



Holidays in the mountains - future trends

Ulf Sonntag, NIT

Bozen/Bolzano 6 - 9 June 2017

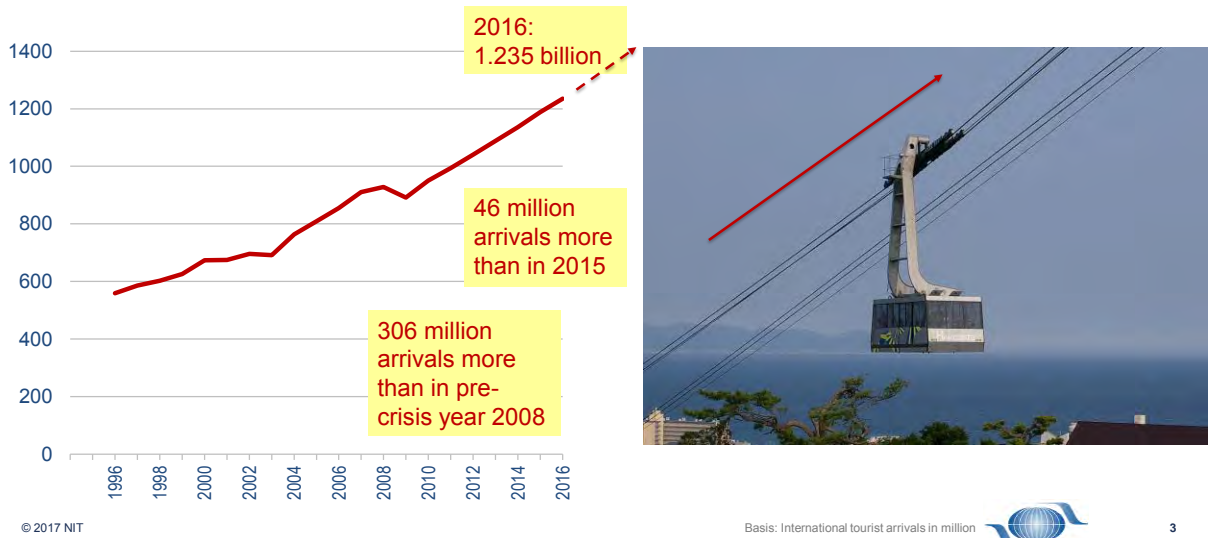
Ulf Sonntag is head of market research and associate director at NIT, Institute of Tourism Research in Northern Europe (www.nit-kiel.de). He studied Geography, Political Science and Business Administration at the University of Bonn, with international semesters in the USA and Switzerland. The general focus of Ulf's work is understanding the dynamics of tourism on regional, national and international level based on statistical analyses and market research, as well as the application and discussion of findings in policy, planning and marketing. Ulf is project manager of the German Reiseanalyse (www.reiseanalyse.de), and in this position provider and advisor for European destinations and tour operators concerning tourism demand data.



Global trends in tourism flows
Relevant segments for mountain holidays
in different markets
Trends for mountain holidays
on the German market
Winter and summer holidays in the Alps
Segments for mountain holidays in Germany

After a short look at the global travel volumes and trends, the presentation will explain travel behavior, desires and needs of international tourists from major markets – with a deeper look into the Alps and the German travellers. It will conclude with implications and trends for mountain holidays and ropeway transportation.

Global tourism flows: Number of international arrivals is continuously growing



Relevant for the ropeways:

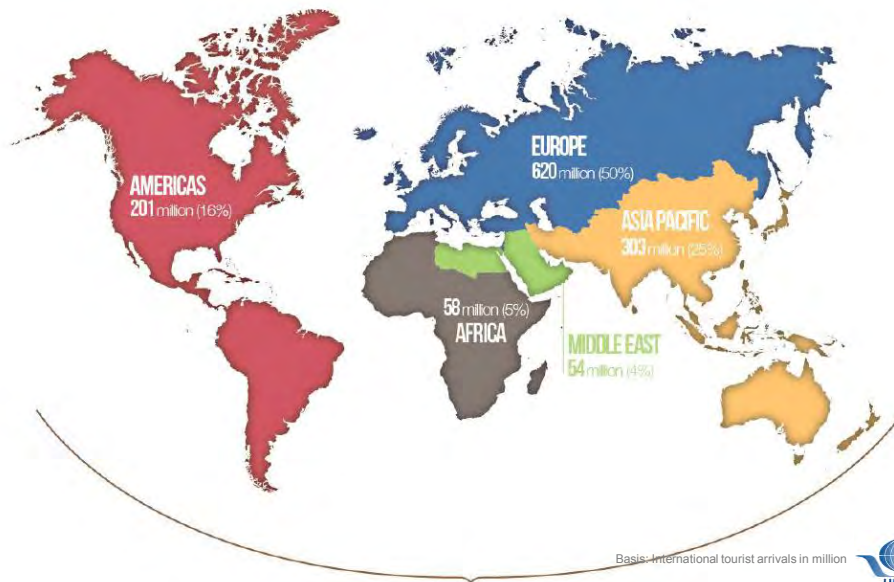
Tourism in general is doing very well. The outlook for the foreseeable future is very good!

Detailed background information:

Demand for international tourism remained robust in 2016 despite challenges. International tourist arrivals grew by 3.9% to reach a total of 1,235 million, according to the latest UNWTO World Tourism Barometer. Some 46 million more tourists (overnight visitors) travelled internationally last year compared to 2015.

2016 was the seventh consecutive year of sustained growth following the 2009 global economic and financial crisis. A comparable sequence of uninterrupted solid growth has not been recorded since the 1960s. As a result, 300 million more international tourists travelled the world in 2016 as compared to the pre-crisis record in 2008. Based on current trends, the outlook of the UNWTO Panel of Experts and economic prospects, UNWTO projects international tourist arrivals worldwide to grow at a rate of 3% to 4% in 2017. Europe is expected to grow at 2% to 3%, Asia and the Pacific and Africa both at 5% to 6%, the Americas at 4% to 5% and the Middle East at 2% to 5%, given the higher volatility in the region.

