



Grow or Die?

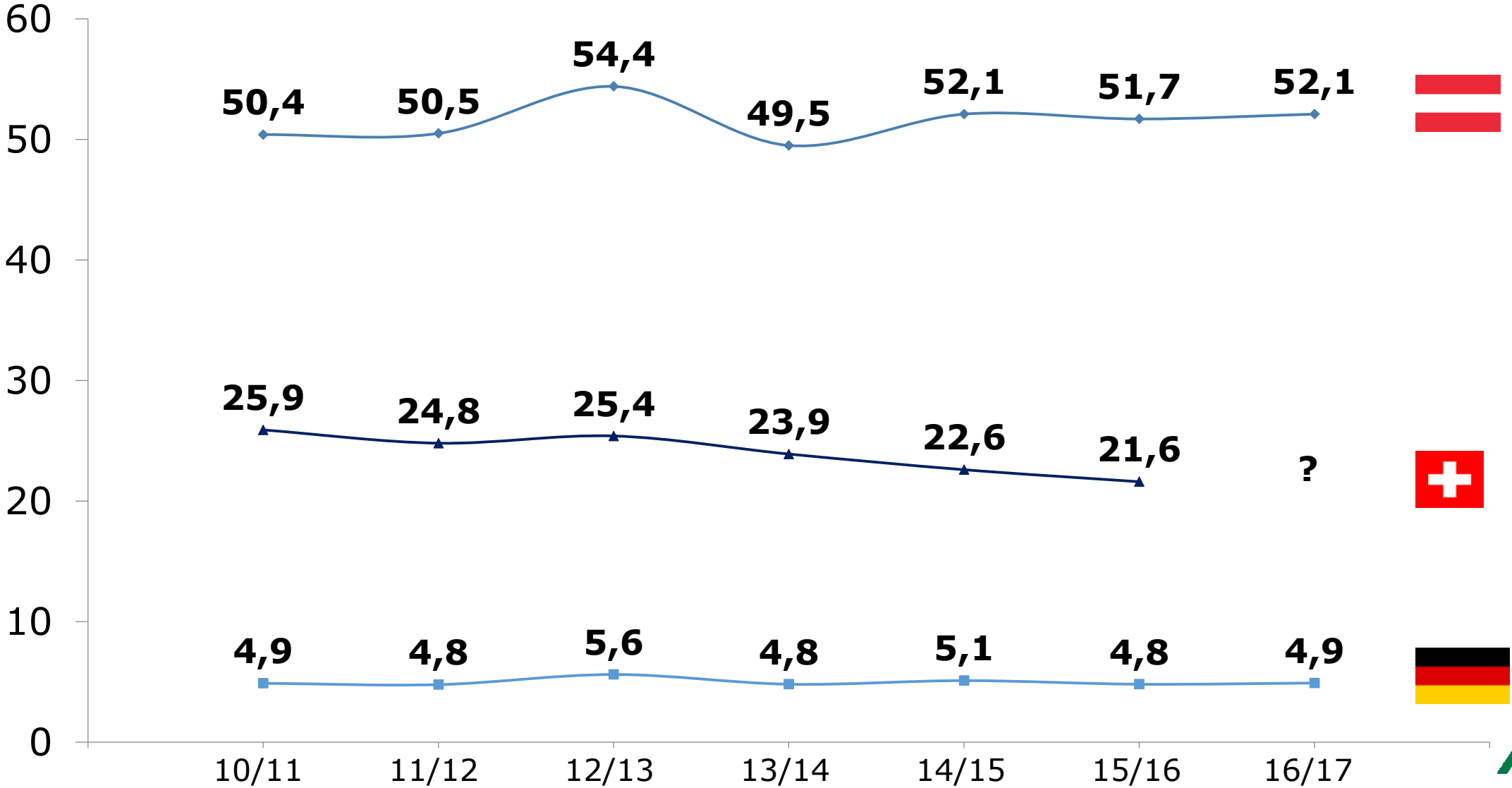
The growth challenge for Europe's ski slopes

