



Holidays in the mountains - future trends

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Global trends in tourism flows

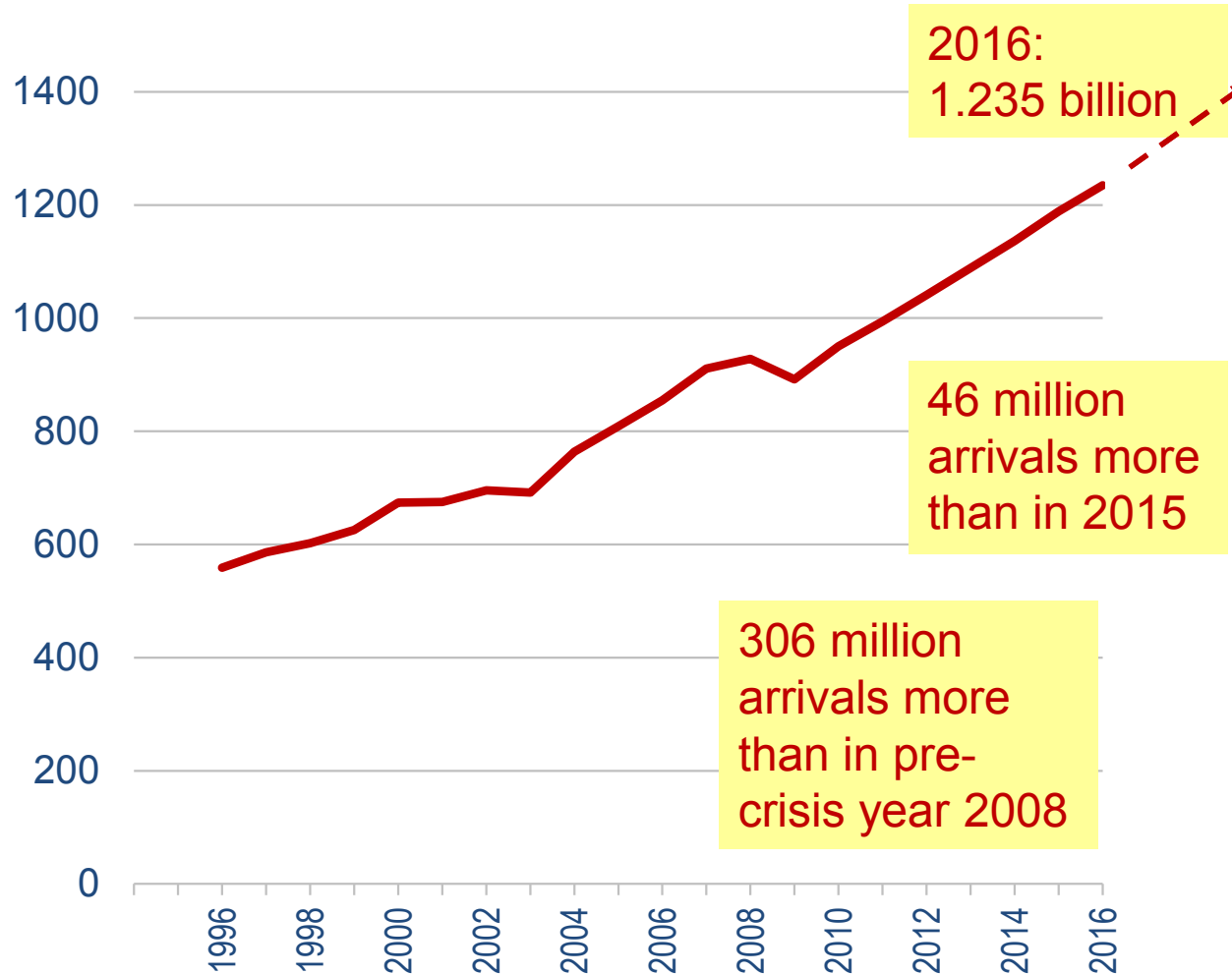
Relevant segments for mountain holidays
in different markets