International arrivals 2016: Breakdown by continents Europe is by far the biggest destination



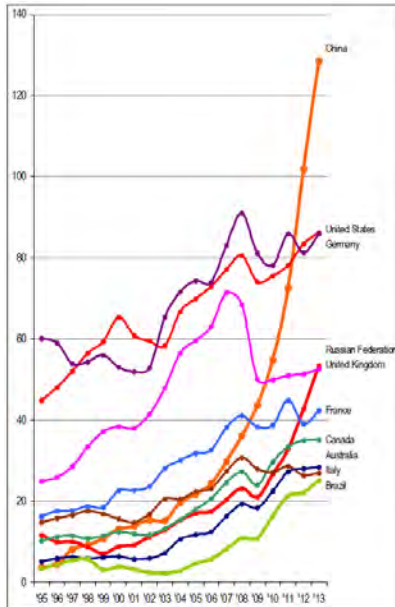
Relevant for the ropeways:

With 50% of all international arrivals, Europe is by far the biggest destination for international tourism. Of course one reason for this is that countries are smaller than in other continents.

Detailed background information:

International arrivals in Europe reached 620 million in 2016, or 12 million (+2%) more than in 2015. Northern Europe (+6%) and Central Europe (+4%) both recorded sound results, while in Southern Mediterranean Europe arrivals grew by 1% and in Western Europe results were flat. Asia and the Pacific (+8%) led growth across regions in both relative and absolute terms, recording 24 million more international tourist arrivals in 2016 to total 303 million. Growth was strong in all four subregions, with Oceania receiving 10% more arrivals, South Asia 9% more and North-East Asia and South-East Asia both 8% more. International tourist arrivals in the Americas (+4%) increased by 8 million to reach 201 million, consolidating the solid results recorded in the last two years. Growth was somewhat stronger in South America and Central America (both +6%), while the Caribbean and North America recorded around 4% more arrivals. Available data for Africa points to an 8% rebound in international arrivals in 2016 after two troubled years, adding 4 million arrivals to reach 58 million. Sub-Saharan Africa (+11%) led growth, while a gradual recovery started in North Africa (+3%). The Middle East received 54 million international tourist arrivals in 2016. Arrivals decreased an estimated 4% with mixed results among the region's destinations.

Global tourism flows: Top 10 outbound markets by trips The big countries in all continents



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| 5. |  | 10. |  |

Basis: International travellers per market in million



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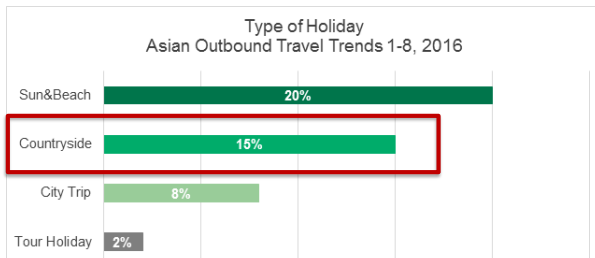
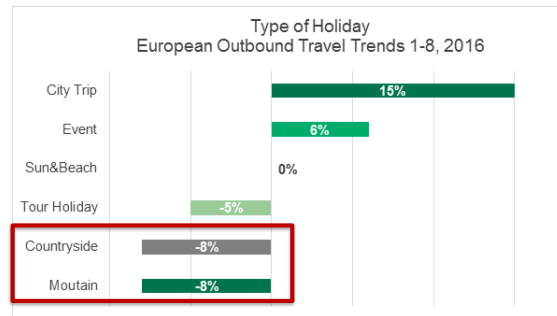
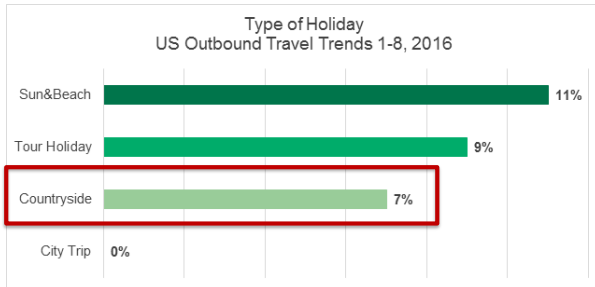
Relevant for the ropeways:

Looking at the top outbound markets we see, that nowadays all the big countries in all continents (except Africa) can be found in the top 10 outbound markets, measured in numbers of international travellers.

In recent years, China has passed the US and German as the biggest outbound market (caution: visits to Macau and Hongkong also count as international travel for Chinese)

Type of holidays: Trends in Europe, Asia and USA

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



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Basis: Change per year in international travellers



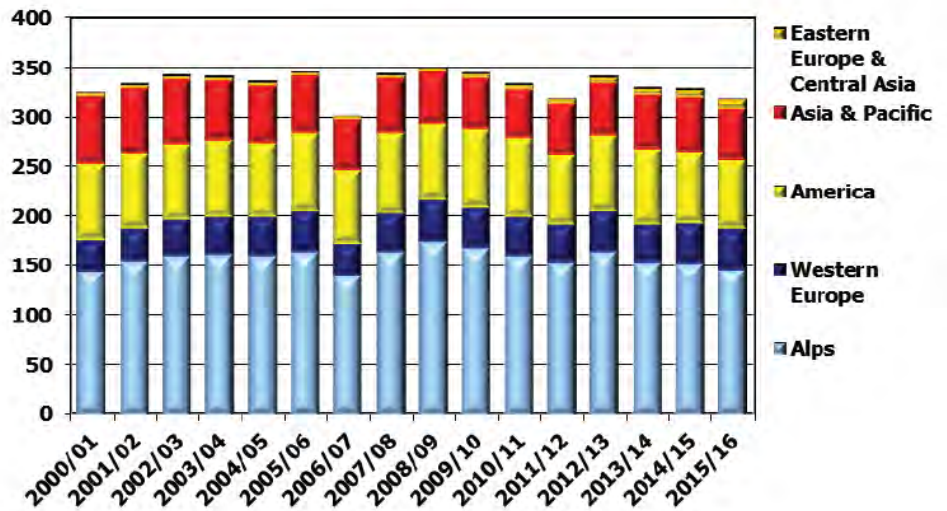
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Relevant for the ropeways:

In the US and Asia, the demand for “countryside holiday” is rising, the Europe the demand for “countryside” and “mountains” is declining.