Klaus Grabler

THE ANALYSIS



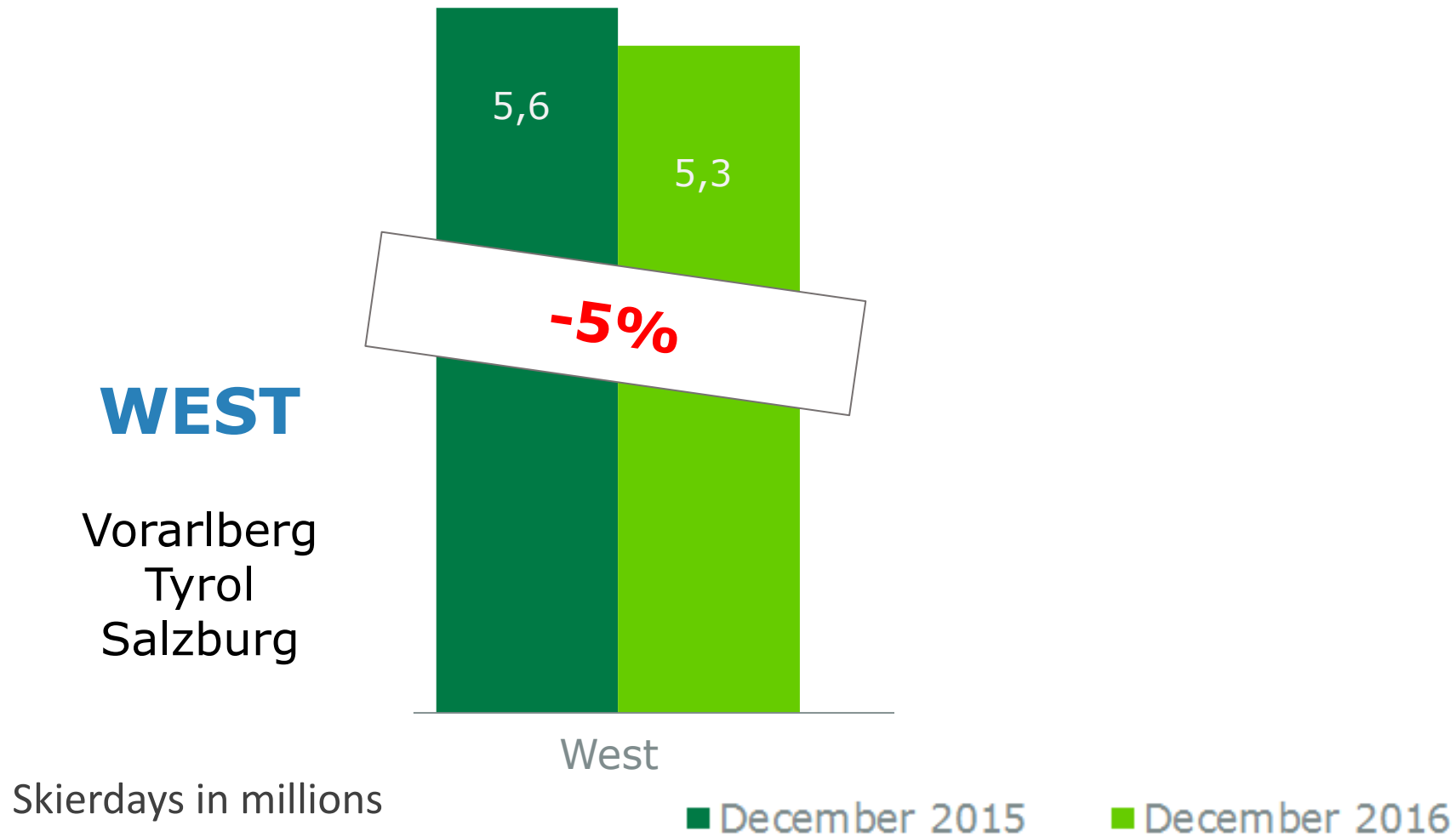
Skierdays in millions



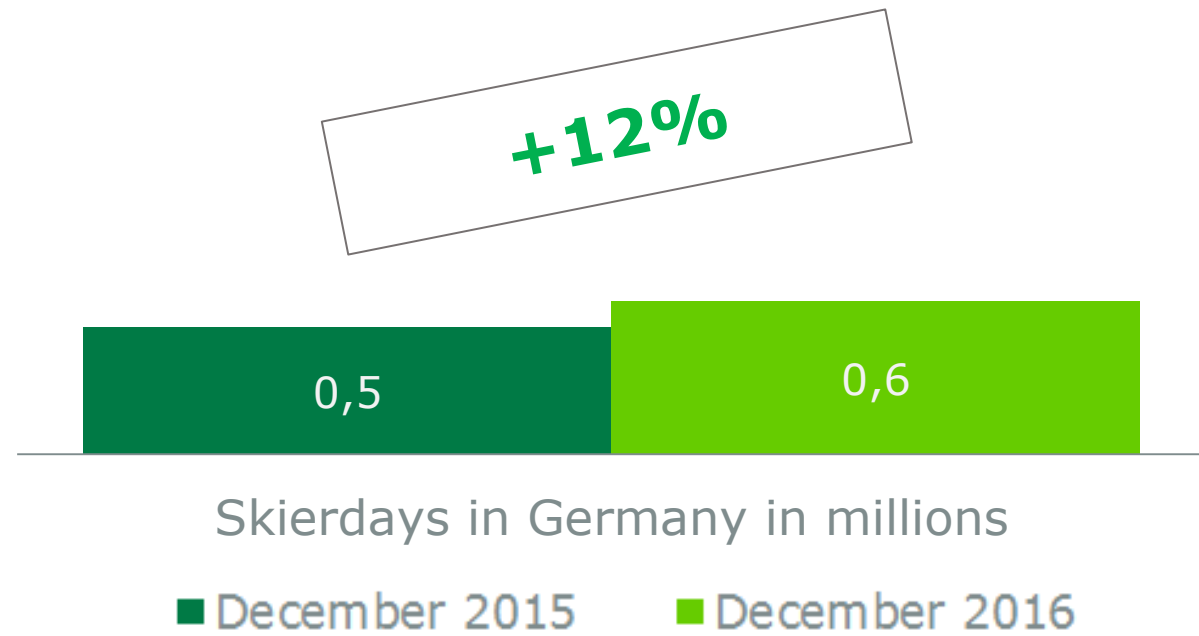


Analysis of latest winter in Austria:

When there are losers...

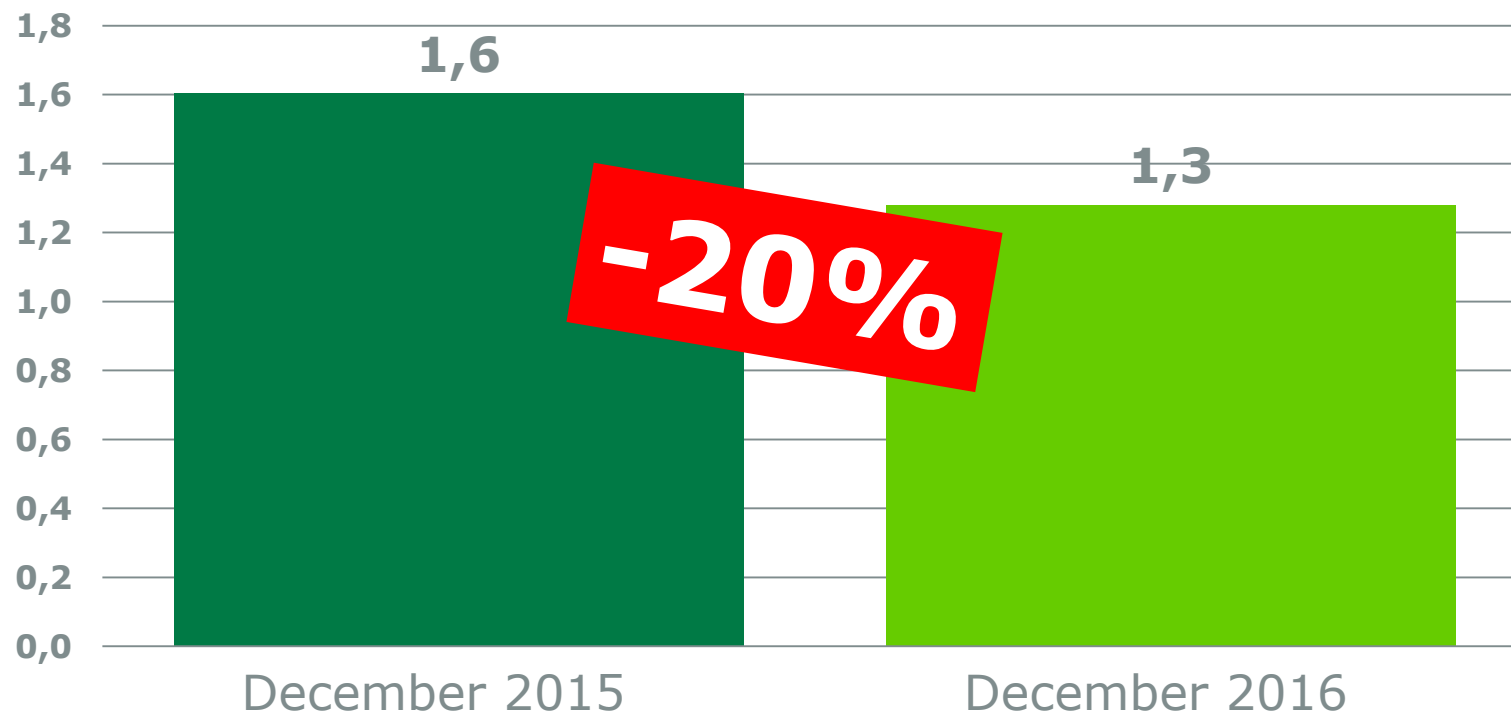


...in other regions



A lot of winter sportsmen from the northern part of Germany spent the Christmas holidays on the local slopes rather than taking the long journey to Austria

Overnight stays from North Rhine-Westphalia, North or East Germany in December in million



THE INSIGHTS

People do not SKI **LESS**

just **SOMEWHERE ELSE**



a lot of

COMPETITION

around skiers



Population 14 to 70 years
in the D-A-CH area

~58.4 million

Skiers

33%
(~19.4 million)

Non skiers

67%
(~39 million)

Winter sports fans

18%
(~10.5 million)

Quitters

17%
(~10 million)

Occasional skiers

10%
(~5.7 million)

Holdouts

50%
(~29 million)

Inactives

6%
(~3.2 million)