Trends for mountain holidays
on the German market

Winter and summer holidays in the Alps

Segments for mountain holidays in Germany

Global tourism flows: Number of international arrivals is continuously growing



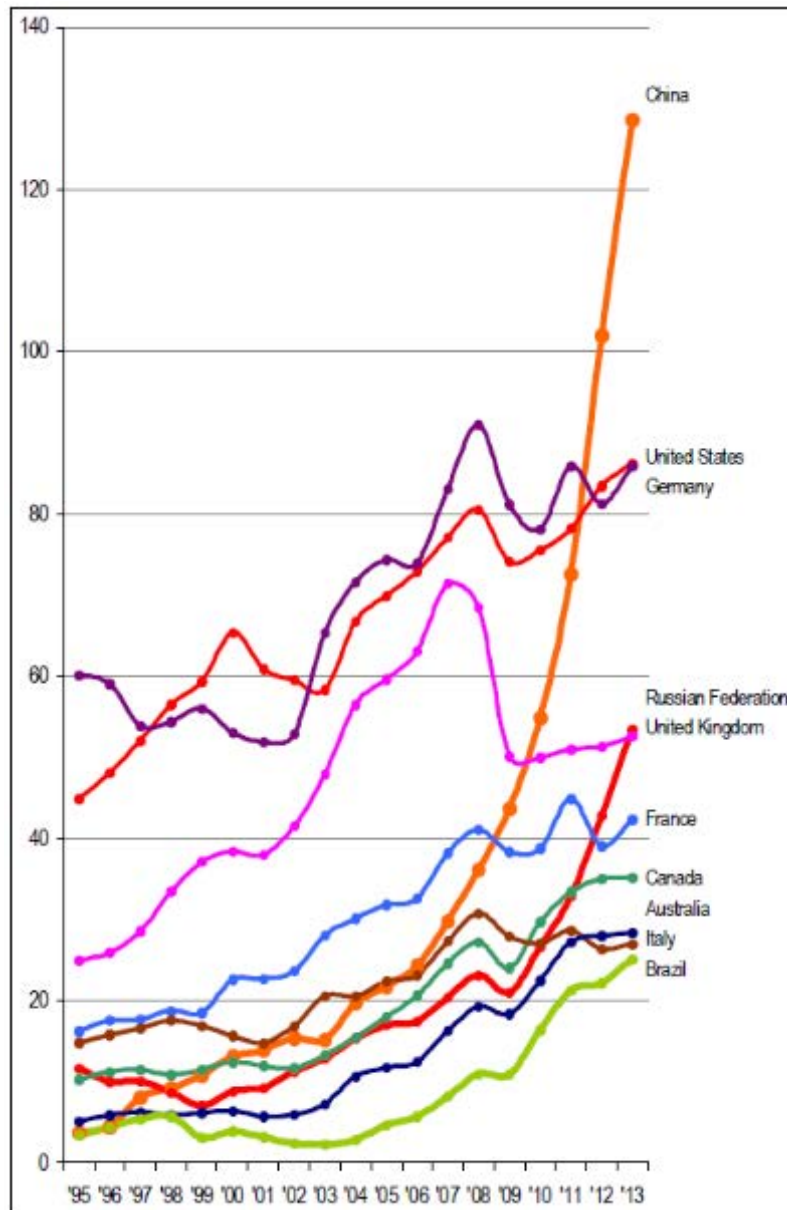
International arrivals 2016: Breakdown by continents

