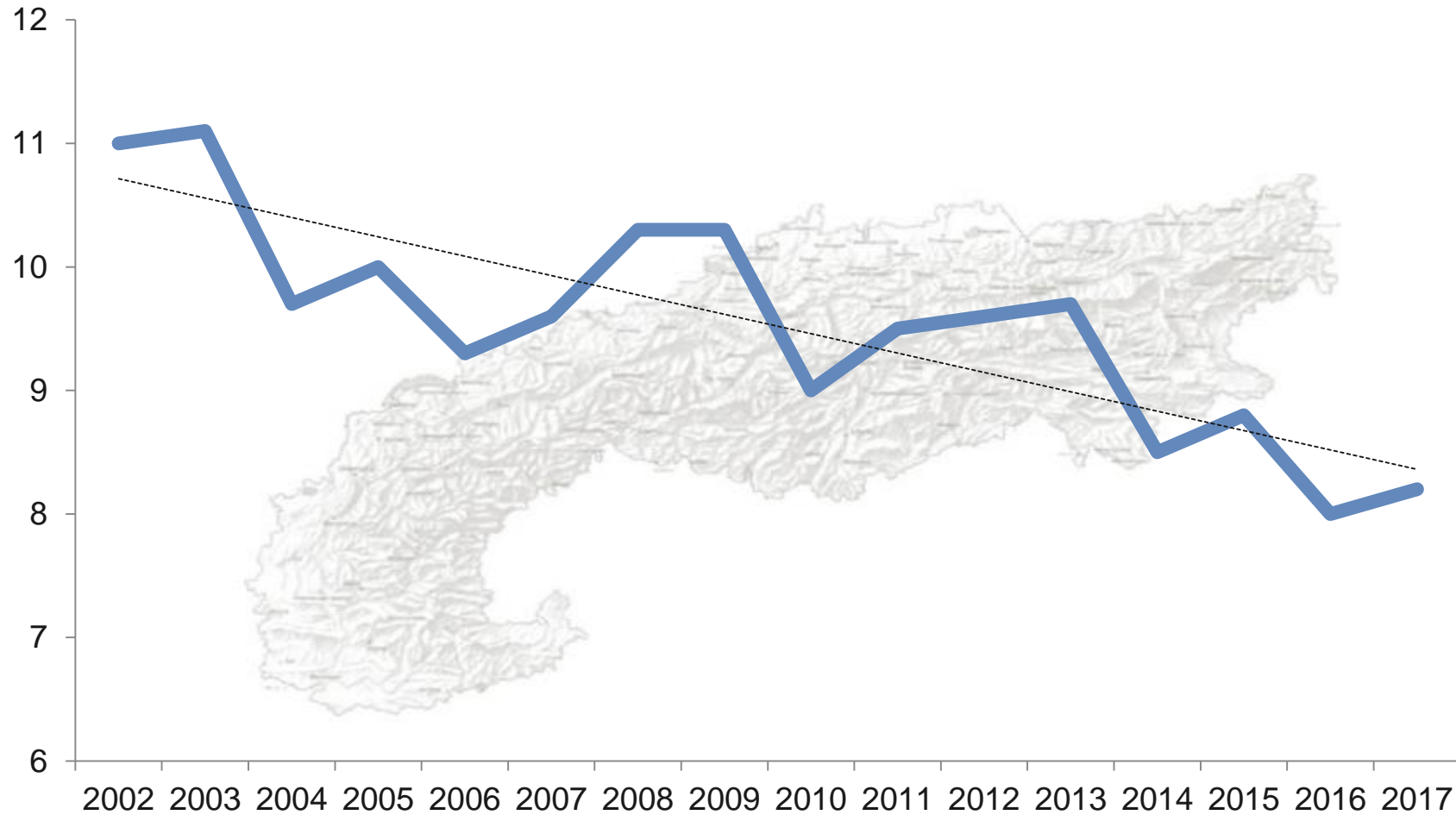


SAME

Generally: More comfort, more variation, rising expectations



Where do the Germans travel: Shrinking market share of the Alps



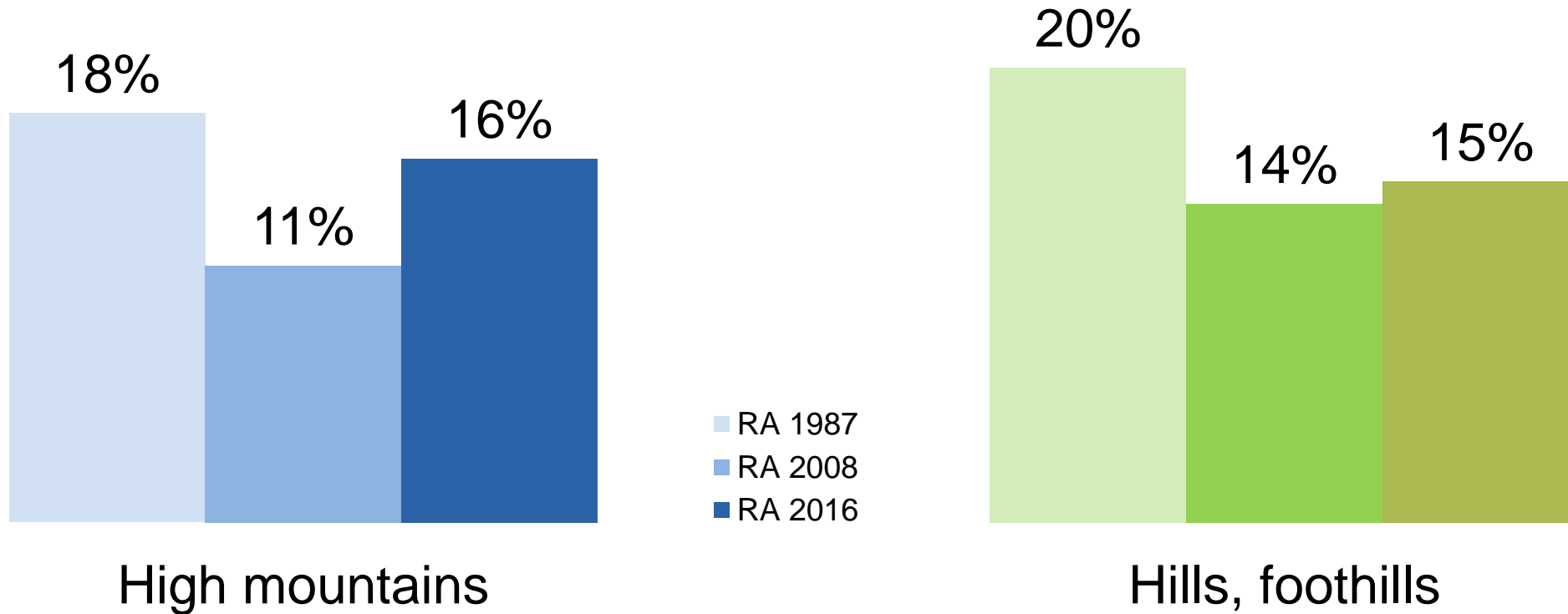
Trend 2025: 7,0%
(4,8 million = -0,9 million ggü. 2015)



Silver lining on the horizon? Rising interest for mountain holidays



Preferred landscape for a holiday:



France mountain holidays: declining



2012: 38 million (domestic) mountain holidays (long and short)	- 8% (-3.2 million)	2016: 34,8 million
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What do we learn for the Catalan Pyrenees?