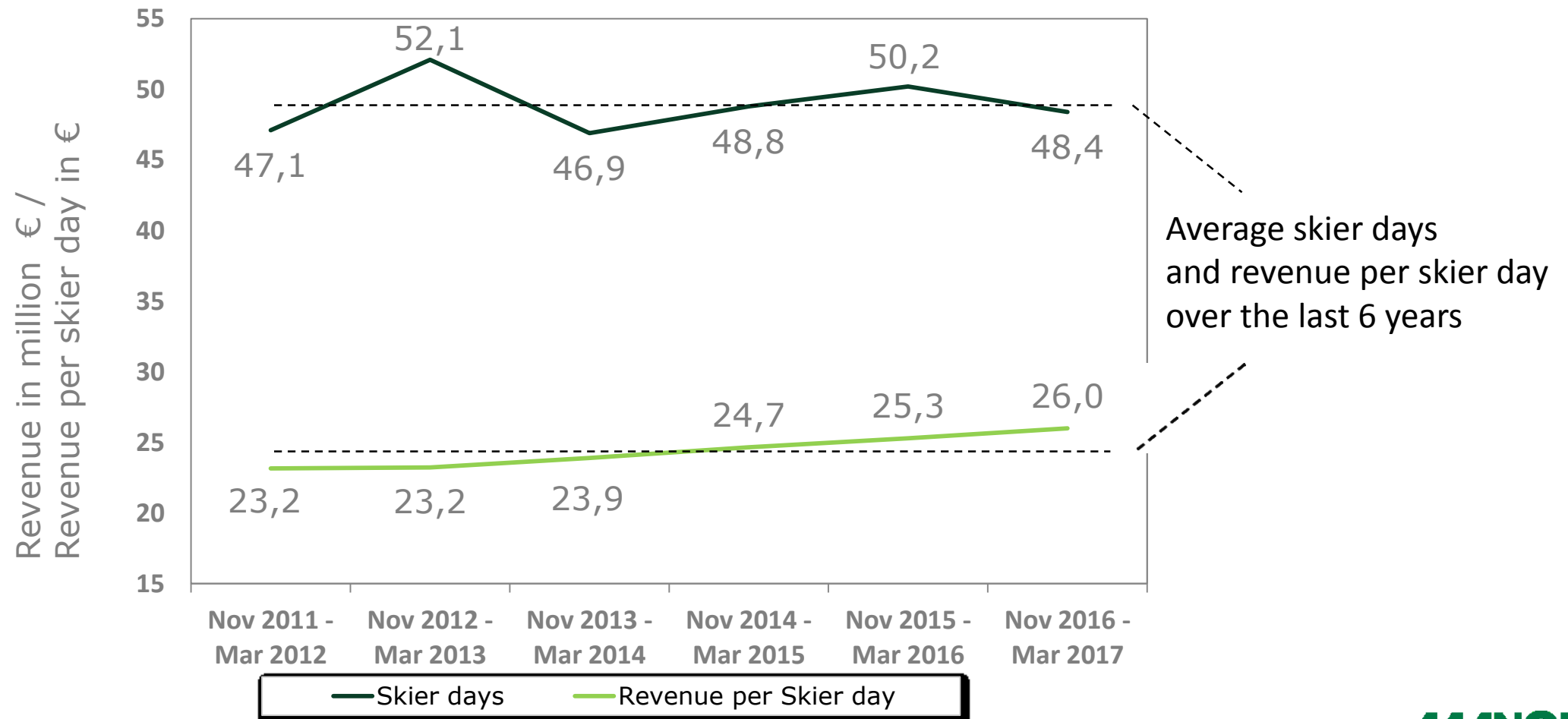
BAD NEWS

or

GOOD NEWS



Despite continually increasing expenditures per skier day, the number of skier days remains constant