Important to know and observe these trends to have a good market mix for your destination and ropeway.

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



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Basis: Number of ski visits in million
2017 International Report on Snow & Mountain Tourism

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Relevant for the ropeways:

There are a little more than 300 million ski visits per year, globally. The number of global ski visits is rather going slightly down rather than up. The global development is mainly due to decreases in the Alps during the last decade.

What do we learn for the ropeways?



- International tourism is growing
- Europe is the top destination
- Main outgoing markets are the big countries in all continents
- Mountain and countryside holidays are decreasing in Europe
Countryside holidays are growing in Asia and USA
- 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% 

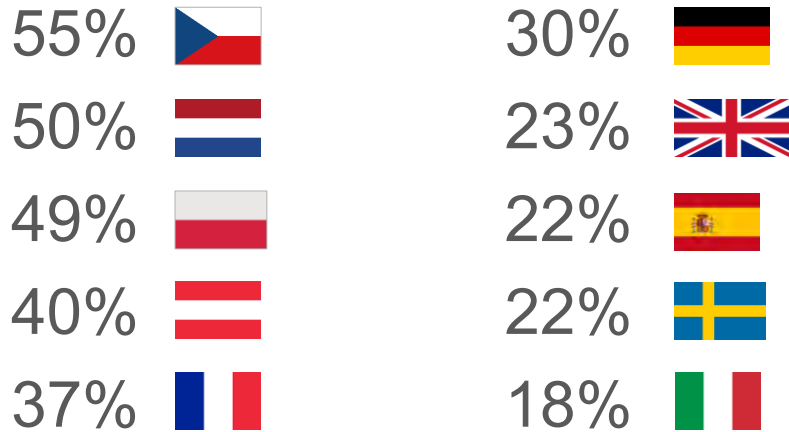
Relevant for the ropeways:

In this section of the presentation we are looking if there are segments in different global markets who can be attracted by the tourist offer that ropeways can provide.

This first study shows us that in all the Top10 markets (regarding international travellers, see slide 5) there is a relevant share of the population who are interested in being active and do or see a lot of things in their holidays rather than just relaxing and taking things easy.

The share varies between 26% in Brazil and 45% in Italy.

Main reasons for going on holidays 2015 for European travellers
 “**NATURE**: mountain, lake, landscape, etc.”



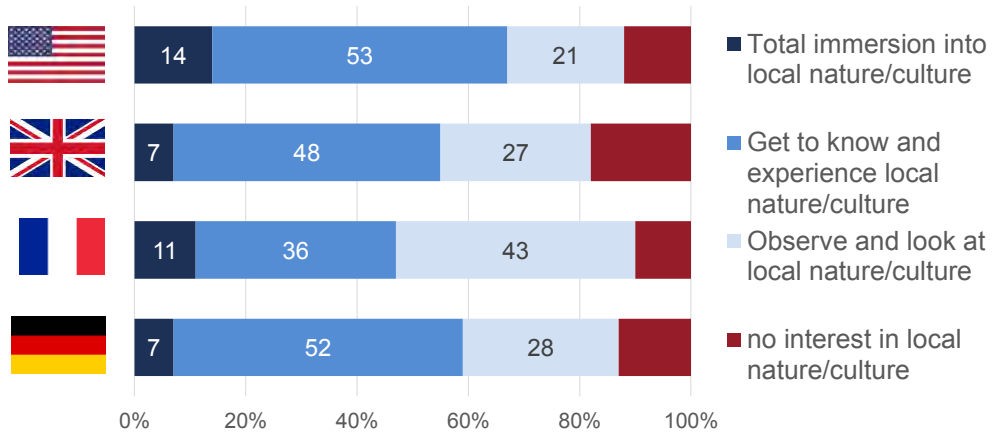
Relevant for the ropeways:

The next study shows us the share of holiday travellers in relevant EU markets who are going on holidays to experience Nature: mountain, lake, landscape.

Here again, we see that in each market you find quite a big share of persons who are into nature holidays, but the differences are even bigger than on the previous slide.

The range is between 18% in Italy and 55% in Czech Republic. This means it is much more likely to attract a Czech with a natural tourist attraction than an Italian.

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



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Basis: Population (ages 16/18-70/75) in the resp. countries

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Relevant for the ropeways:

There are not only differences between markets regarding their affinity towards active and nature holidays, but also regarding the way **how** the travellers want to experience the attractions of a destination.

This example shows the share of persons who are into total immersion, into getting to know and experience or preferring to just observe the nature/culture of a destination.

It is likely that a ropeway experience is best suited for the „Observers“. Again, this shows again, that ropeways and destinations should be aware of their guests' needs and address „their“ segments according to these needs.

What do we learn for the ropeways?



- Looking at the Top 10 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

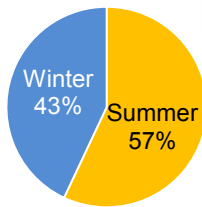
Mountain holidays in Europe →
Most of it is happening in the Alps

120 million arrivals

Almost 400 million
guestnights



40%
of all ski lifts



One of the most
important source
markets

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Relevant for the ropeways:

Now in the second part of the presentation we will take a closer look at the Alps and at the German source market.

This is for 5 reasons:

1. We are now here in Bozen in the heart of the Alps.
2. With an estimated 120 million tourist arrivals and around 400 million guestnights the Alps are one of the hotspots for tourism in Europe. The share of winter and summer is around 43% winter and 57% summer.
3. 40% of all ski lifts in the world are in the Alps.
4. Germany is the most important source market in most destinations in the Alps
5. We, NIT, have very nice and detailed data about the German market.