GERMANY:

- The German market as a whole has been and will be very stable.
- There is a substantial segment of travellers who are interested in the nature/culture of a destination – nevertheless sun&beach is dominating
- Ongoing decline of the market share of the Alps → Silver lining on the horizon: Rising interest for mountain holidays and for destinations in the Alps

FRANCE:

- Also the French love to travel
- Domestic travel is dominating
- Mountain holidays are declining in recent years

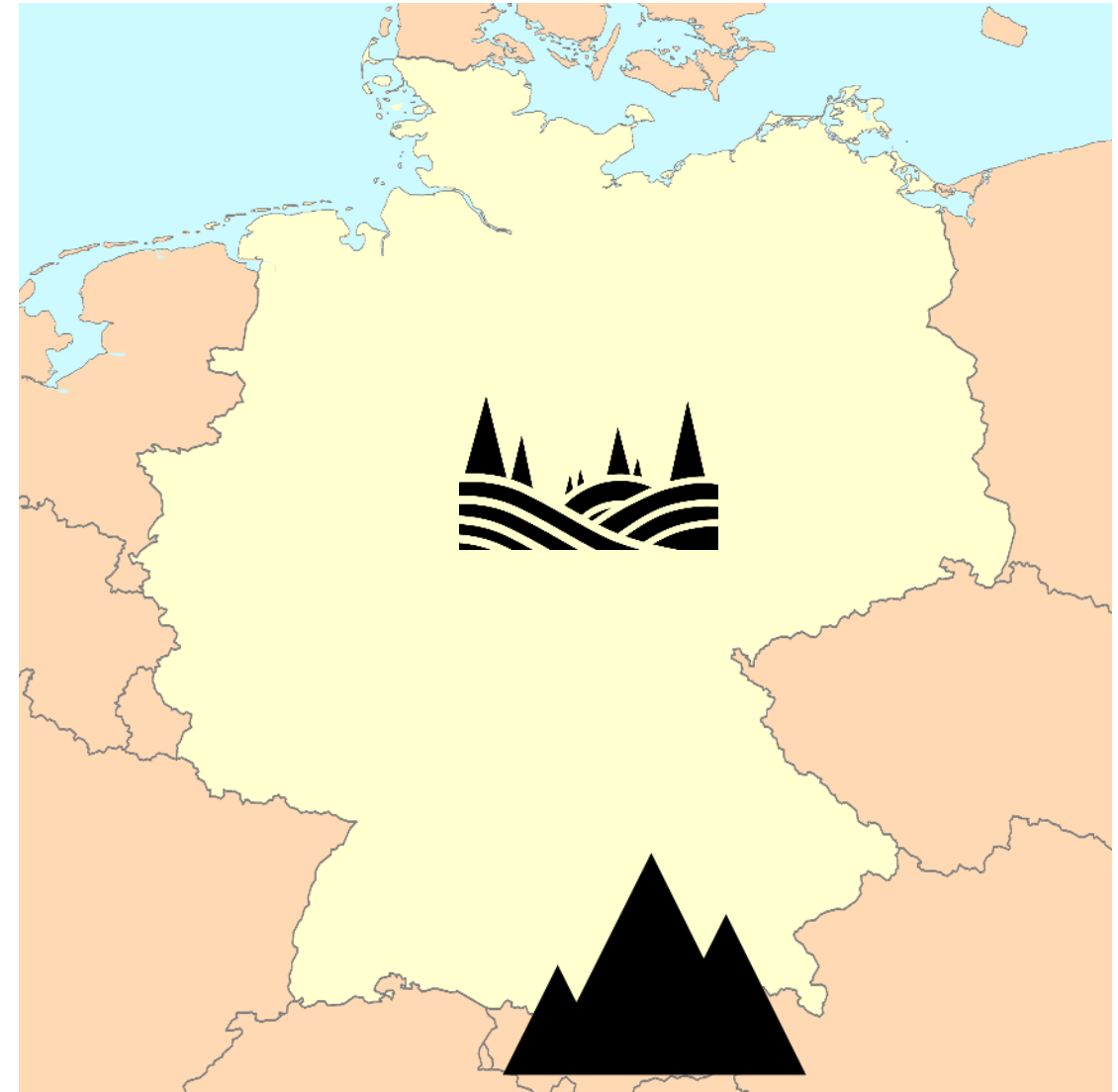
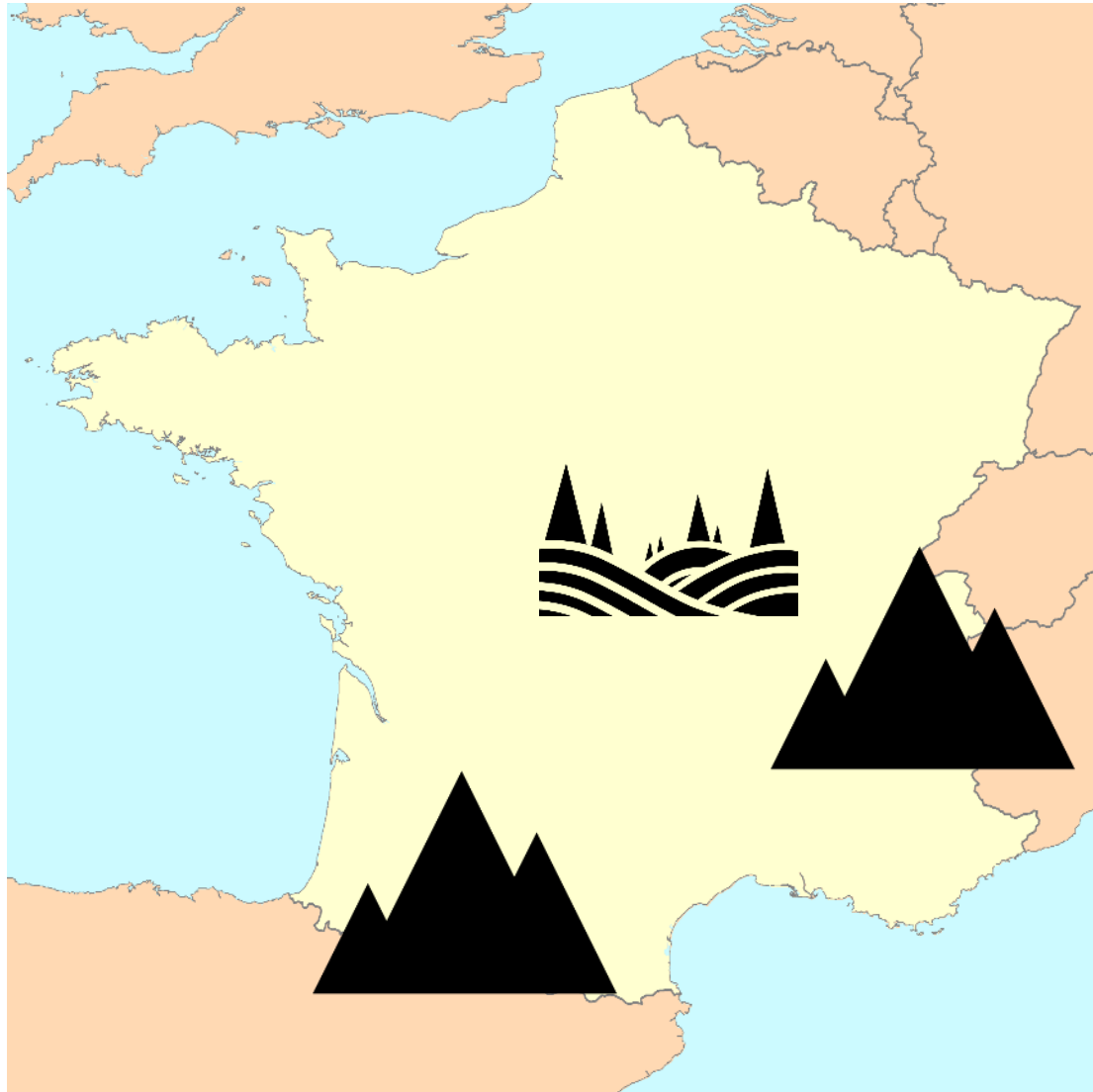
→ Germany and France: Challenging for mountain destinations