Average spendings per Skierday

2008/2009

2012/2013

2015/16

104 €

127 €

152 €





Actually

GOOD NEWS

Because we keep the **DEMAND**
despite **RISING PRICES**

BUT

The **COMPETITION BATTLE**
is won by **INVESTING**

... which leads to higher prices

HIGHER PRICES

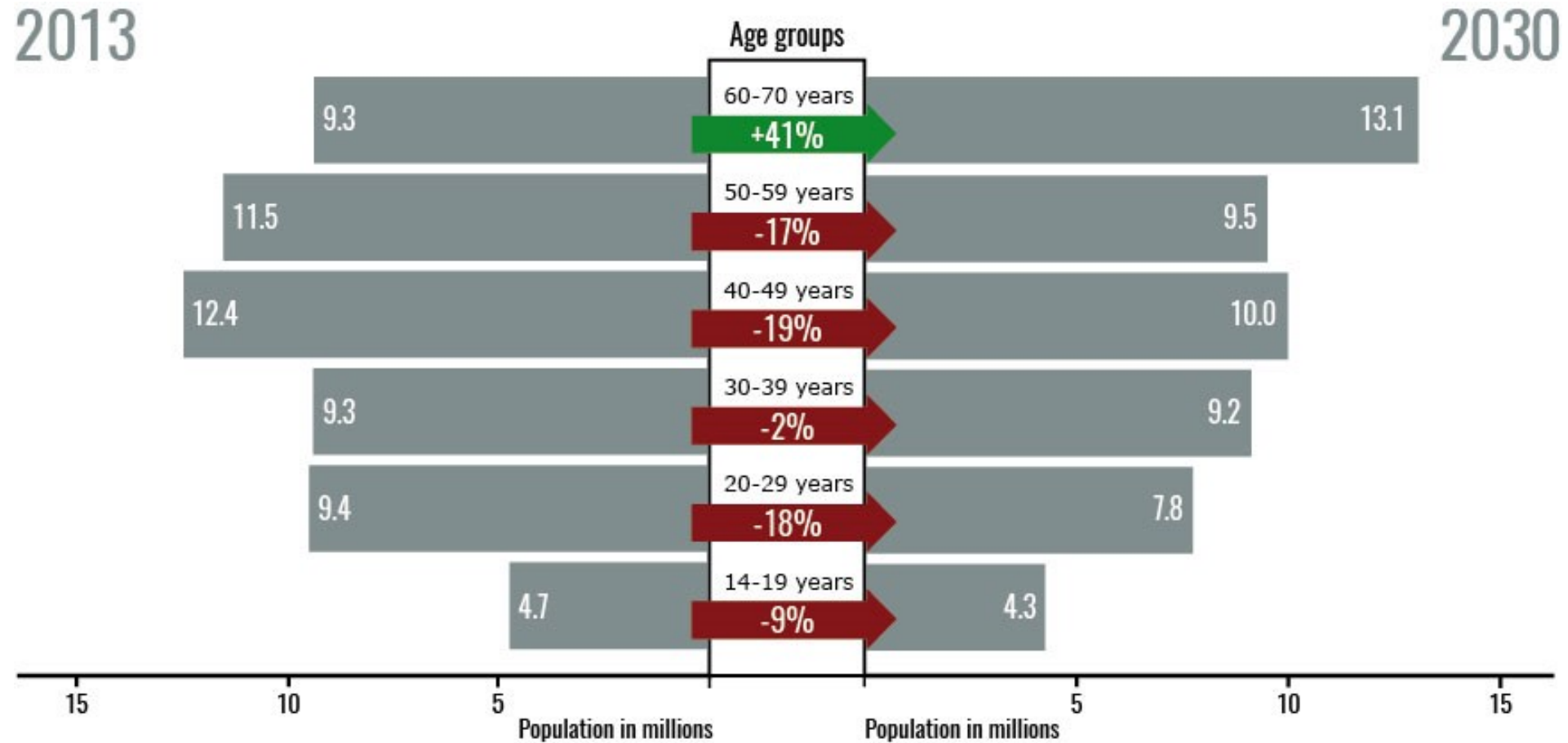


...prevent **interested persons** from starting

...prevent **skiers** from skiing more

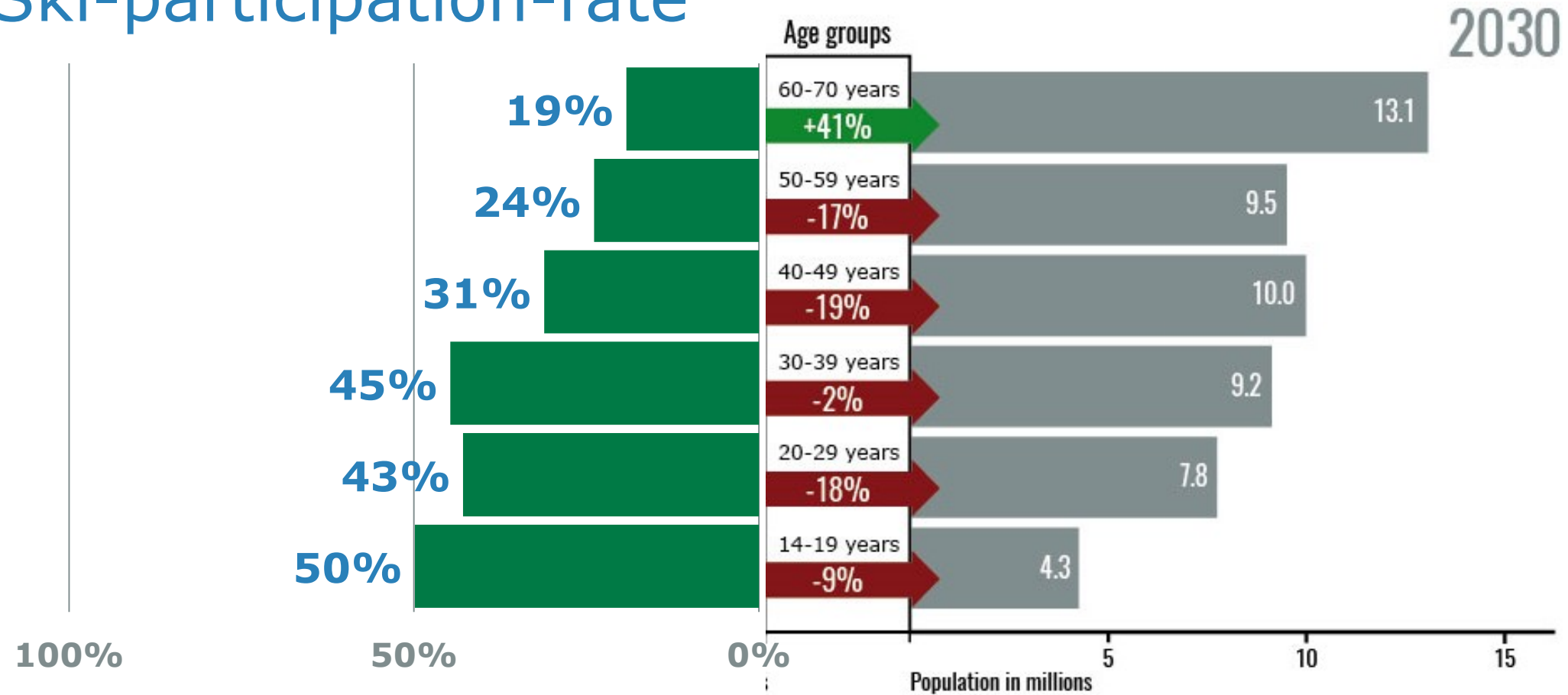
...prevent **quitters** from continuing to ski

If this is not challenge enough...



Surely this is...

Ski-participation-rate



If we don't want
ski resorts to
die,

we need
more

WINTER SPORTS FANS

If we don't want
ski resorts to
die,

OKAY

we need
more

BUT HOW?