How many Germans are travelling: Stability

Holiday trips
2016 → 2025:

69 → 68 million

Stable/ slightly
declining

No growth of holiday
travel propensity

Holiday travel
frequency declining

Short breaks
2016 → 2025:

85 → 86 million

Certain potential for
growth

More trips per traveller

More trips of 70+ year
old travellers



The market share of trips
by 60+ years:

30% → ca. 40%

Relevant for the ropeways:

Starting to look at the German market we look at the key figures of volume and the likely trends until 2025:

- Around 70 million holidays trips 5+ days, mostly abroad
- Around 85 million short-holidays, mostly within Germany
- Trend: More or less stability
- BUT: Change of structure due to demographic change → the 60+ year old travellers are already an important segment, but will become even more important

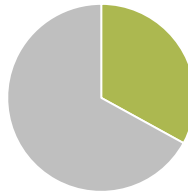
How are the Germans travelling: **Sun&beach** dominates

Sun&beach



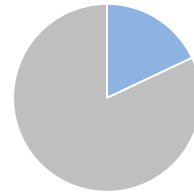
UP

Destination experience
(nature/culture)



UP

Active/sports



SAME

Generally: More comfort, more variation, rising expectations

Relevant for the ropeways:

In trying to find out about the part and volume of the market that is relevant for the ropeways, we first look at the type of holidays of the Germans.

- Here we see that sun&beach holidays are by far dominating (50% of all trips are at least in part sun&beach). And the trend is still going up. This segment is probably not interesting for most ropeways.
- We see about one third of the market that is at least in part about destination experience (regarding nature and culture). This is an interesting segment for the ropeways and the trend is also up.
- The core segment for the ropeways in the winter, active holidays, is comparatively small and not growing.
- In general we see a trend for more comfort, more variation and higher expectations towards the holiday experience – this should be good for the ropeways.

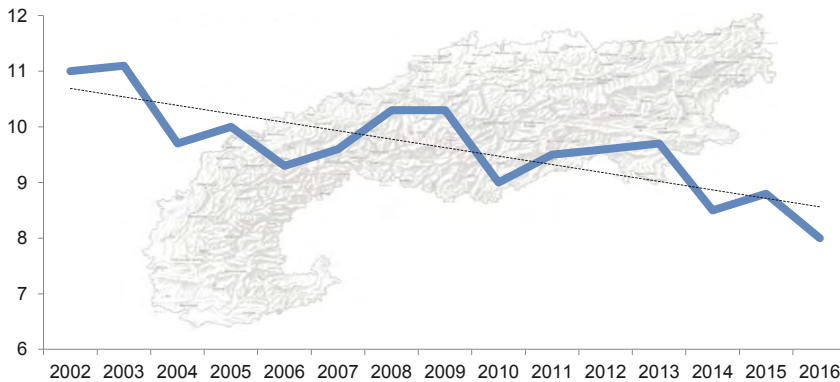
Where do the Germans travel: Shrinking market share of the Alps



1/3 Germany

1/3 Mediterranean

1/3 Rest of world



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

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Basis: Holiday trips of the German population (ages 14+)



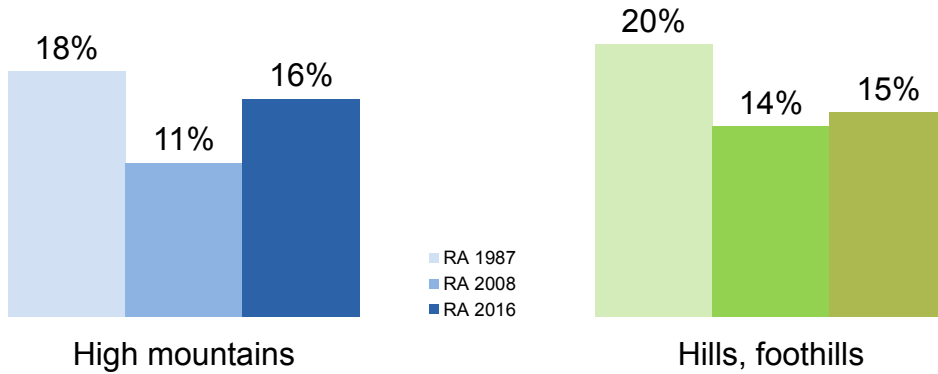
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Relevant for the ropeways:

In a second step, we now look at the holiday destination of the Germans (holidays trips 5+ days) and see:

- Roughly 1/3 of these trips go to Germany, 1/3 to the Mediterranean and 1/3 into the rest of the world.
- Focussing now on the Alps we see a decline in market share from around 11% 2002/20003 to around 8% in 2016.
- Following this trend and even considering some positive factors which are there, it is likely that the market share will further drop.
- In 2025 we expect almost 1 million less holiday trips to the Alps by Germans
- This development is quite dramatic!

Preferred landscape for a holiday:



Relevant for the ropeways:

Looking for a silver lining at the horizon after the negative trends of the actual demand for holidays in the Alps, we find that there is again a rising interest mountains as a preferred holiday landscape. This is also in line with a rising interest (but not yet demand) for destinations in the Alps.

What do we learn for the ropeways?