→ Understand, adapt, find the right segments

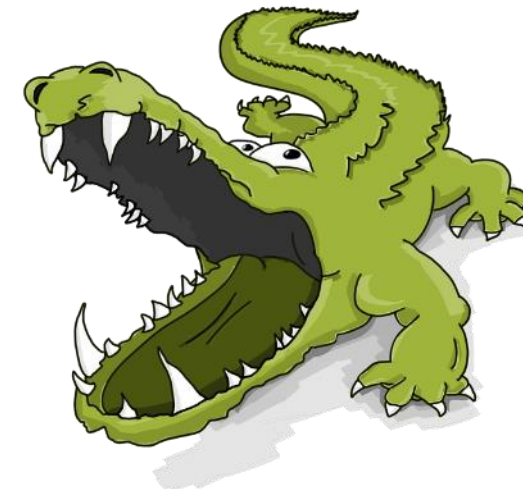
Humans tend to simplify: They think in boxes



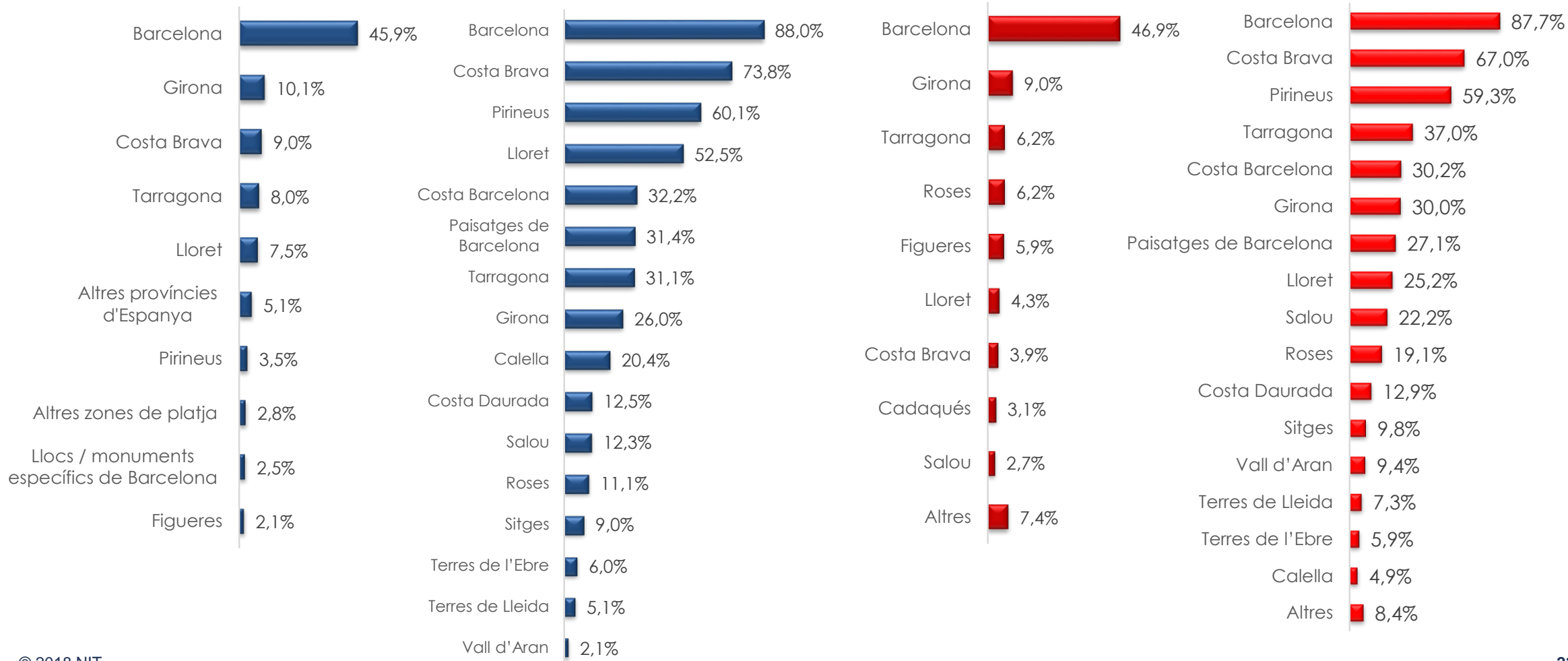
Choosing a holiday destinations is often about geography



Choosing a holiday destinations is also about images



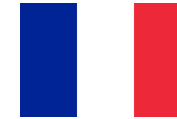
The Pyrenees are not to-of-mind when thinking about Catalunya



Catalunya is mainly connected with sun&beach, city and culture



In Germany the Pyrenees make it in the top5 of Catalunya's image



Coneixement de la marca

Si us plau, ordeni de major a menor importància els cinc elements que vostè destacaria de Catalunya?



Total mostra: 810

Coneixement de la marca

Si us plau, ordeni de major a menor importància els cinc elements que vostè destacaria de Catalunya?



Total mostra: 900

What do we learn for the Catalan Pyrenees?



- Humans tend to simplify and think in “boxes”
- In France and Germany mountain holidays mainly happen “at their doorstep”
- Catalunya is very much known for Barcelona and its coastal regions – this goes together with being perceived first and foremost as a beach and city destination
- The Pyrenees are also rooted in the image of Catalunya – but to a lesser extend Barcelona and the coast.

→ it is not easy to “lure” the French and Germans across “their” mountains.

