

## **“theALPS Media Summit 2016”: an international research team presents the principal challenges for alpine travel in winter**

As part of the research project “winter travel in the Alps”, a team of researchers from five alpine countries has prepared up-to-date figures on this sector of the industry, based on various statistical sources<sup>1</sup>. The figures determine that the alpine countries together account for approximately 386 million overnight stays of paying tourists (2015 figures) according to MCI Tourismus, which is 14.4 percent of the EU-28’s overnight stays. A further 126 million overnight stays are accounted for by second residences and holiday homes. Put together<sup>2</sup>, almost every fifth overnight stay in the EU-28 takes place in the alpine region.

### **Winter travel in the Alps – a powerful economic factor**

8.2 percent of all overnight stays<sup>1</sup> in the EU-28 fall between November and April in the Alps. In the Alps themselves, the winter season is of great importance, with a proportion of 43.3 percent of commercial overnight stays. Overall, the alpine countries account for over 7.5 million commercial beds, according to BAK Basel. Only every second bed in the Alpine region is a commercial bed, every sixth a hotel bed.

With at present 158 skiing days and 48.2 million active skiers, the Alps account for almost half of skiing days world-wide (45%): a third of these are in Austria alone (51 million skiing days), a further 30 percent (48 million skiing days) are in France. Italy comes next (29 million skiing days), then Switzerland (25 million skiing days), Germany (4 million skiing days) and Slovenia (1 million skiing days).

As the ‘2016 International Report on Snow & Mountain Tourism’ by Laurent Vanat shows, 86 percent of the largest ski resorts with more than one million visitors per winter season are located in the Alps: there are 10,080 cable cars and lifts, 38 percent of the global total. MCI Tourismus in Innsbruck has further ascertained that the 2,174 ski schools in the Alps represent 84 percent of all ski schools world-wide.

<sup>1</sup>Statistical data processed mainly from Eurostat (2016), BAK Basel (2016), Bundesamt für Statistik Schweiz (2016), DESTATIS Statistisches Bundesamt (2016), ISTAT L'Istituto nazionale di statistica (2016), Comité Régional de Tourisme - Provence-Alpes-Côte d'Azur (2016), Rhone-Alpes Tourisme (2016), Republic of Slovenia Statistical Office (2016), Statistik Austria (2016) and Vanat (2016).

<sup>2</sup> Commercial and non-commercial overnight stays

<sup>3</sup> Commercial and non-commercial overnight stays

## Three principal challenges for winter travel

During the theALPS Media Summit on November 19th 2016 in Innsbruck, the researchers of the project group, Harald Pechlaner, Ralf Roth and Hubert Siller, presented further key results from the research project “Winter travel in the Alps” along with the so-called “principal challenges for Winter travel 2030”

### 1. The economic factor of snow

“The snow experience is unique and can therefore not be replaced” was the opening line from Hubert Siller from MCI Tourismus in Innsbruck, who presented the challenge of “The Snow Experience Economy”. “That the Alps demonstrates great competence in this respect can be deduced from the very high level of guest satisfaction”. The *Bergprofilstudie* (mountain profile study) carried out by MCI in 2014, for example, showed that 62.5 percent of all German guests are ‘very satisfied’ with their winter holiday in the Alps, an additional 29.7 percent ‘satisfied’. Present-day evaluations from Net Promotor Scores (NPS), carried out in numerous winter sport regions, confirm these very high levels of satisfaction with values of over 50 (= excellent).

The ‘economic factor of snow’ forms the backbone for many alpine regions, both economically and socially. This is particularly true for the Tyrol, Salzburg, Vorarlberg, Graubünden and Wallis, where at least two thirds of the tourism revenue is generated in winter. As the average daily outlay in winter is approximately 30 percent higher than in summer, winter tourism is *the* driving force for business investment and destinations.

Snow is the basic requirement here, as well as being a principal consideration for the holiday experience: present market research studies, analysed by the researchers during the comprehensive literature screening, reveal that movement, active regeneration/relaxation in a wintry atmosphere, and fresh air represent the positive associations of guests with winter travel in the Alps.

Siller saw the main challenge for the further evolution of the ‘Snow Experience Economy’ as the successful and sustainable development of future generations of winter sports enthusiasts, especially against the backdrop of the rapidly changing social structures in the future markets.

## 2. Sustainable travel with a view to climate change

A consensus has arisen amongst experts, confirmed by the results of comprehensive literature screening, that the climate in the alpine region has also greatly changed over the last few decades. It is to be expected, according to recognised scenarios, that the average air temperature during the winter months in the Alps at an altitude of 2,100m will rise by approximately 2° Celsius. However: “Especially in the near future, it is not possible to foresee localised winter sport conditions, such as temperature, snow cover amounts and duration of the snow cover”, stated Ralf Roth during his presentation of the challenge ‘Sustainability and Climate Change’. Therefore, specifically in the field of alpine travel, a qualitative development using sound judgement is called for, as well as more spreading of risk by implementing additional options. It is also clear that investment in the sustainable management of energy, water and surface areas is economically sound and could lead to an advantage over the competition in the international tourism sector.