Europe is by far the biggest destination



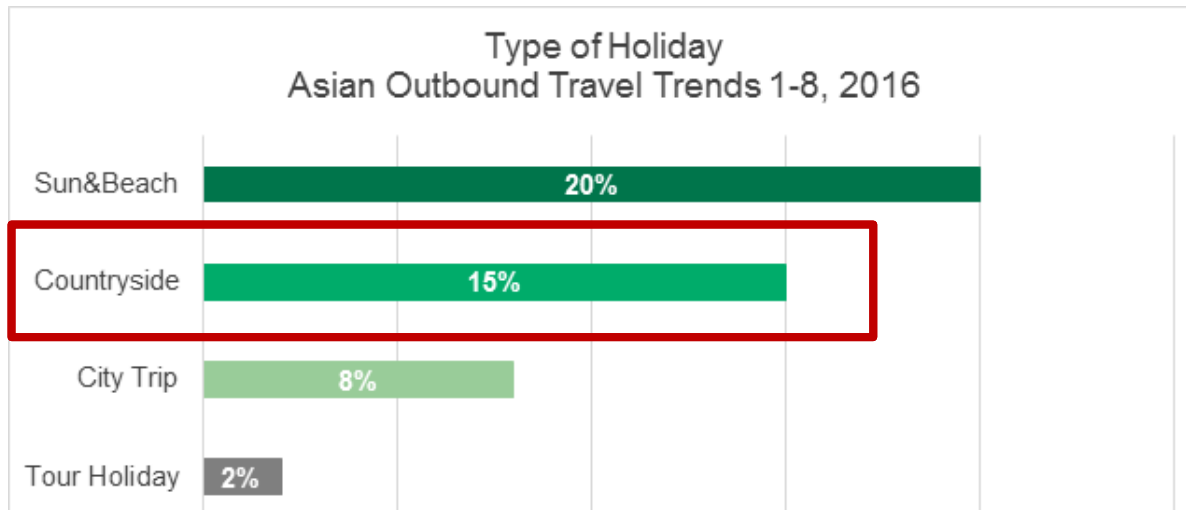
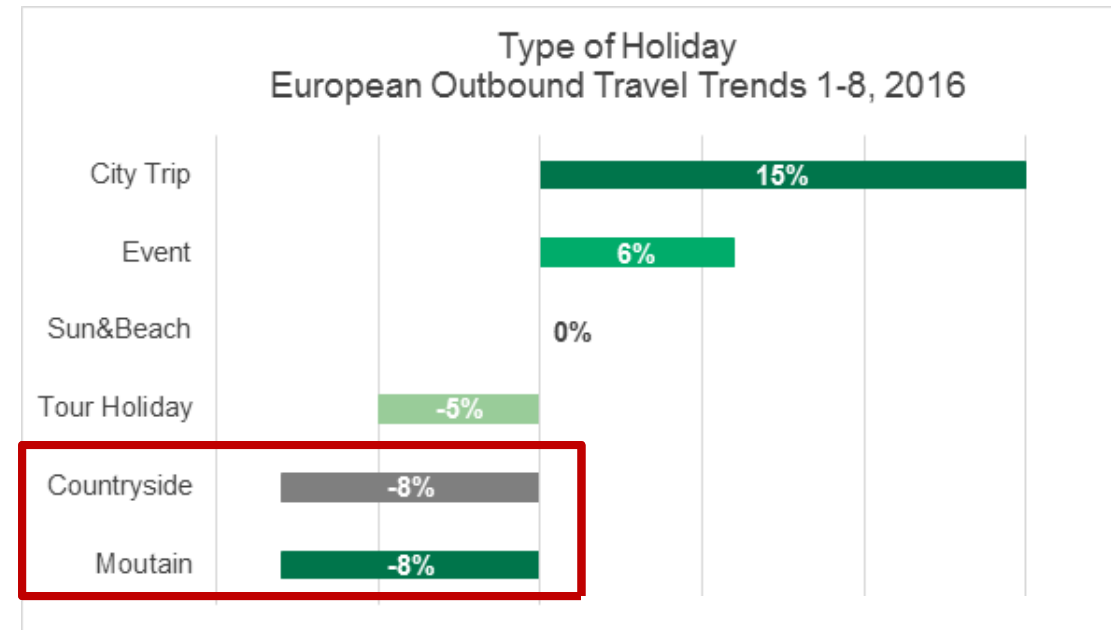
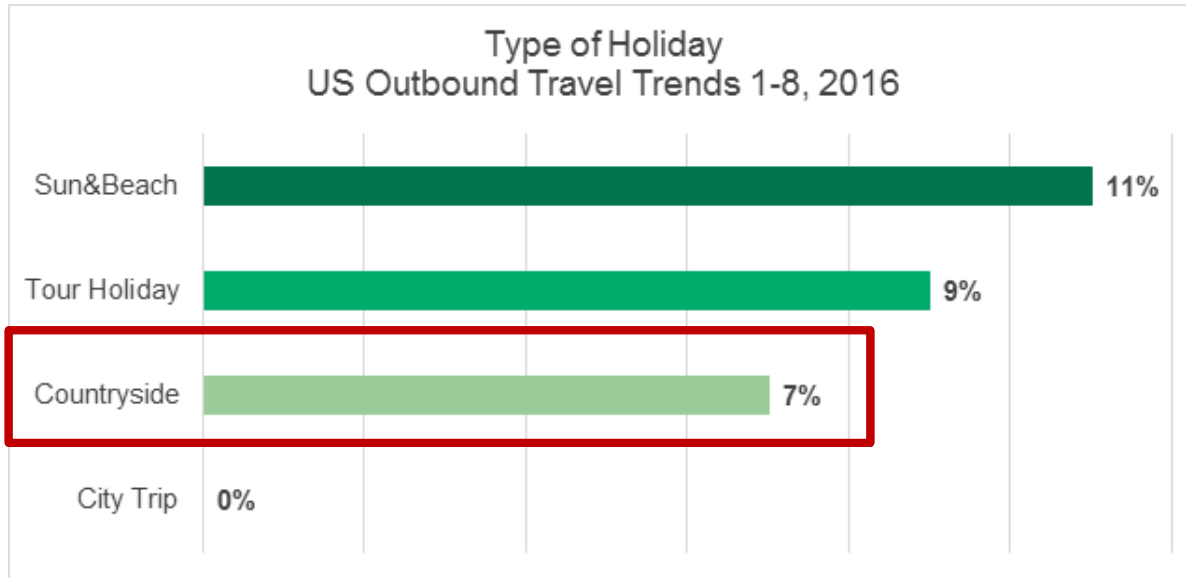
Global tourism flows: Top 10 outbound markets by trips