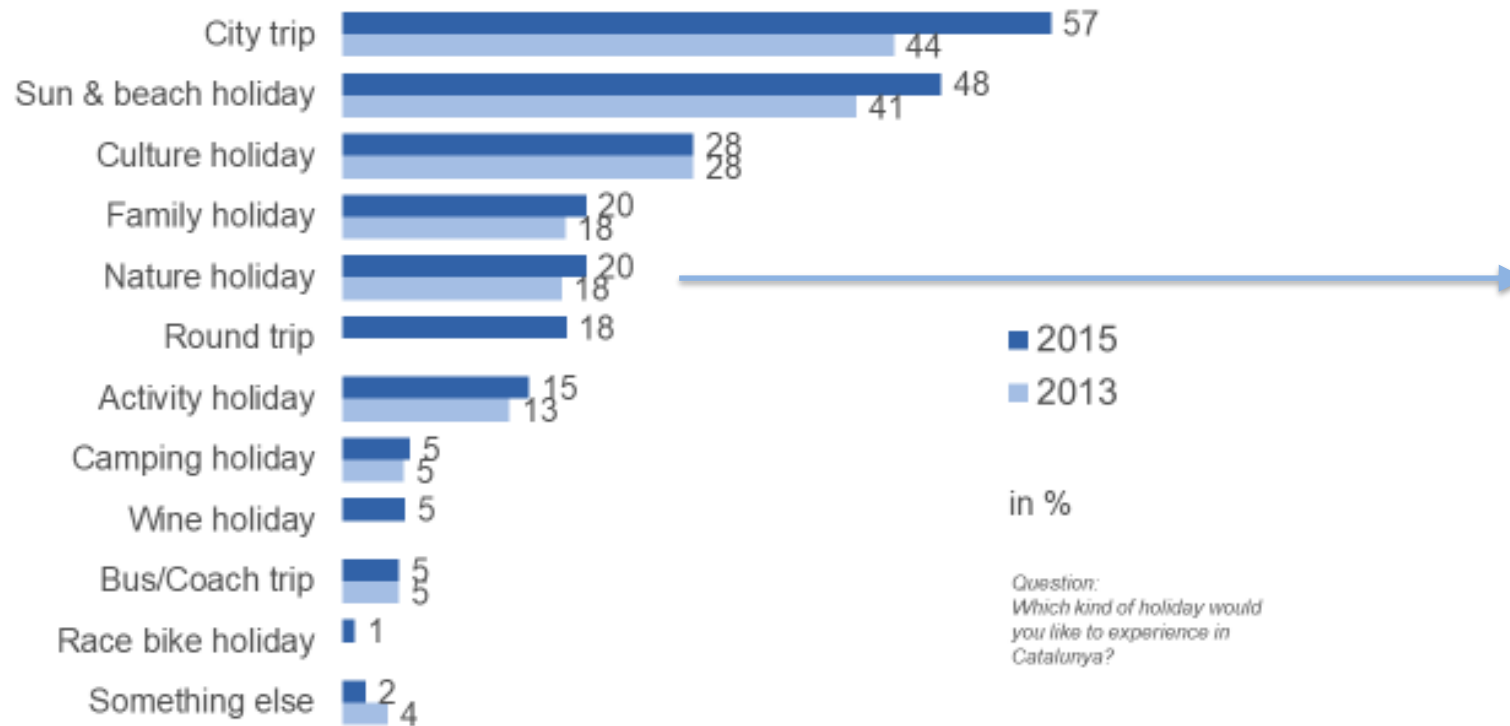
→ There is a basis to tackle the mountain travellers in both markets



Potential travellers to Catalunya: The nature segment



Preferred forms of holiday: 57% of all potential Catalunya guests would like to go on a city trip in Catalunya, 48% like sun&beach



3.2 million
Interest Catalunya 2017-2019
and very interested in nature holiday

■ 2015
■ 2013
in %

Question:
Which kind of holiday would
you like to experience in
Catalunya?

Basis: Persons interested to travel to Catalunya, Costa Brava, Costa Daurada and/or Barcelona in the next 5 years within the German-speaking population 14-70 years
Source: RA online 5/2013 and 05/2015





Potential NATURE travellers to Catalunya: Profile



distinguishing general holiday motivation	Nature Sports Adventure Culture
distinguishing general holiday activities	Walking/hiking See nature Cycling See culture

stage of life	40+ couples
household net income	Ø 3,058 €
Residency**	West, South



NATURE holidays into the Mediterranean region: Profile



Ø spending per person	1,183 € total 93 € per day
Ø duration	13.9 days
Ø no. of travellers	2.8

Saison	summer 37% autumn 33% spring 24%
Organisation	package 60% accom. 21% ticket 17%
Accommodation	hotel 58% apt. 27%