WE NEED MORE SPORTS FANS

5 APPROACHES FOR GROWTH



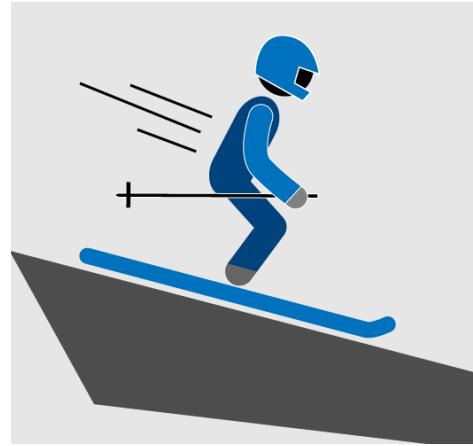
1

Increase
interest



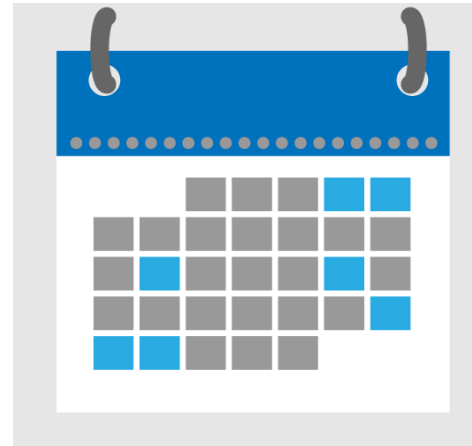
2

Bring prospective
skiers to **begin**



3

Hold onto
beginners



4

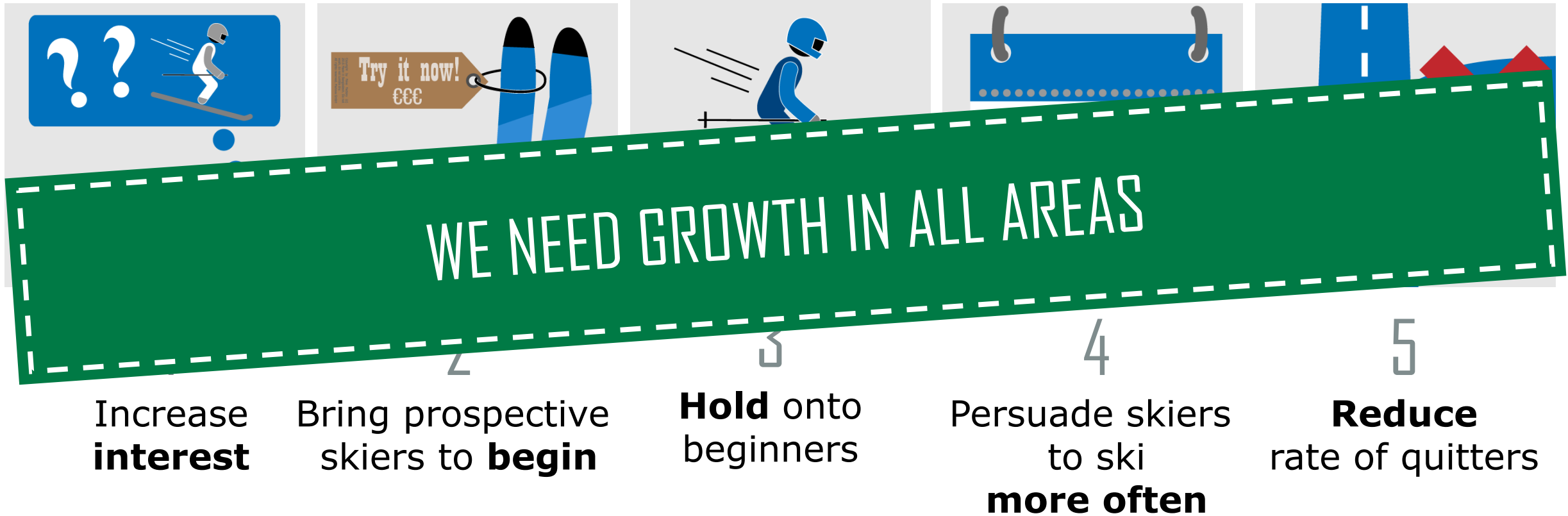
Persuade skiers
to ski
more often



5

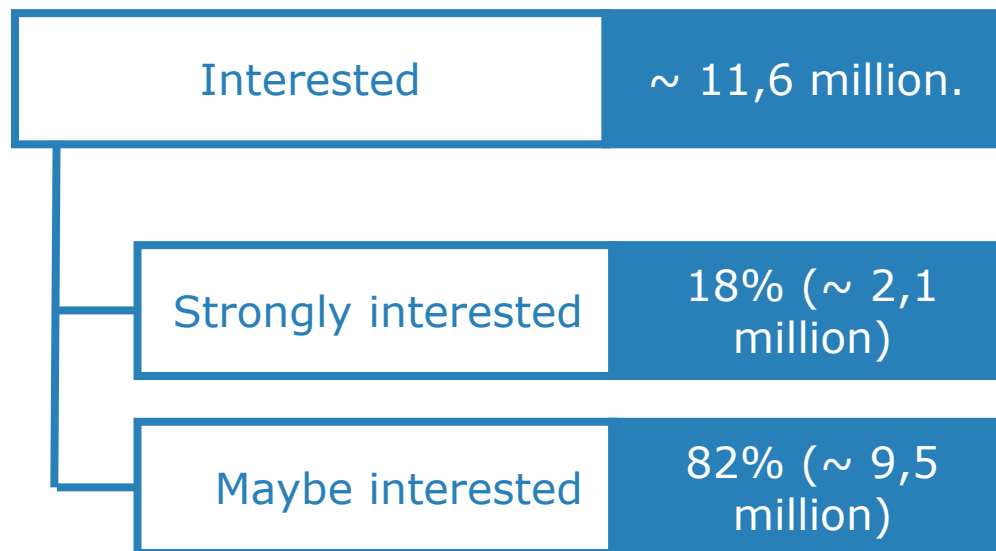
Reduce
rate of quitters

5 APPROACHES FOR GROWTH





↑
Increase
interest



About **2,1 million** are **certainly** interested in **beginning** or **going back to** skiing



Increase
interest

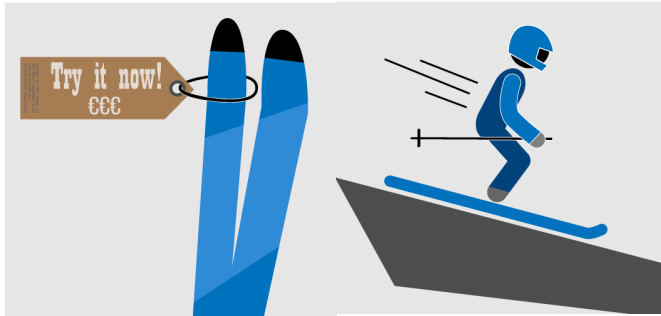
**Bring snow and mountains closer
to urban areas**