The big countries in all continents

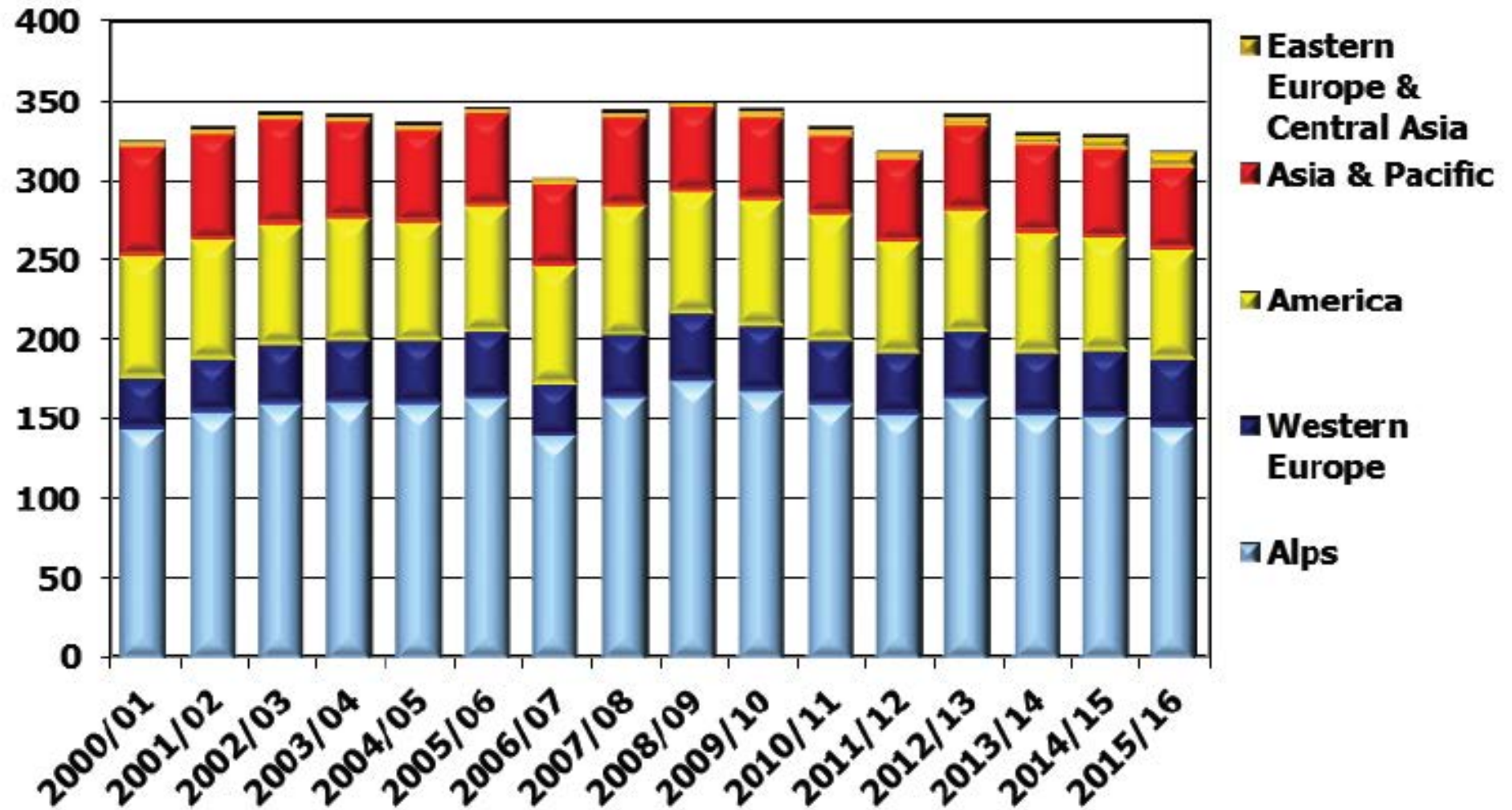


Type of holidays: Trends in Europe, Asia and USA

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



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



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%



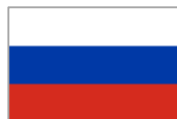
41%



33%



40%



32%



40%



26%