- The Alps were, are and will be a major holiday destination in Europe
- Germany is the main source markets for most countries in the Alps



- 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

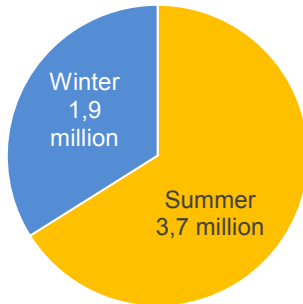


- Ongoing decline of the market share of the Alps
- Silver lining on the horizon:
Rising interest for mountain holidays and for destinations in the Alps

→ German market: Challenging for mountain destinations

→ Understand, adapt, find the right segments

Holiday trips of Germans in the Alps: 1/3 winter, 2/3 summer;
decreases until 2005: summer; 2005→2015: winter



| Summer holidays Alps | 1995 | 2005 | 2015 |
|---------------------------|------|------|------|
| million | 4,9 | 3,7 | 3,7 |
| Share of all summer trips | 10% | 8% | 7% |

| Winter holidays Alps | 1995 | 2005 | 2015 |
|---------------------------|------|------|------|
| million | 2,3 | 2,7 | 1,9 |
| Share of all winter trips | 25% | 19% | 15% |

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Basis: Holiday trips in the Alps of the German population (ages 14+)



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Relevant for the ropeways:

Now we take our stocktaking about German holidays in the Alps to an even more detailed level. In a first step we look at the distribution of holidays in summer and winter:

- Around 1/3 of all holidays are in the winter, 2/3 in the summer.
- In both seasons, volume and market share are decreasing
- Until 2005, the main decreases were in the summer
- Since 2005, the decreases are in the winter

Winter holidays: Austria top, with growing market share;
Fierce competition of the Alps with other regions in the world



| Destinations in the Alps | 2005 | 2015 | change |
|---------------------------|------|------|--------|
| <i>Alps holiday trips</i> | 2,7 | 1,9 | - |
| Austria | 62% | 70% | ++ |
| Switzerland | 15% | 10% | -- |
| Italy Alps | 12% | 11% | - |
| Bavaria Alps | 10% | 8% | - |
| France Alps | 1% | 1% | = |

| Winter destinations | 2005 | 2015 | change |
|--------------------------|------|------|--------|
| <i>All holiday trips</i> | 14,6 | 13,2 | - |
| Alps | 19% | 15% | -- |
| German hills | 6% | 6% | = |
| Northern coasts | 8% | 10% | + |
| Mediterranean | 29% | 30% | + |
| Long-haul | 13% | 18% | ++ |

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Basis: Holiday trips in the Winter (Nov.-April) of the German population (ages 14+)



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Relevant for the ropeways:

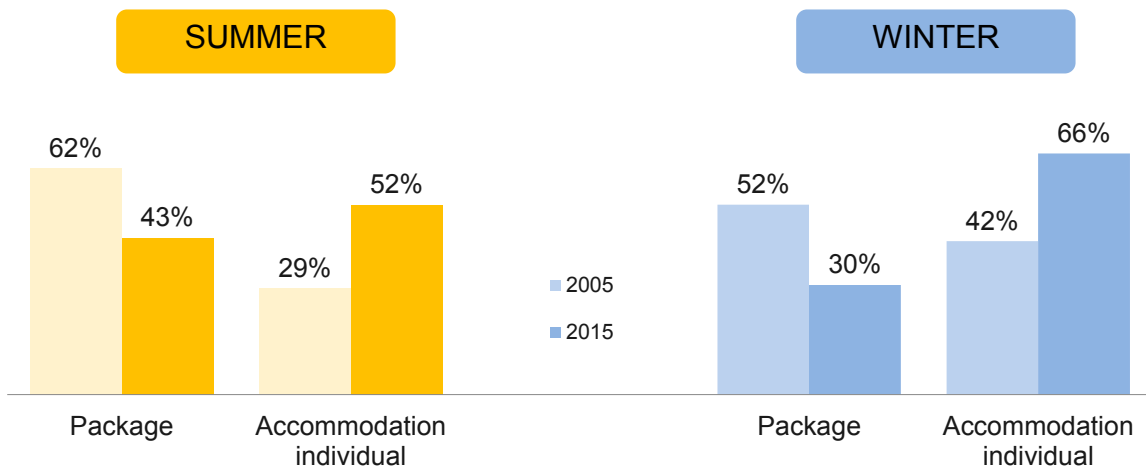
As we just saw that the main challenge nowadays is the winter season, we take a closer look here:

- The development is different for different destinations in the Alps
- Austria could even increase its market share of all German holiday trips in the winter seasons from 2005 until 2015
- All other destinations stagnated or lost market shares, most of all Switzerland

Looking at the competition of the Alps in global context in the winter season, we see:

- The Alps are the only region in the world that significantly have lost market shares.
- The main winner of winter trips of Germans between 2005 and 2015 were long-haul destinations.

Holiday organisation in the Alps: Towards more individual travel in summer and winter → more work for Alpine destinations



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Basis: Holiday trips in the Alps in hotels/b&b of the German population (ages 14+)



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Relevant for the ropeways:

Another interesting aspect with a lot of dynamic is the organisation of holidays in the Alps. Here both seasons follow the general trend towards less package travel and more individual organisation of holidays.

Whereas in 2005, package travel has been the dominating form of travel organisation, it is now the individual booking of accommodation.

This means for destinations and ropeways that they can only to a lesser extent rely on the „marketing help“ from tour operators, but rather have to look for smart ways how to address the potential guests directly.

The seniors are one very important segment, but their love of the Alps is declining

Summer:

42% are 60+ years old

Winter:

22% are 60+ years old

2015

All holiday trips of 60+ = 20,2 million;
Market share Alps: 9,9%

2008

All holiday trips of 60+ = 19,0 million;
Market share Alps: 13,2%

1996

All holiday trips of 60+ = 14,5 million;
Market share Alps: 13,6%

Relevant for the ropeways:

Another challenging development for the Alps is their positioning with the German seniors (60+ years old). Especially in the summer, these is one of the „bread-and-butter-segments“ for holiday destinations in the Alps (42% of all summer trips to the Alps are by this age group).

The challenge is that the Alps are constantly loosing market share despite the growing importance of the seniors (see slide 14):

- 1996, 13.6% of all holiday trips of seniors went to the Alps
- 2008, 13.2% of all holiday trips of seniors went to the Alps
- 2015, 9.9% of all holiday trips of seniors went to the Alps

What do we learn for the ropeways?