** Source: RA 2017 *face-to-face*; holiday trips 2016 (5+ days) to the Mediterranean in the respective form of holiday.



Segments in the summer: Hiking and Cycling



11 million

Hiking

- Attractive Landscape
- Gastronomy
- Good Trails
- Easy Access

27% high
29% middle
36% low
intensity



5 million

Cycling

- Attractive Landscape
- Gastronomy
- Variety of tours
- Good routes

37% high
29% middle
25% low
intensity



Segments in the winter: Interest in the Alps, in Active and Relax



14
million

Winter Alps

Snow
Cosy
Accommodation
Quiteness
in the Nature
Walking/Hiking
Gastronomy



7
million

Winter Active

Wintersports
Offer
Mountains
Attractivity
of the Ski Resorts



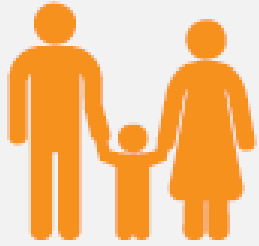
9
million

Winter Relax

Mountains
Landscape/
Nature
Fresh Air/
Healthy Climate

Winter holidays in the French mountains

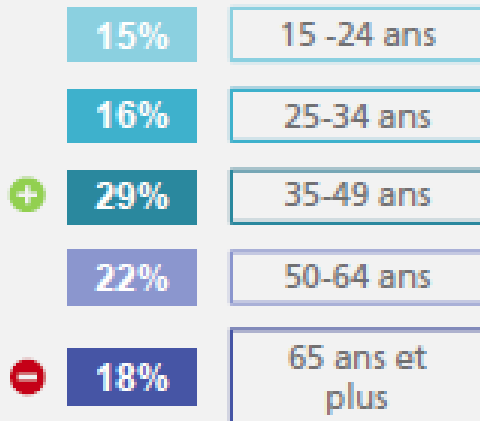
Présence d'enfants dans le ménage



+ 42%



Âge de l'individu

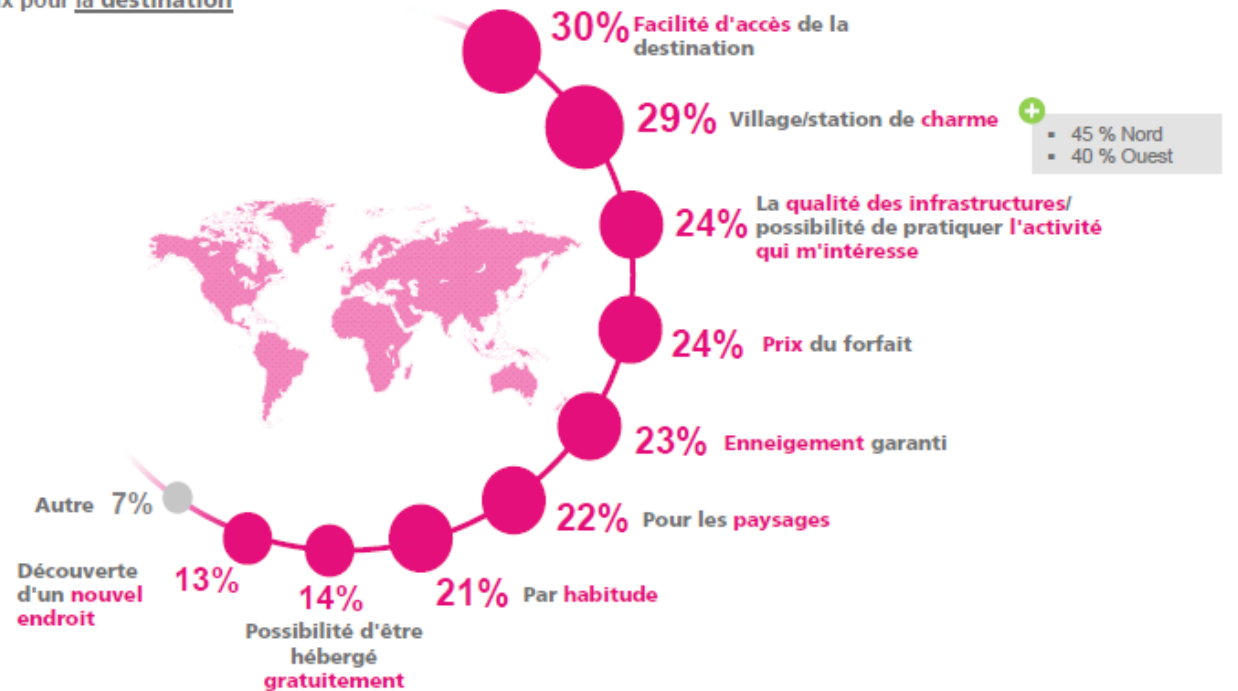


Des critères de choix assez partagés pour la destination : la facilité d'accès et le charme du village/de la station arrivent toutefois en tête

Critères de choix pour la destination



11% n'ont pas le choix de la destination



Base : sont allés à la montagne au moins une fois au cours des trois dernières périodes hivernales (1 232 panélistes).

Question : quels sont vos principaux critères pour choisir votre destination à la montagne lorsque vous vous y rendez en période hivernale (décembre à avril) ?

+ significativement supérieur au total

Winter holidays in the French mountains



Top 3 des activités pratiquées (tous types d'activité confondus)

- Activités de sport d'hiver
- Autres activités sportives
- Activités de bien-être, détente

59%
Ski (de fond, de descente, *snowboard*)

- + 75 % 15-24 ans
- 78 % Cadres

64%
Randonnée à pied

- + 76 % Sud-Est
- 75 % 50 ans et plus
- 74 % Inactifs

47%
Luge

- + 63 % 25-49 ans
- 57 % Professions intermédiaires
- 58 % Ouvriers



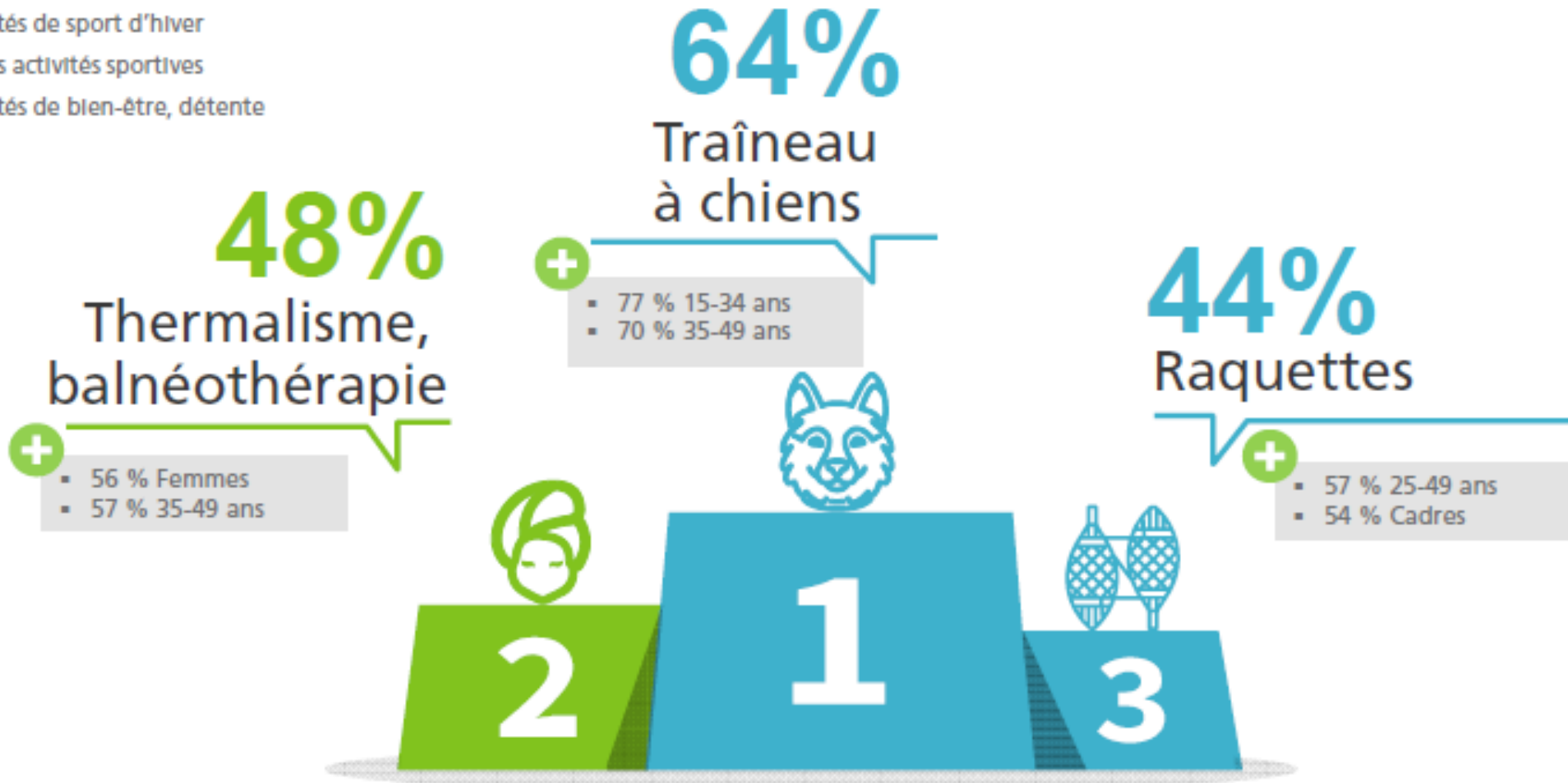
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Winter holidays in the French mountains



Top 3 des activités recherchées (tous types d'activité confondus)

- Activités de sport d'hiver
- Autres activités sportives
- Activités de bien-être, détente



Base : sont allés à la montagne au moins une fois au cours des trois dernières périodes hivernales (1 232 panélistes).