Low-priced tryouts

**Proper advertising (women –
recreation)**

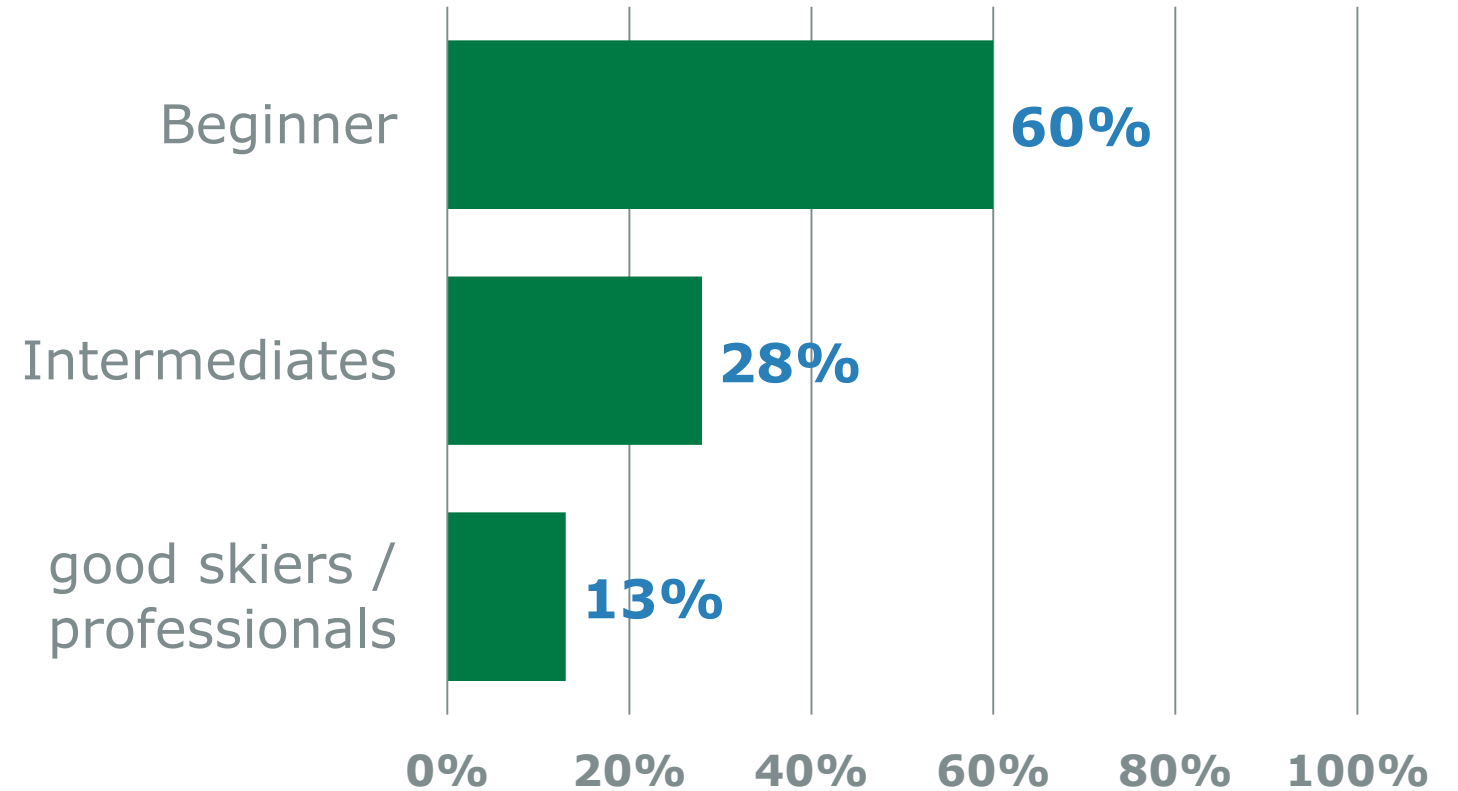
Don't forget about older folks

Many people quit at the BEGINNING

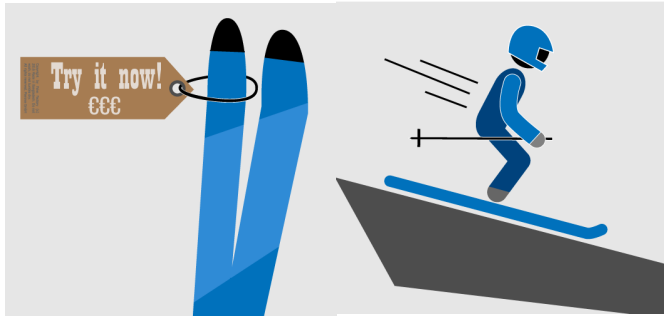


2+3

Conversion of
beginners



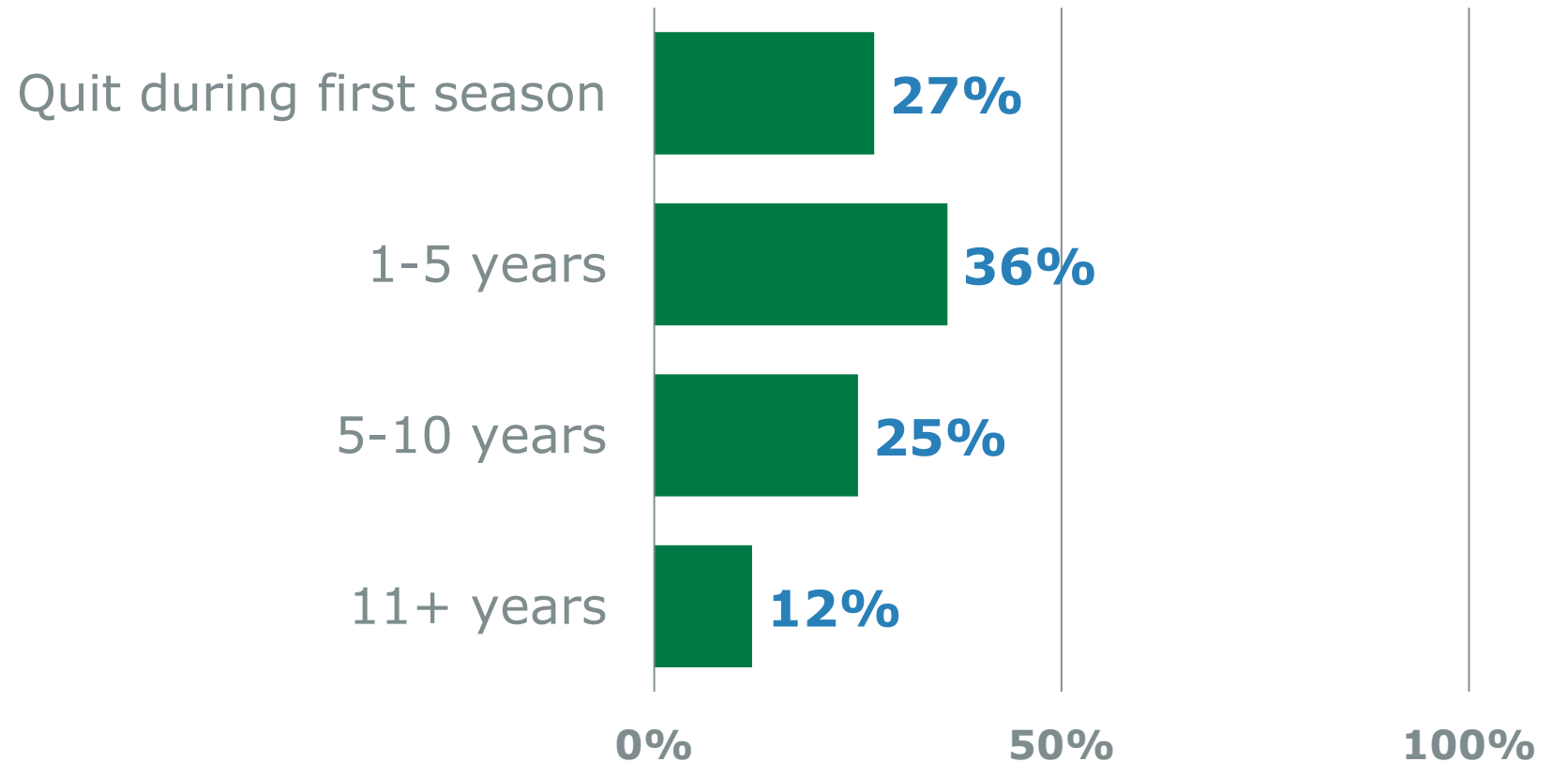
Many people quit at the BEGINNING

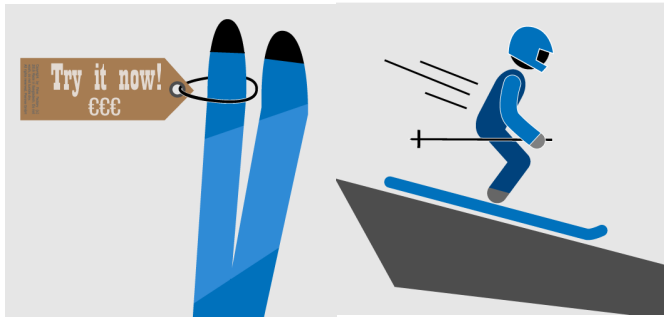


2+3

Conversion of
beginners

Duration of career at time of quitting for lack of skill

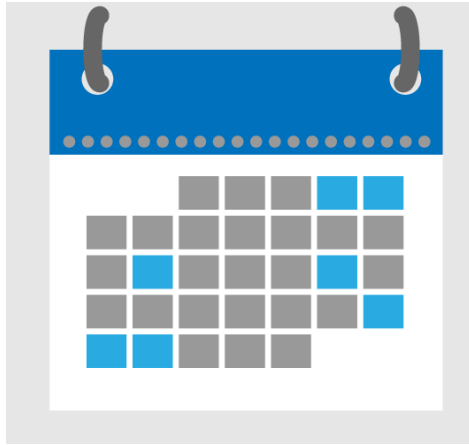




2+3

Conversion of
beginners

Ski schools are very important
Communicate achievements
and/or make them possible