Main reasons for going on holidays 2015 for European travellers

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



55% 

50% 

49% 

40% 

37% 

30% 

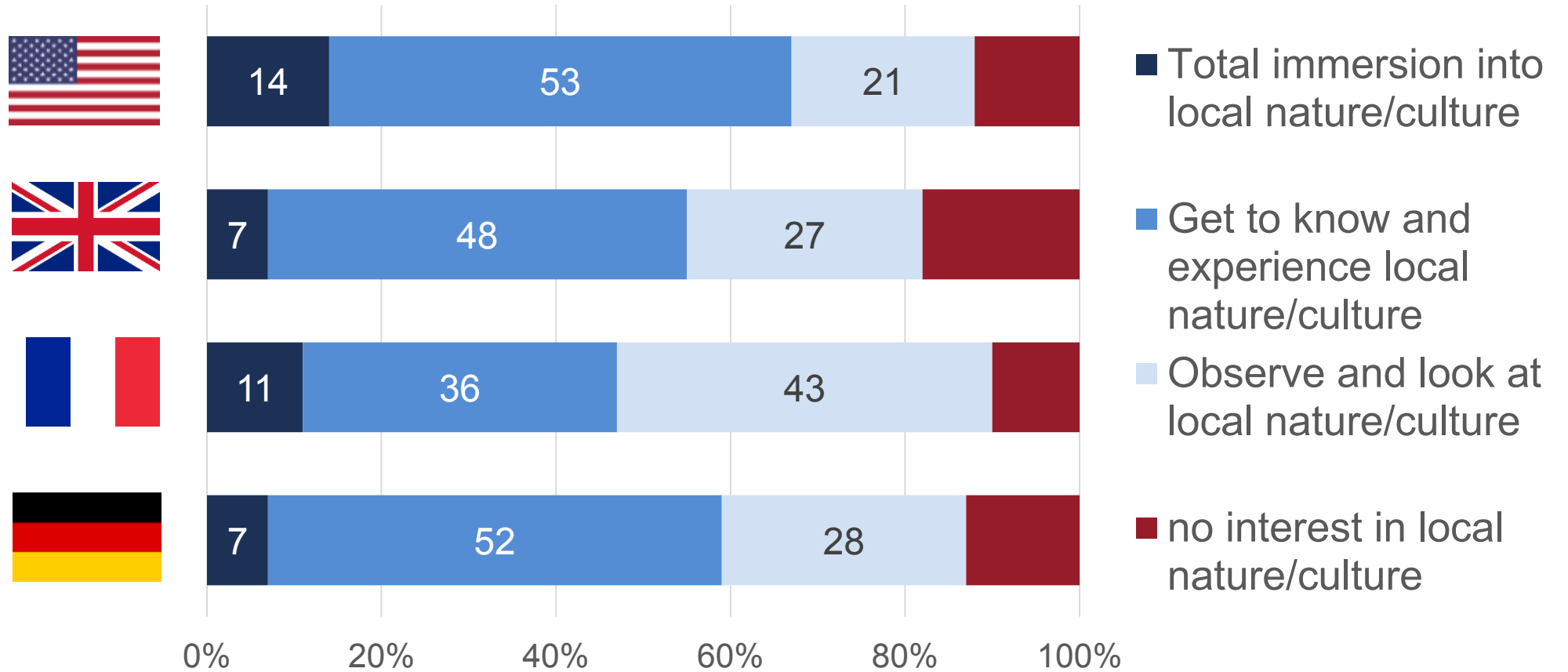
23% 

22% 

22% 

18% 

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



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

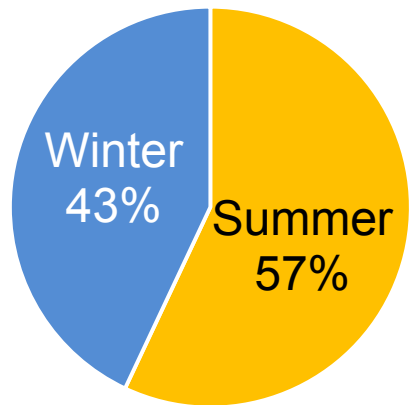
Mountain holidays in Europe → Most of it is happening in the Alps