- Market share of the Alps
→ declines until 2005 in summer, since 2005 in the winter



- Differentiated trends within the Alps in winter:
→ Austria grew on cost of Switzerland and Bavaria



- Growing competition in the winter
→ Alps have lost, long-haul and Mediterranean are growing



- Individual travel is dominating now in summer and winter
→ No more marketing of the tour operators to count on!
- Seniors: Losing market shares in the bread-and-butter segment
- Possible opportunity for growth → short trips

→ The challenges are now mainly in the winter!

→ Problems due to competition, customer behaviour, climate change

Holiday motivation in Alps: Nature, Indulgence, Activities

| | Alps/Hotel Summer | Alps/Hotel Winter | population |
|----------------------|-------------------|-------------------|------------|
| Nature | 75 | 70 | 55 |
| Relax | 68 | 70 | 65 |
| Sun | 70 | 67 | 66 |
| Spoil yourself | 59 | 57 | 49 |
| Time with each other | 56 | 56 | 50 |
| Recuperate | 48 | 49 | 51 |
| Experience a lot | 47 | 52 | 38 |
| Soft sports | 39 | 42 | 30 |
| Active sports | 24 | 38 | 9 |

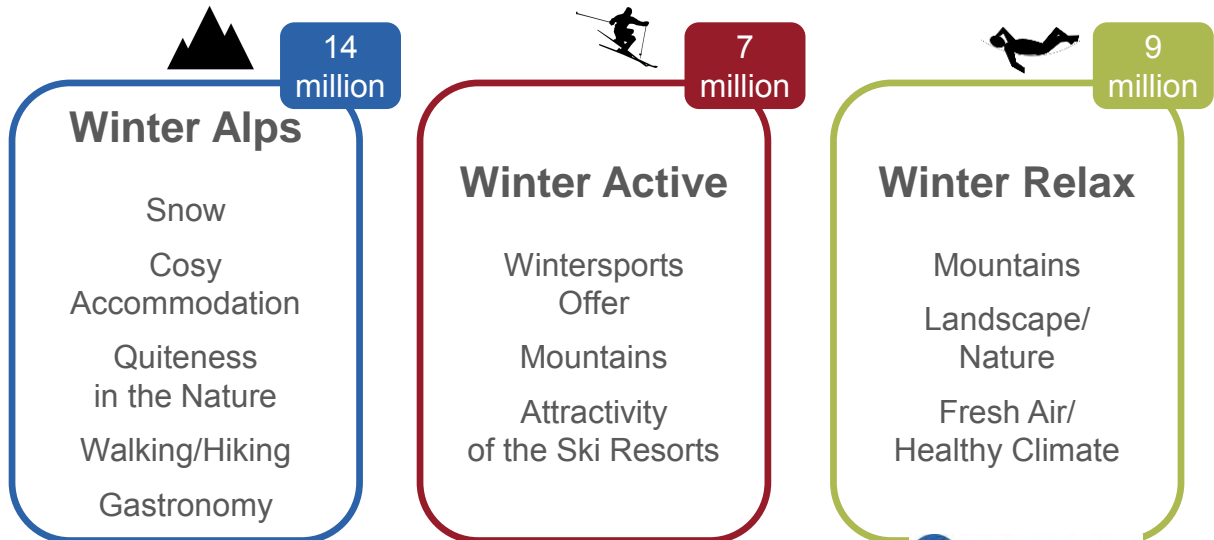
Relevant for the ropeways:

After this detailed stocktaking, we now look for ways how to tackle the challenges of the Alps on the German market. The idea is to identify segments and topics that can be use in strategic marketing and product development to attract more German guests into the Alps.

A first look at the holiday motivation of hotel guests in the Alps in summer and winter gives us important indications:

- In both seasons, the importance of nature, indulgence and activities is much higher than in the population
- Nature and Indulgence are more important in summer than in winter
- Activities are important in winter than in summer

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



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Basis: German population (ages 14+) in the resp. segments

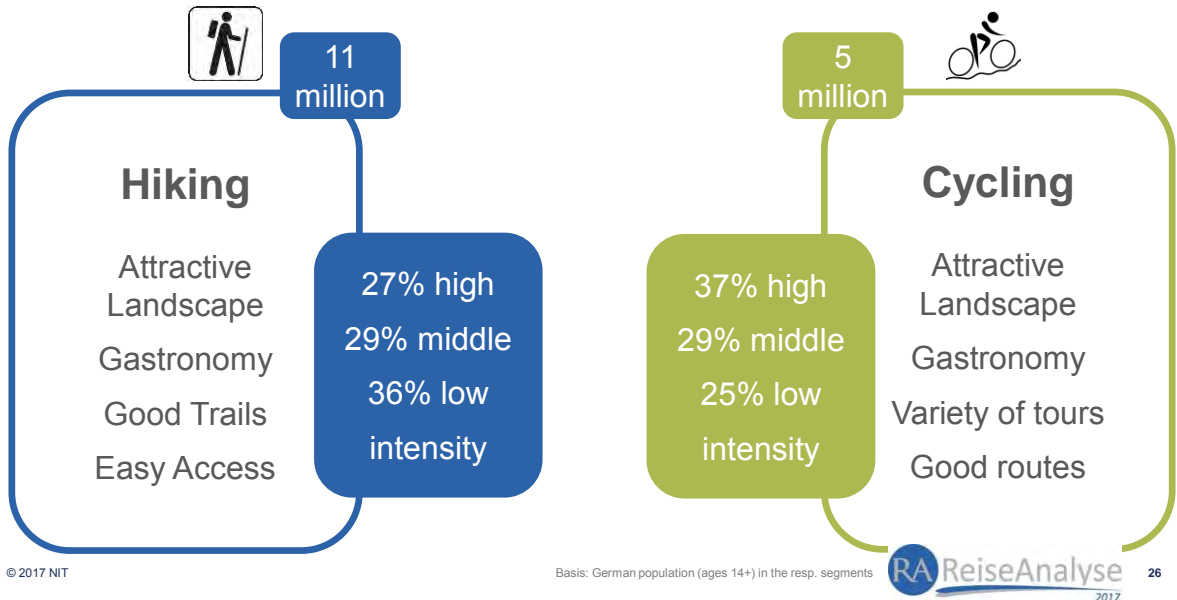


Relevant for the ropeways:

Now we are looking very concretely at different segments for the winter, their volumes and requirements.