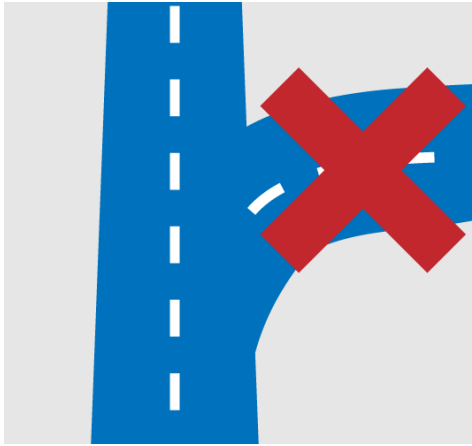


4

Persuade skiers
to ski
more often

Professionalize Marketing and CRM

Many do not even know their customer's addresses

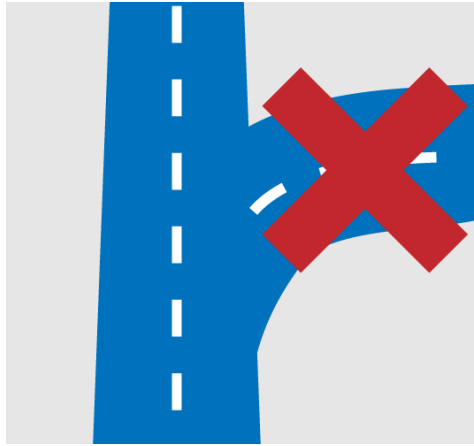


5

Reduce
rate of quitters

Reasons for quitting:

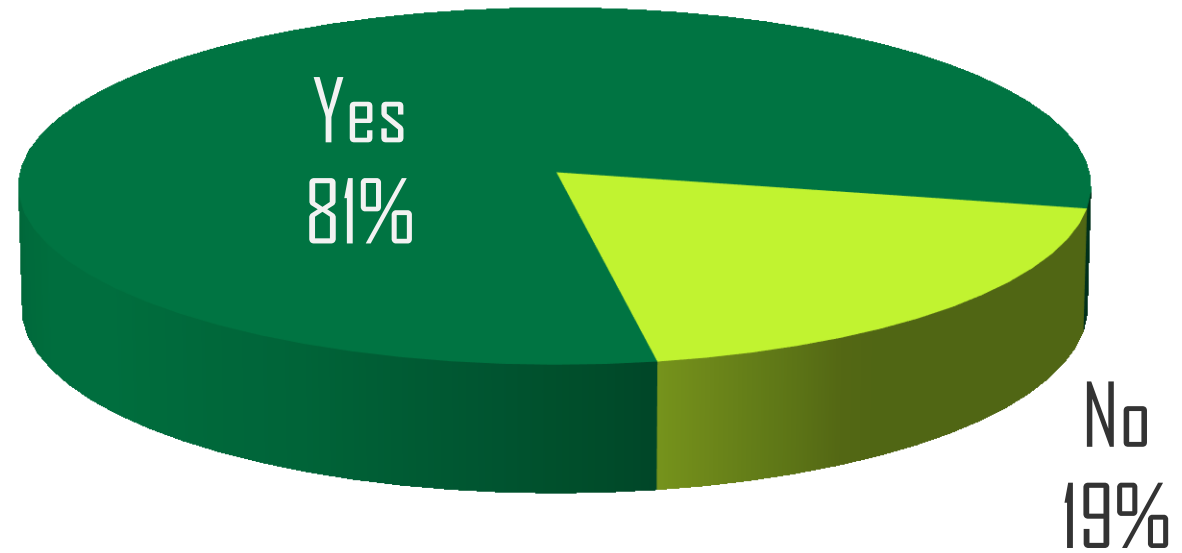
Overall too expensive	33%
For health reasons	31%
Equipment too expensive	22%

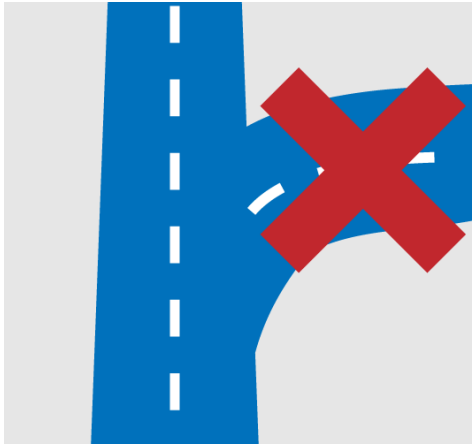


5

Reduce
rate of quitters

Did you ski every day?

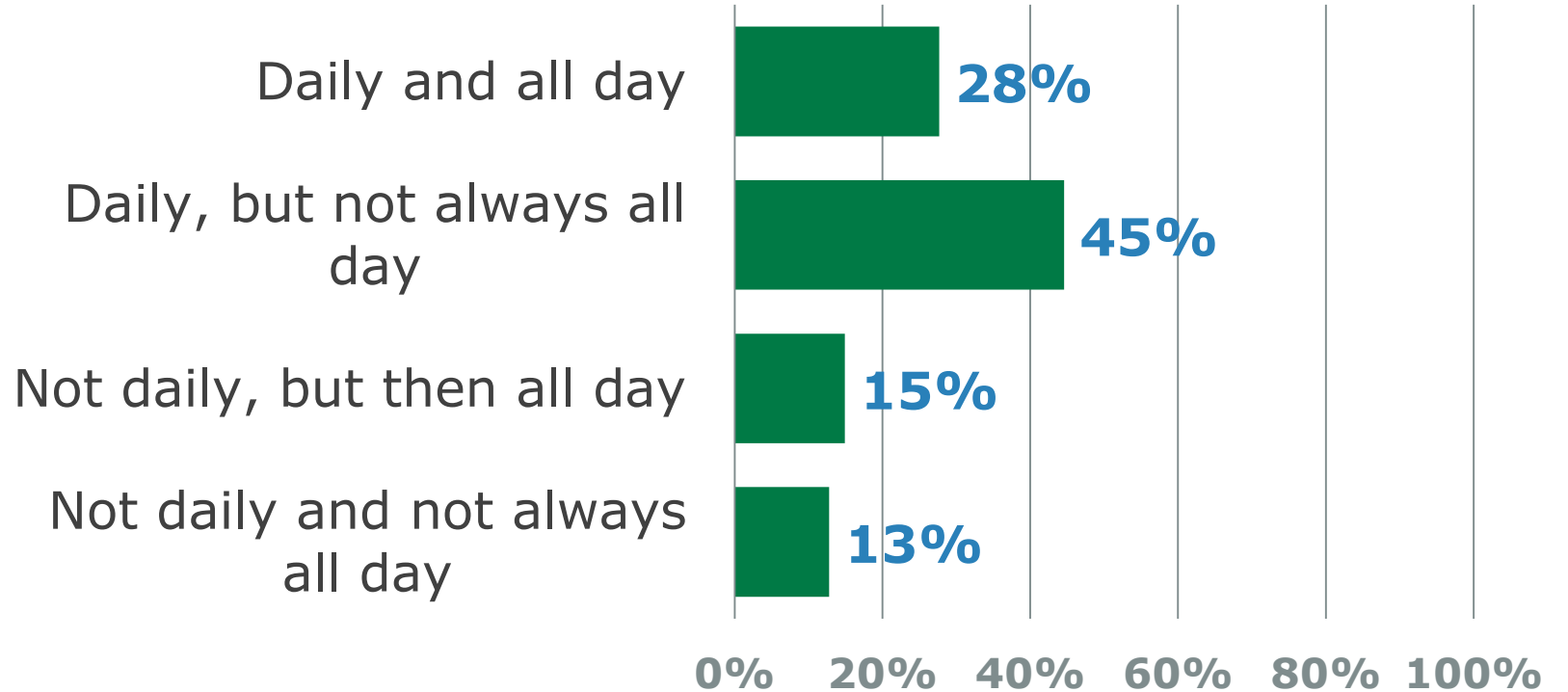




5

Reduce
rate of quitters

In your ideal vacation,
how often do you want to ski?