120 million arrivals

Almost 400 million
guestnights



40%
of all ski lifts



One of the most
important source
markets

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%

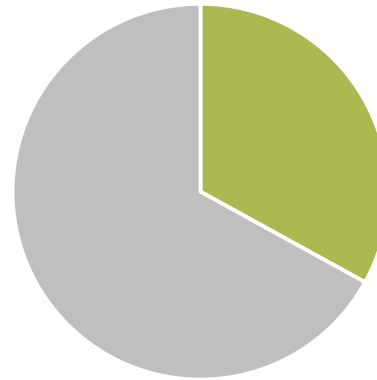
How are the Germans travelling: Sun&beach dominates

Sun&beach



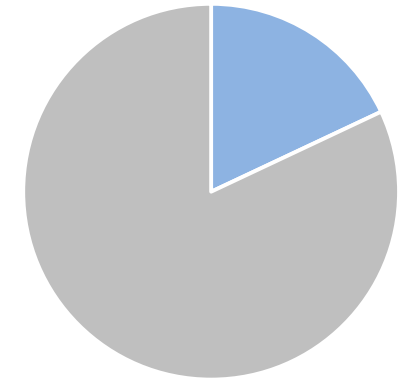
UP

Destination experience (nature/culture)



UP

Active/sports



SAME

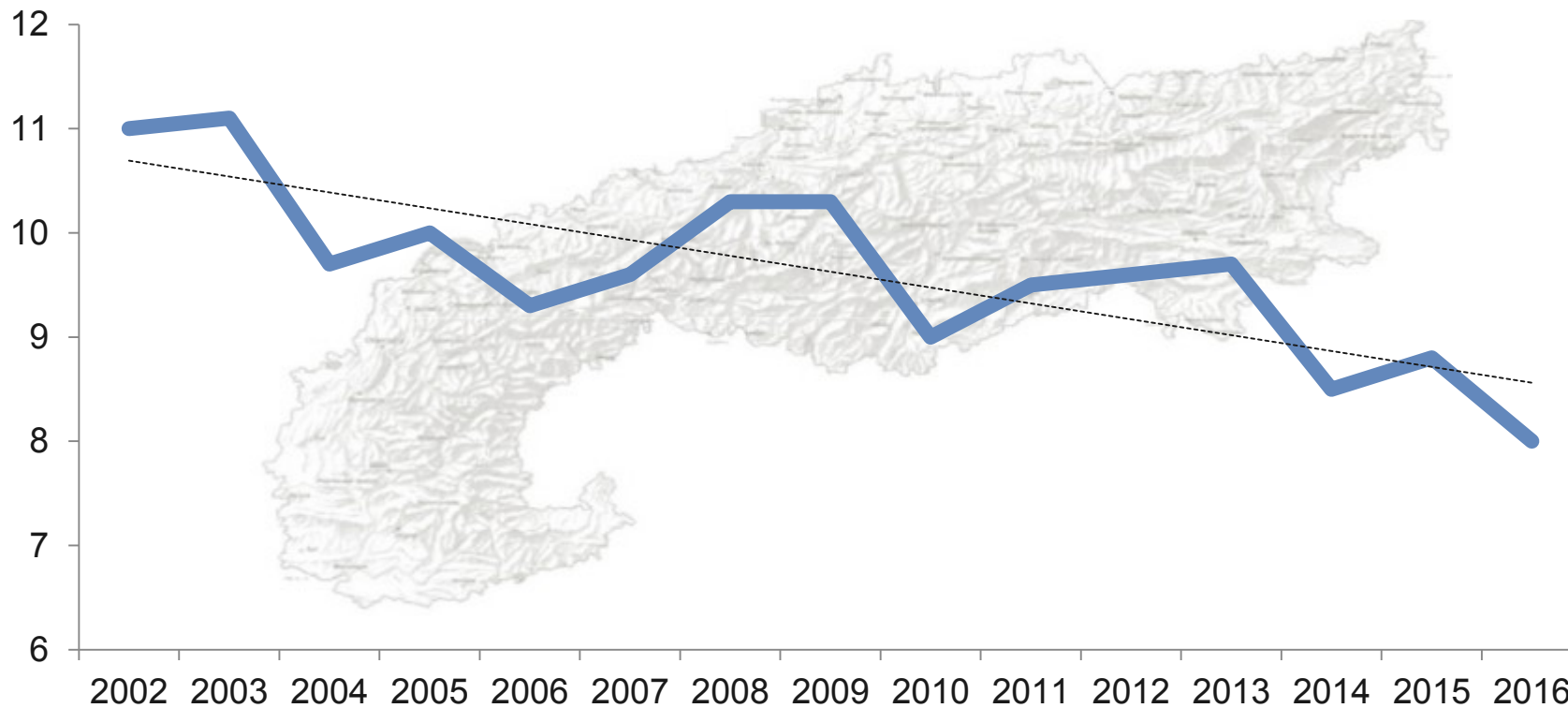
Generally: More comfort, more variation, rising expectations