What do we learn for the Catalan Pyrenees?



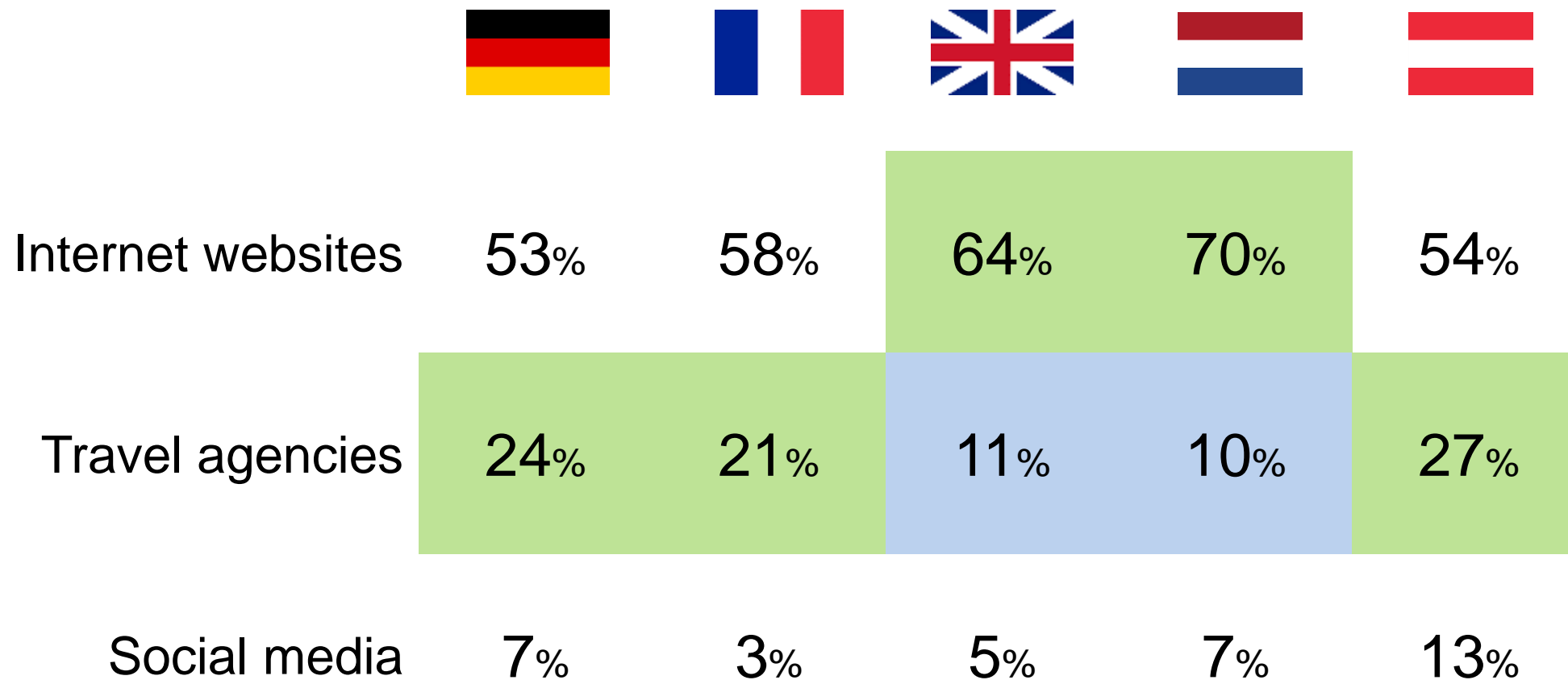
- German potential NATURE travellers to Catalunya are much more into nature, activity and also culture than the average potential traveller to Catalunya.
- Cyclists and Hikers want to experience the landscape and the gastronomy
A lot of them are not “high intensity” active
- For winter mountain guests the snow is crucial –
For active travellers its about skiing and skiing infrastructure,
For relaxing travellers about being outdoors in the mountain landscape
- In France, we only have information available for domestic mountain holidays in the winter:
Compared to Germany, we find more families and see what is crucial for them in the decision process.
- Regarding activities it is not only skiing but hiking and “new” activities are also attractive.

→ There are interesting segments for mountain holidays in both markets

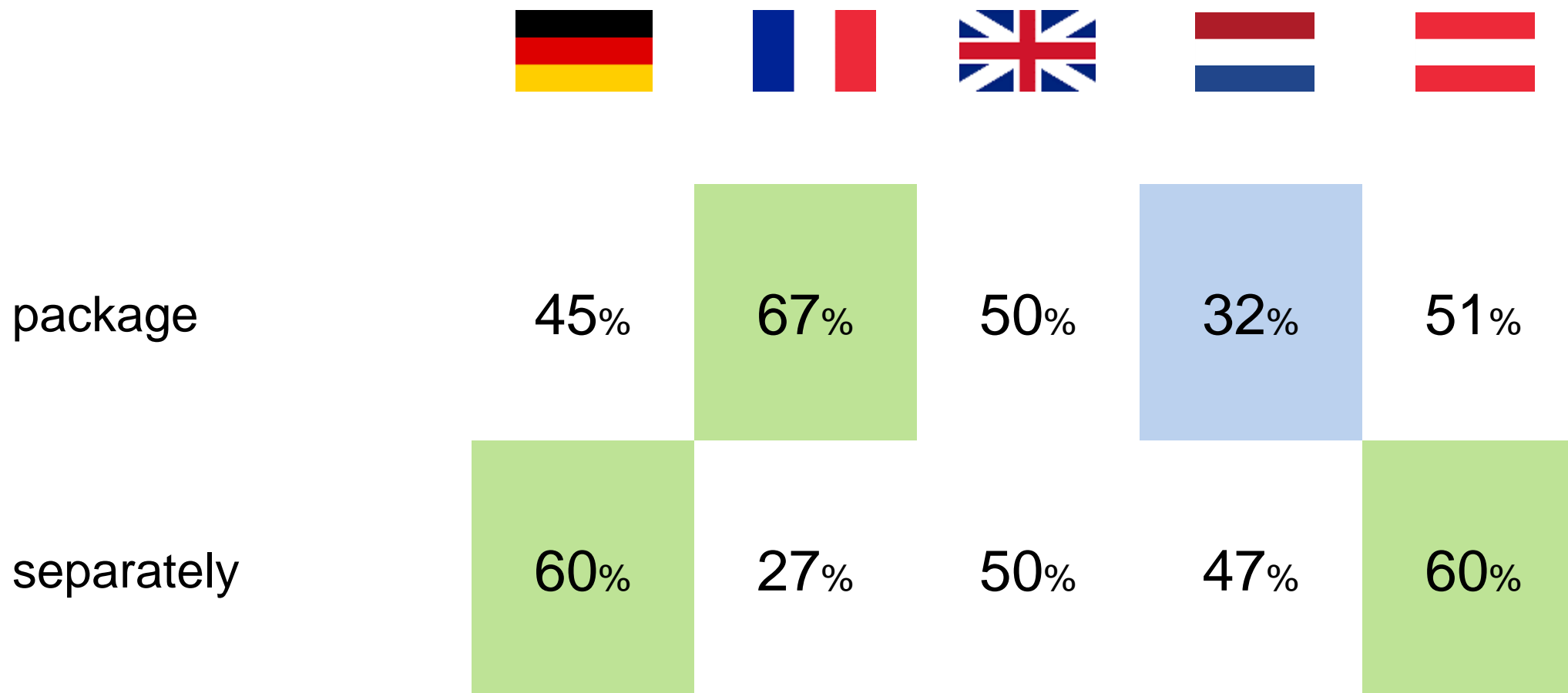
→ You need to focus on the segments that you like to attract

→ To reach them becomes harder and needs to be done cooperatively
(Companies, DMOs, DMCs etc.)