- The segment with general interest in winter holidays in the Alps is 14 million strong. Of course for different reasons, not all of these will in the end go on a holiday to the Alps in the next winter! This is true for all the other segments as well.
- What they are looking for when thinking about a winter holiday in the Alps is snow, a cosy accommodation, quietness in the nature, walking and gastronomy. Just 40% of them are looking for winter sports.
- The segment looking for active holidays in the winter/snow is 7 million strong.
- They are looking mainly for the winter sport offer, the mountains and the attractivity of the ski resort.
- This of course is at present the most important segment for most ropeways in the Alps.
- The segment looking for relaxing holidays in the winter/snow is 9 million strong.
- They are looking mainly for mountains, landscape/nature and fresh air/healthy climate.

Segments in the summer: Hiking and Cycling



Relevant for the ropeways:

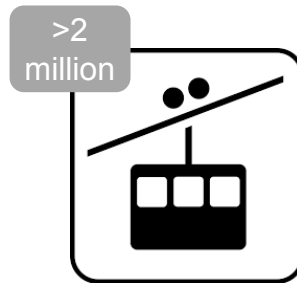
Now we are looking very concretely at different segments for the summer, their volumes and requirements.

- The segment of holiday hikers is 7 million strong.
- They are looking mainly for an attractive landscape, for gastronomy en-route, for good trails and easy access.
- Only 27% of them are “high intensity” hikers, who like to hike more than four hours a day, every day of the holiday. All others take it more leisurely and thus have a lot of time to explore the destination in other ways than hiking.
- The segment of holiday cyclists is 5 million strong.
- They are looking mainly for an attractive landscape, for gastronomy en-route, for a variety of tours and good cycle routes.
- Only 37% of them are “high intensity” cyclists, who like to ride their bike more than four hours a day, every day of the holiday. All others take it more leisurely and thus have a lot of time to explore the destination in other ways than on their bike.

Who are the holiday ropeway users in Germany?

Not only in Winter!

Not only in Alps!



More active!

More destination
experience!

All ages!

Relevant for the ropeways:

We even can identify the German travellers who have been using ropeways during their main holiday trip 2015.

- We identify more than 2 million holiday ropeway users.
- They are not only using it in destinations in the Alps and not only in the winter!
- They are in all ages.
- They are much more active than the average German traveler.
- They are much more into destination experience than the average German traveller.

What do we learn for the ropeways?



- German guests in the Alps are much more into nature, indulgence and activity than the average German



- For winter guests the snow is crucial –
For active travellers its about skiing and skiing infrastructure,
For relaxing travellers about being outdoors in the mountain landscape



- Cyclists and Hikers want to experience the landscape and the gastronomy
A lot of them are not “high intensity” active



- German holiday ropeway users are very active and interested in the destination
They use them also outside the winter and outside the Alps



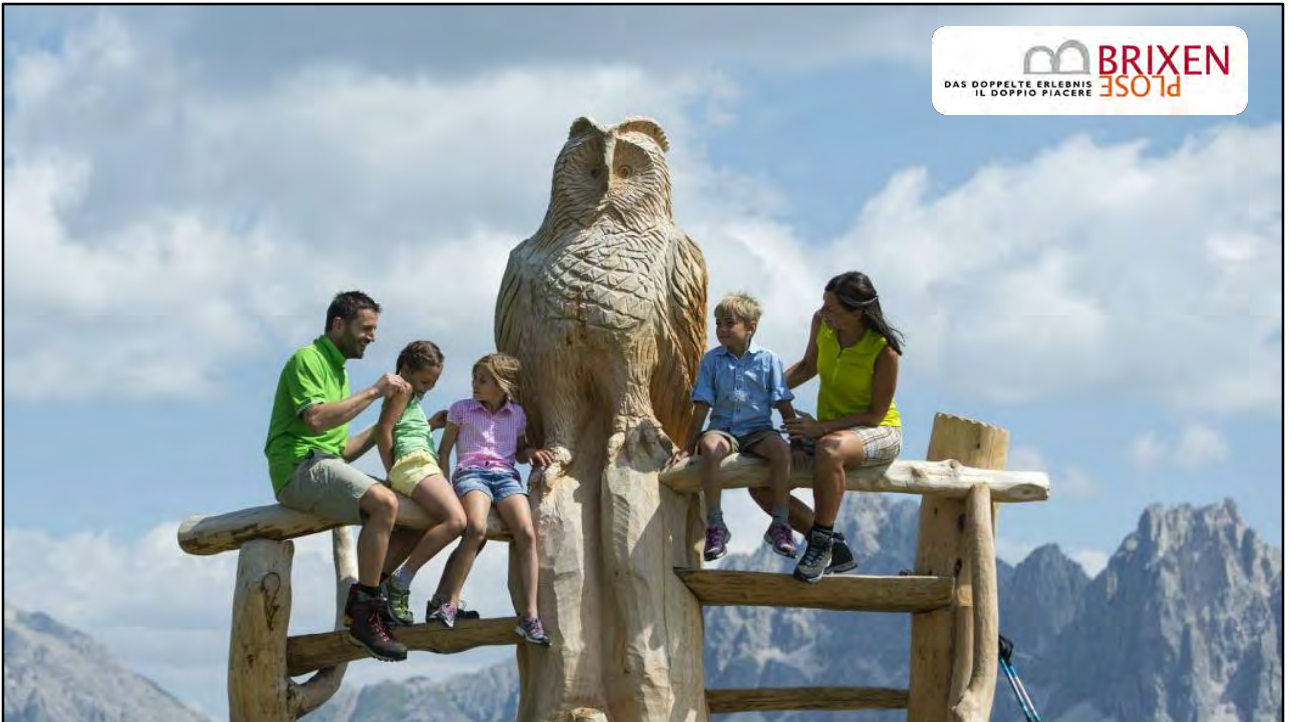
→ There are interesting segments for mountain holidays

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



→ Sometimes it is useful to think out of the box

→ To reach them becomes harder and needs to be done cooperatively
(ropeways, DMOs, tour operators)



At last some very few examples that have crossed my personal way, which I consider embracing the approach of thinking innovatively about promising segments and markets.