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

1/3 Germany

1/3 Mediterranean

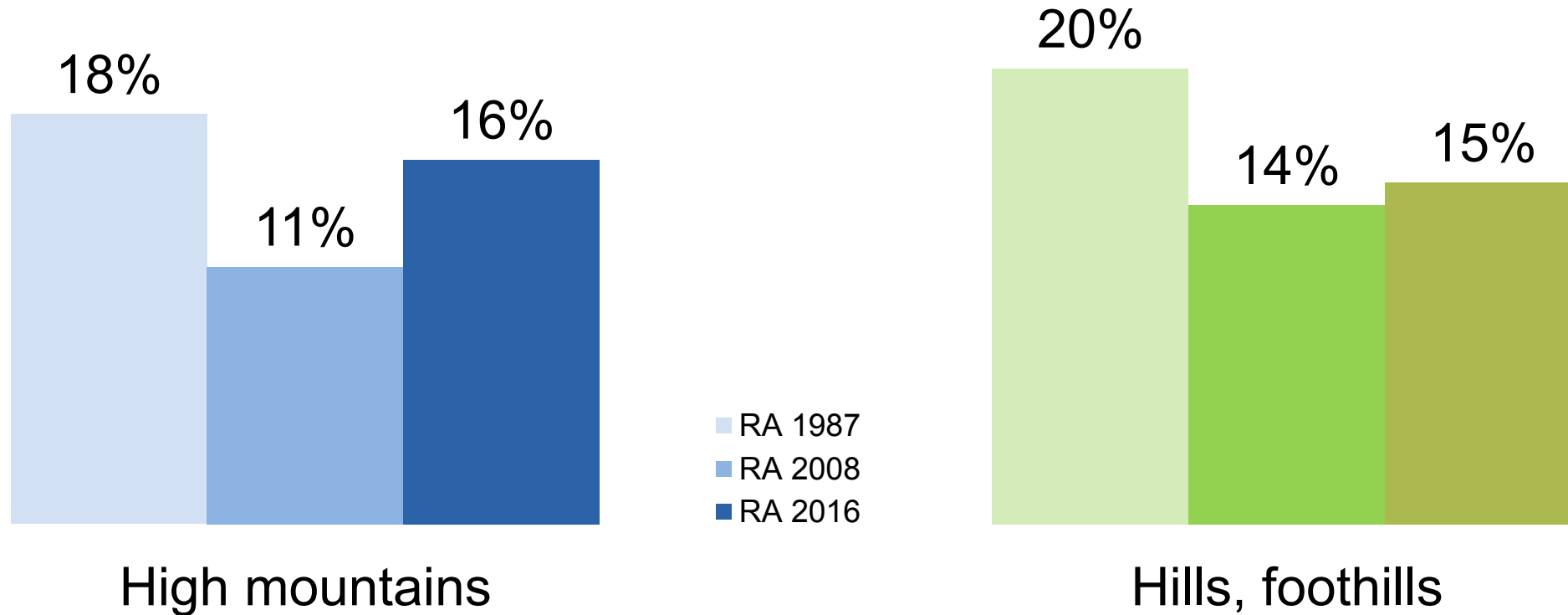
1/3 Rest of world



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:



What do we learn for the ropeways?

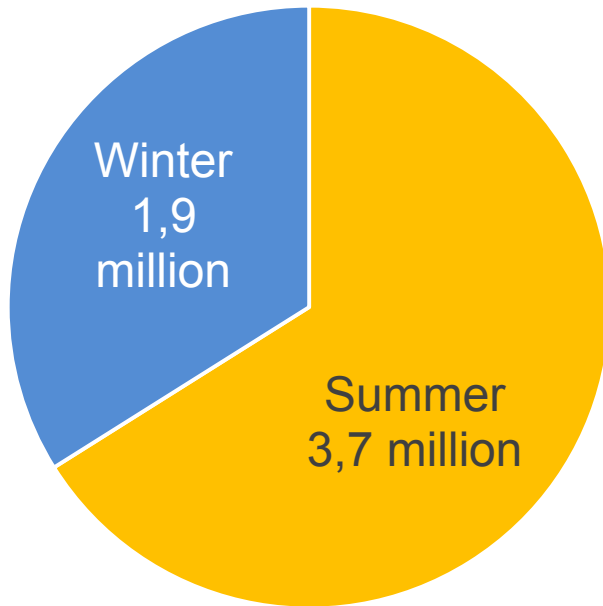


- The Alps were, are and will be a major holiday destination in Europe
- Germany is the main source markets for most countries in the Alps
- The German market as a whole has been and will be very stable
- There is a substantial segment of travellers who are interested in the nature/culture of a destination – 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%