5

Reduce
rate of quitters

Product development necessary

Recreation

Flexibility

Price fairness

5 APPROACHES FOR GROWTH



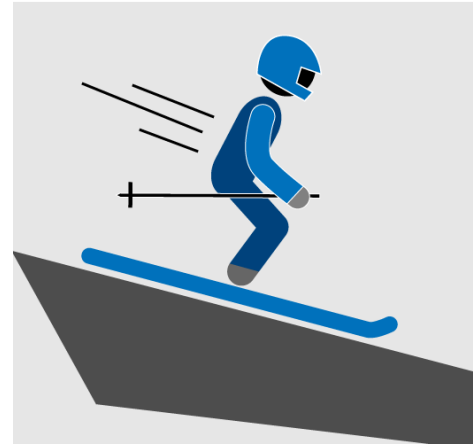
1

Increase
interest



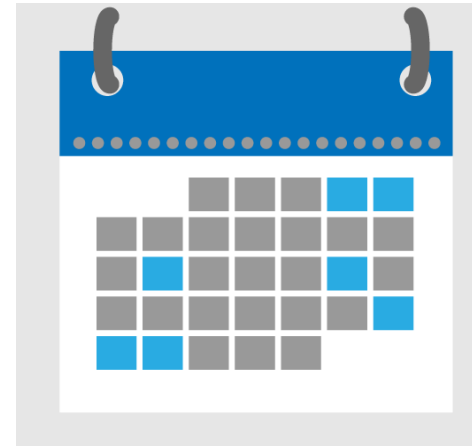
2

Bring prospective
skiers to **begin**



3

Hold onto
beginners



4

Persuade skiers
to ski
more often



5

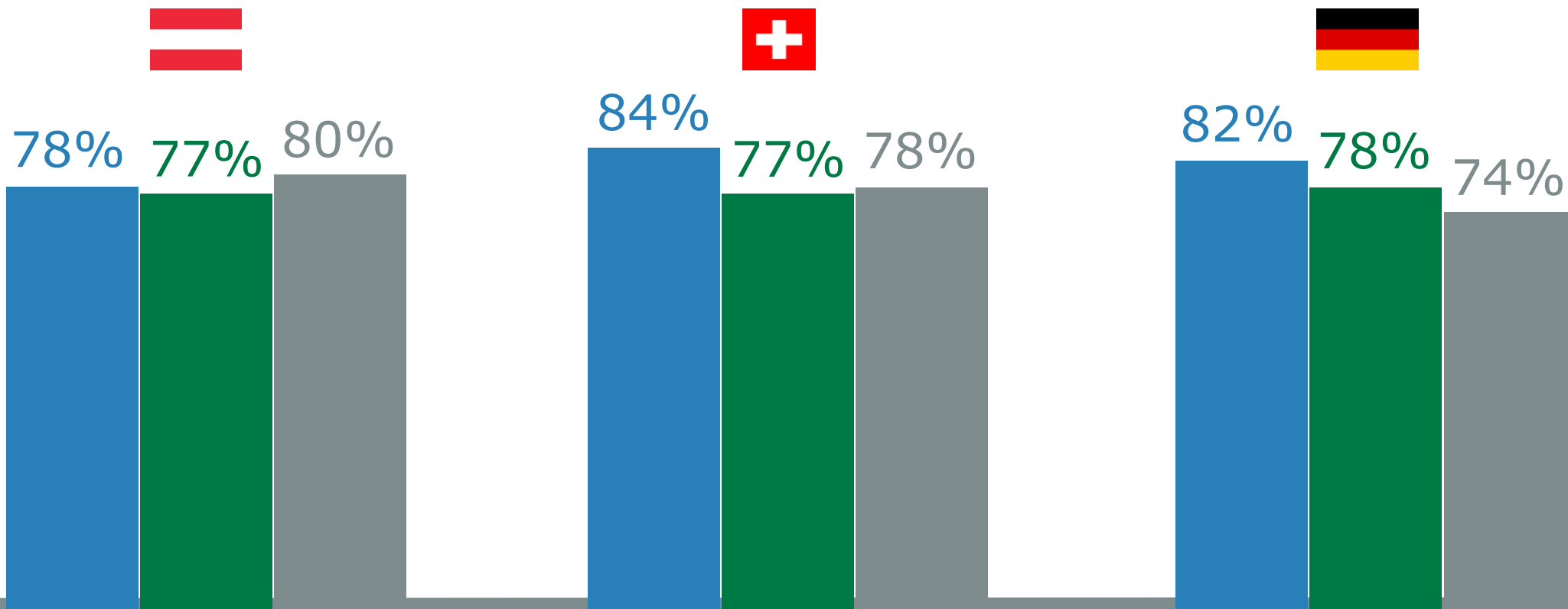
Reduce
rate of quitters

And by the way...

Skiing/snowboarding is cool!

Cablecars increase the fun-factor!

Cablecars contribute to economic welfare!





Klaus Grabler
CEO

T +43 1 710 75 35 - 0

E klaus.grabler@manova.at

References:

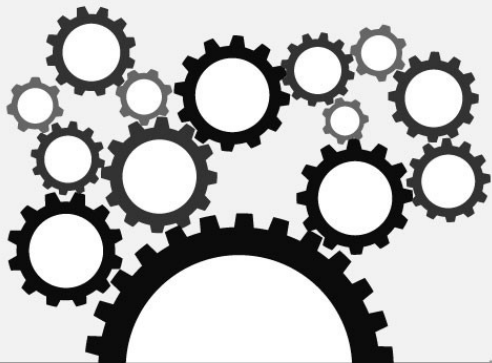
Unless otherwise noted all figures from:
Skipotential 2016 (MANOVA GmbH) n=4.406

Daten | **l**eben lernen | Learn to **l**ove data

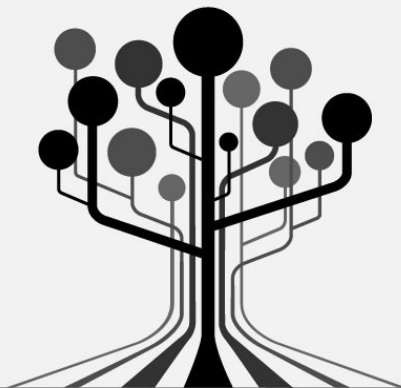


Wipplingerstraße 23/23
1010 Wien
Austria

T +43 1 710 75 35 – 1 | F – 20
office@manova.at
www.manova.at



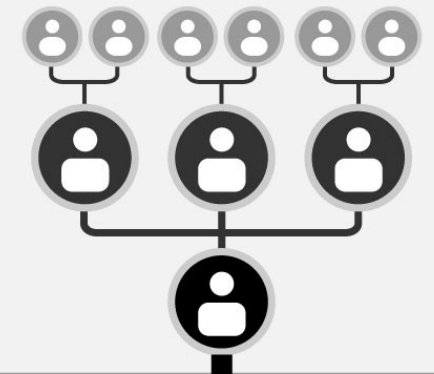
PROFESSIONAL EXPERTISE



INDUSTRY EXPERTISE



IT EXPERTISE



KNOWLEDGE TRANSFER

www.**MANOVA**.at

All contents, in particular texts, models, data, evaluations and graphics, are copyrighted as intellectual property. Any further use also in parts (if permitted) may be made only with explicit source references.

MANOVA