The Plose right around the corner: In the summer they have a focus on families with activities and infrastructure for all ages.

It is not high end, and does not involve huge investments, but it gives you a reason to use the ropeway and explore the mountain and its possibilities.

<http://www.plose.org/en/>

COWO Tirol

Höchster Coworking Space der Alpen
am Patscherkofel auf 1.963 m



I recently heard about this: Using the Patscherkofel in Innsbruck as a coworking and event location – to attract a new segment probably because the ski area is internationally not really competitive any longer. Be innovative and still make use of the „old“ ropeway.

<http://www.cowo.tirol/en/cowo-tyrol/>

DE | EN | FR

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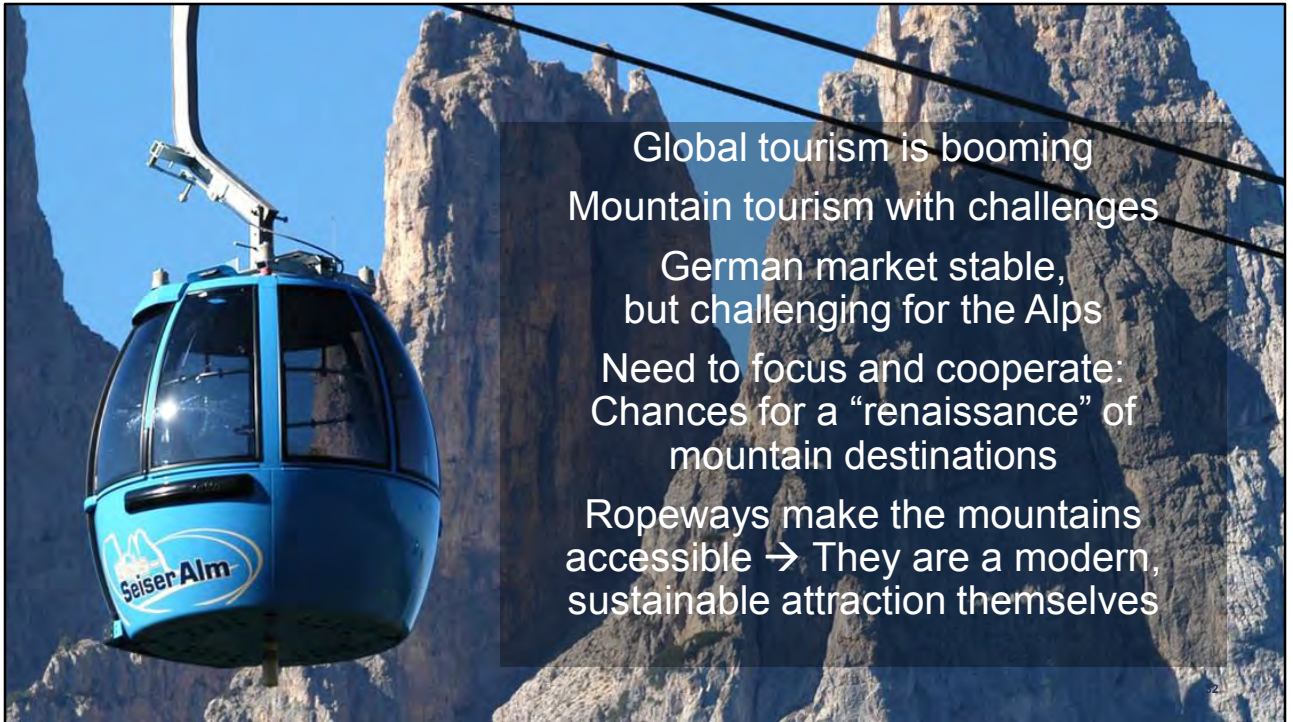
FREE REPUBLIC HOLIDAYS

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Here, I again profitted from the new pricing and marketing approach in Saas Fee. Pay in advance 233 CHF for a season card – but the deal only works if there are 100.000 buyers. This worked in 2016/2017 and again for 2017/2018. Made me and my family committ already for three years of annual ski holidays in Saas Fee.

<http://www.saas-fee.ch/>

<https://www.we-make-it-happen.ch/index.html>



Global tourism is booming
Mountain tourism with challenges
German market stable,
but challenging for the Alps
Need to focus and cooperate:
Chances for a “renaissance” of
mountain destinations
Ropeways make the mountains
accessible → They are a modern,
sustainable attraction themselves

In conclusion we see that global tourism is booming, but that mountain tourism, specifically in Europe and in the Alps and in the “old” markets as Germany faces some challenges.

On the other hand we see, that in almost all big markets in the world, there is a strong desire for a lot of travelers to experience the nature and culture of a destination. There seems to be a genuine interest in an authentic and emotional experience of the destination. Excursions and culinary experiences are top activities when travelling. At the same time “holiday activities” should not be too strenuous. So a majority of travelers want to see and experience a lot, without doing too much walking themselves. All this should be in favour of ropeway transportation to cultural, natural and culinary attractions – and in favour of ropeways being a visitor attraction in itself! And of course we have on top of that the active, sportive tourists, who use the mountains as their playground and the ropeways to get there.



Thank you!

From the ropeway city of Kiel 😊
We really had a ropeway in the 1960s and 1970s ...

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:
www.reiseanalyse.de
<http://www.fur.de/ra/publikationen-presse/trends2025/>



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These are the links to the data sources that have been used in the presentation:

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IPK:

http://www.itb-berlin.de/media/itb/itb_dl_all/itb_presse_all/World_Travel_Trends_Report_2016_2017.pdf

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<http://vanat.ch/RM-world-report-2017-vanat.pdf>

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