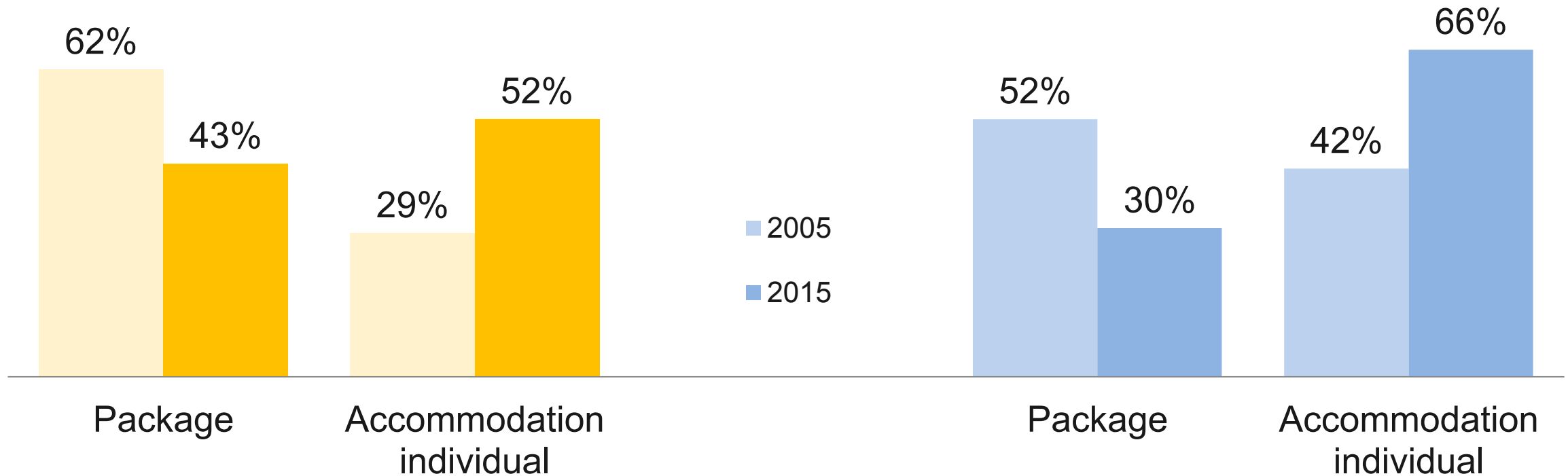
Winter holidays: Austria top, with growing market share; Fierce competition of the Alps with other regions in the world

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%	++

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

SUMMER



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%

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: Loosing 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

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

Segments in the summer: Hiking and Cycling



11
million

Hiking

Attractive
Landscape
Gastronomy
Good Trails
Easy Access

27% high
29% middle
36% low
intensity



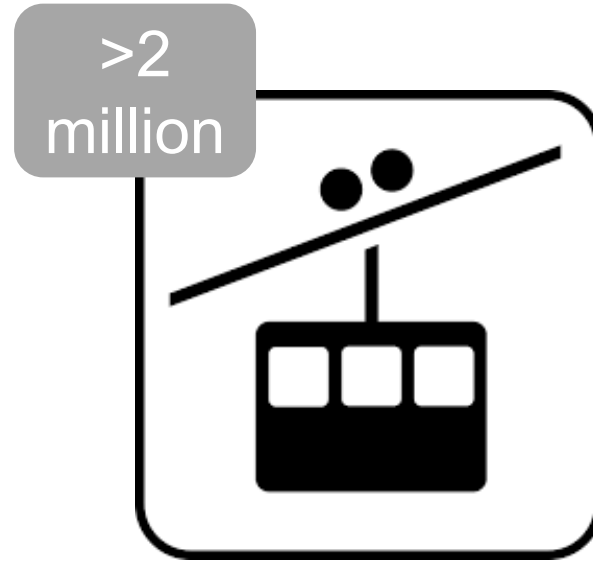
5
million

Cycling

Attractive
Landscape
Gastronomy
Variety of tours
Good routes

37% high
29% middle
25% low
intensity

Who are the holiday ropeway users in Germany?



Not only in Winter!

Not only in Alps!

More active!

More destination
experience!

All ages!

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)



COWO Tirol

Höchster Coworking Space der Alpen
am Patscherkofel auf 1.963 m



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FREE REPUBLIC OF HOLIDAYS





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



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
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