Selected sources of information for holiday planning

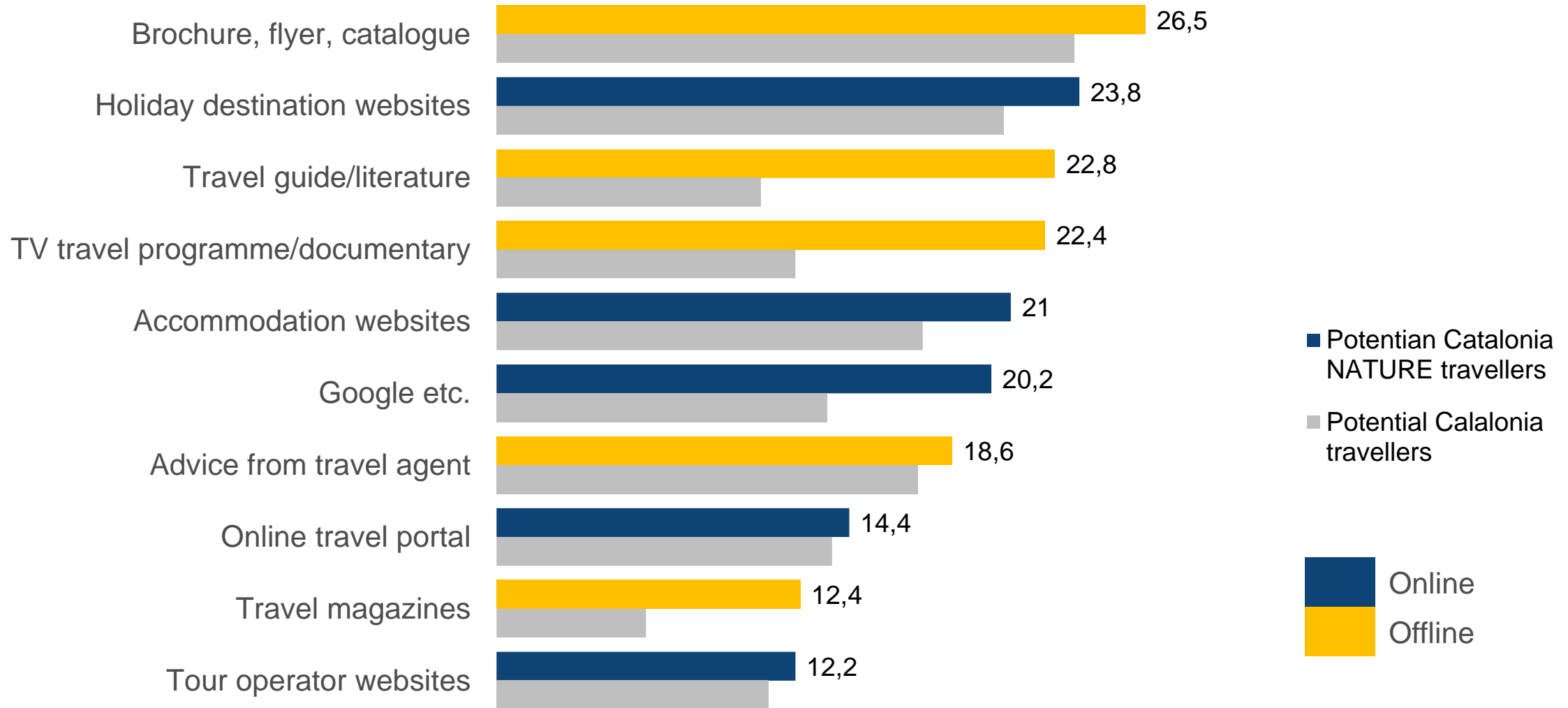


Organisation of holiday trips



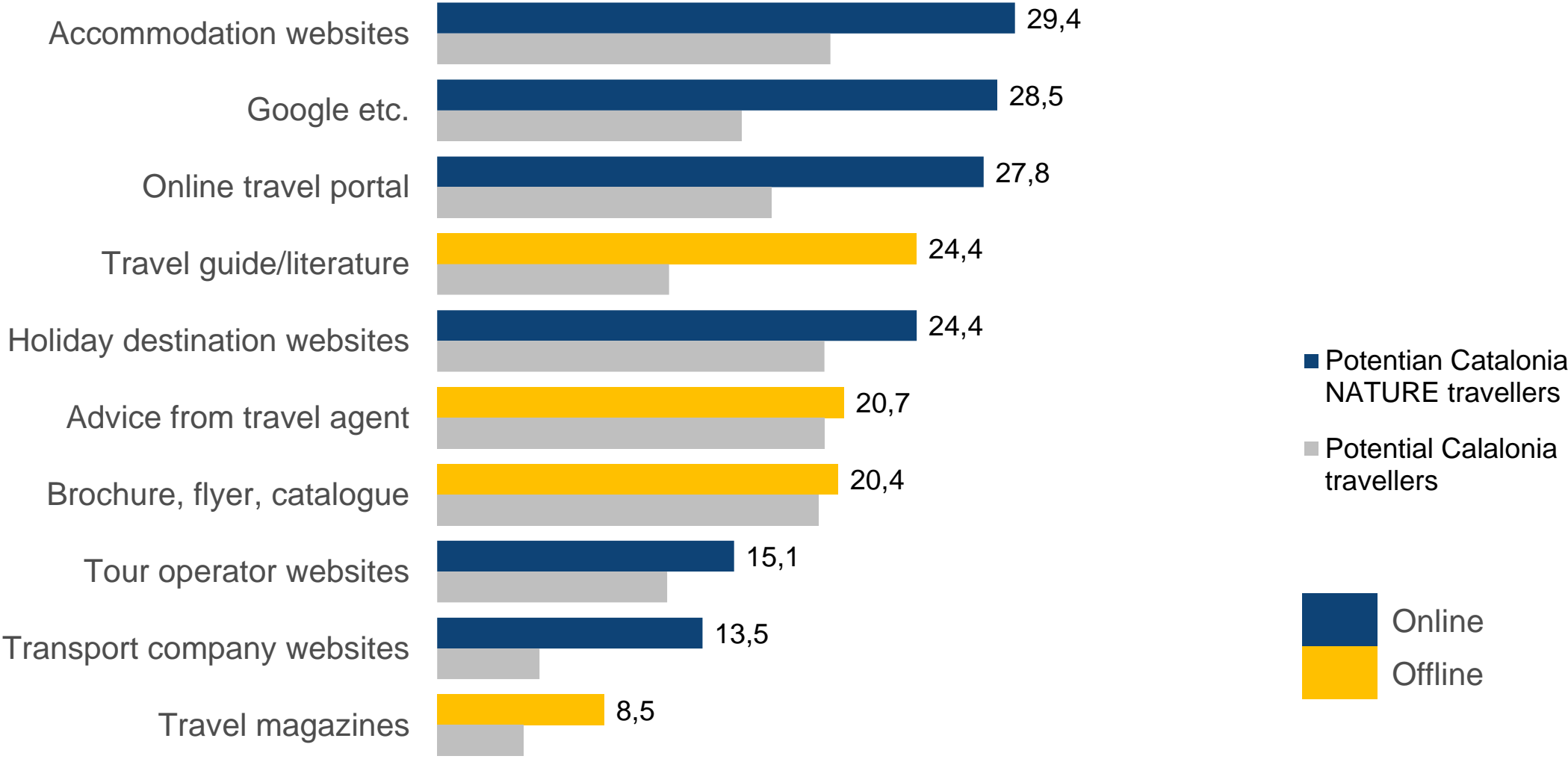


Online-/offline media for holiday inspiration of the potential Catalonia NATURE travellers





Online-/offline media for holiday information of the potential Catalonia NATURE travellers



What do we learn for the Catalan Pyrenees?



- Both Germany and France are not as online dominated as other markets. Travel agents still play an important role as a source of information.
 - The French prefer package travel – even more than the Germans
 - For Germany we have differentiated data about inspiration and information sources.
- You need a market and segment specific marketing mix
- You still have to use also “old” information tools
- For the nature travellers in Germany you need another media mix to attract them than for all potential travellers to Catalunya



Hiking Europe Project

**A PUBLIC-PRIVATE COOPERATION EFFORT SUPPORTED BY THE
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COWO Tirol

Höchster Coworking Space der Alpen
am Patscherkofel auf 1.963 m



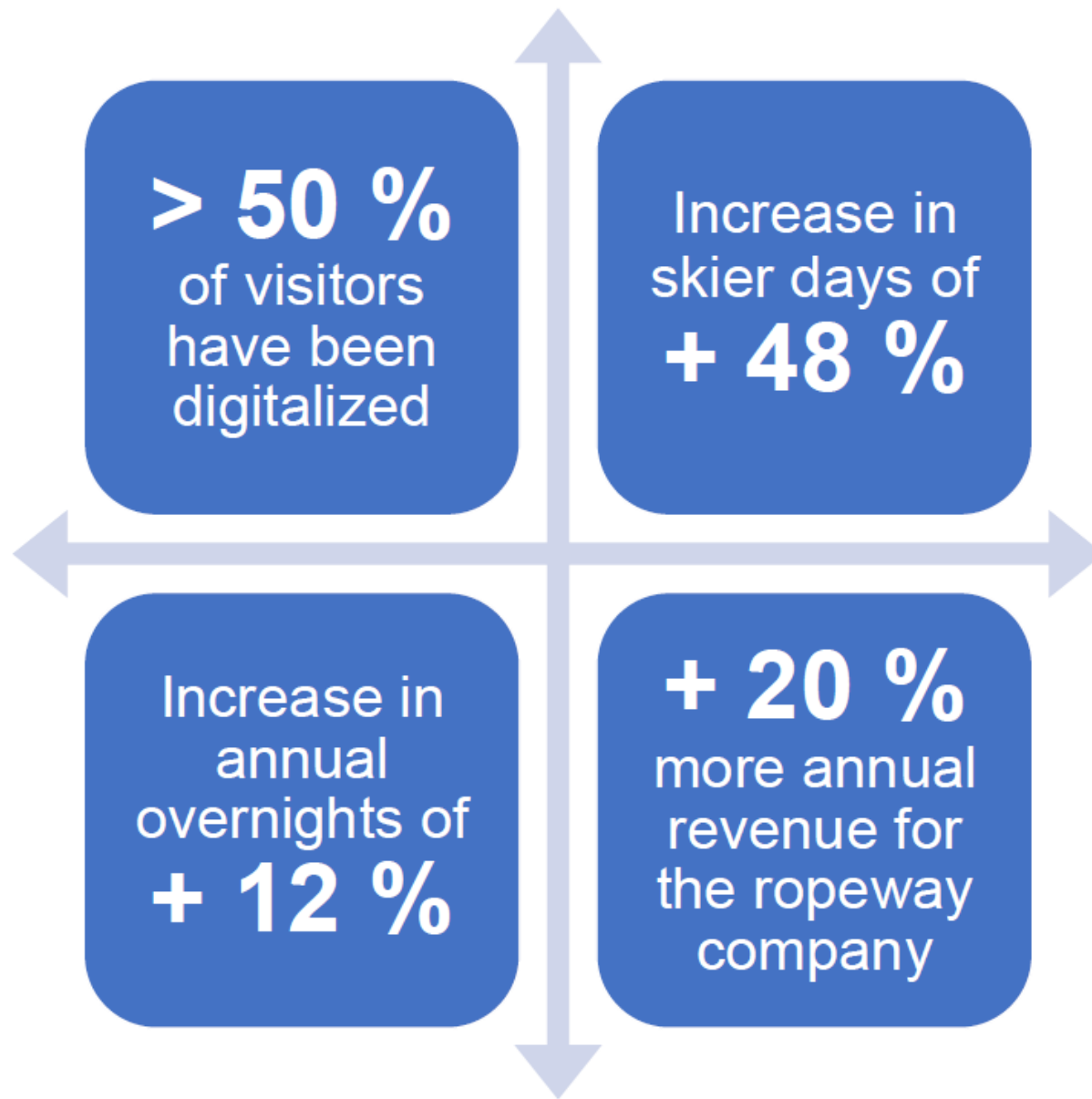


FREEDOM X FEST

The first outdoor festival on the
location independence movement

Pyrenees, Spain
August 11-15

REGISTER





Thank you!

Data sources



- UNWTO:
<http://www2.unwto.org/press-release/2017-01-17/sustained-growth-international-tourism-despite-challenges>
- IPK:
http://www.itb-berlin.de/media/itb/itb_dl_all/itb_presse_all/World_Travel_Trends_Report_2016_2017.pdf
- Vanat 2017 International Report on Snow and Mountain Tourism:
<http://vanat.ch/RM-world-report-2017-vanat.pdf>
- GfK:
<http://www.gfk.com/global-studies/global-studies-vacation-type/>
- EU COMMISSION:
http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item_id=8833&lang=en
- GREENLAND:
http://www.northatlantic-islands.com/fileadmin/documents/NIT_NATA_Report_DE2016_final.pdf
- REISEANALYSE:
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