Winter guests predominantly originate from the alpine countries themselves: Switzerland (55 percent nationals), Italy (65 percent nationals) and France (70 percent nationals). Only Austria and Andorra attract more skiing days from abroad. The researchers are in agreement that the substitution of winter travel in the Alps by overseas travel, sun & beach holidays or cruises would clearly negatively affect the climatic footprint of tourism. And, furthermore: individual, motorised travel is one of the biggest challenges facing winter tourism. Even more innovative solutions regarding mobility between smart cities and winter sports destinations are therefore required.

The research group also specifically investigated the question of the social sustainability of winter travel: winter hikes, cross-country skiing, tobogganing and also simple regular skiing demonstrably reduce the factors for illness and thus promote health, efficiency and well-being. Roth: “We know that these exercise possibilities in winter promote corporal activity and thus contribute to the prevention of illnesses associated with movement. They are good for children's development and they reinforce the immune system and people's mental health and psychic well-being. Particularly important, they also have a socio-integrative function”. Active regeneration/relaxation, as is the case with snow sports, has a proven higher and lasting effect on health than other forms of passive regeneration/relaxation.

### **3. Product rejuvenation with a view to change management**

With the classical 'Skiing Holiday in the Mountains', the alpine countries set down a marker that is difficult to compare internationally. In recent years, technical installations above all have been improved to ensure that the winter guest enjoys an impressive winter sports experience. The challenges for the future of winter holidays in the Alps are now a question of fine-tuning and in the further development of this classical product, as well as in the structuring of emotional reactions, as Harald Pechlaner explained using the example 'Product Rejuvenation'.

"Entrepreneurial initiative is essential when it comes to product innovation" according to Pechlaner. "Especially in the destinations, good network structures, the creation of synergies on all levels and defined responsibilities are decisive for ensuring competitive success".

Pechlaner maintained that three specific areas of strategy will be decisive for the future of winter travel: mobility defined by the excellent quality of the infrastructure and lift installations, followed by the attraction of the innovative services and products available, especially in the winter sports sector; the area offering most potential is the experience itself wherein the emotion and atmosphere of the mountain experience in summer and winter must be emphasised.

The results of the Delphi study and the opinions of the experts questioned can be seen as a clear signal to the tourism sector in the alpine region: ongoing investment in the quality of winter travel in the Alps alongside long-term efforts to achieve acceptance by local people and stakeholders, as well as complete understanding for and intensive analysis with the guests, is the best and most effective method of securing this economic sector – so important for many alpine valleys – over the next few years. Entrepreneurial initiative, flexibility and adaptability are necessary for this.

## **Background information on the research assignment**

The AlpNet Association has committed itself throughout 2016 to the topic 'The future of Winter travel in the Alps', which is critical for alpine tourism, and has awarded a research contract focussed on the following question: how can Alpine Winter tourism remain competitive amidst global competition so that life and the economy remain both possible and worthwhile in rural areas?

### **Inter-disciplinary focus, throughout the Alps**

It was and is the declared aim of AlpNet that this research project encompasses the whole of the alpine region, as far as is possible, and extends beyond classical winter sports to an interdisciplinary approach. The focus of investigation was therefore not confined to the issue of winter sport, but also embraced topic areas like innovation, destination development and destination management, health, sustainability, climate change, mobility, travel and consumer behaviour, and more besides.

The research contract was awarded by the association AlpNet to the association Future Mountain International. For many years, Future Mountain has intensively addressed the future of the mountain experience. As a platform for the interchange between science and practice, whose members currently come from Austria, Switzerland, Germany and South Tyrol, it is particularly suitable as a hub for the representative project.

### **Collaboration of researchers from five Alpine countries**

For the project 'Winter travel in the Alps', a circle of experts was brought together within the framework of the Future Mountain International association, the main representatives of which will present the results of the research project at the symposium. They are:

- FH-Prof. Mag. Hubert Siller, MCI Tourismus Innsbruck, Austria (scientific leadership)
- Prof. Dr. Ralf Roth, Head of the Institute for 'nature sport' and ecology at the German Sports College in Cologne, Germany
- Prof Dr. Harald Pechlaner from EURAC Research in Bolzano, Italy

Also involved in the leadership of the research project were Prof. Dr. Thomas Bieger, Institute for systemic Management and Public Government, the University of St. Gallen, Switzerland. The expertise of Professor Philippe Bourdeau of the Institute for Alpine Geography at the University of Grenoble-Alpes, and of Willy Fux (LHM Conseil), was bought in when needed for the French market.

### **Three pillars of the research project**

From March to August 2016, the research team intensively investigated 'The future of winter travel in the Alps' using comprehensive document screening throughout the Alps. The first ever report concerning the awareness and level of knowledge in this important field covering the whole alpine region was thereby produced. The screening comprised approximately 250 publicised and non-publicised documents; scientific literature, business correspondence, specialist documents, presentations and technical papers, etc. The investigation time-span was set as between 2010 and 2016, exceptions being made for any particularly pertinent content. The documents examined were mostly drawn up in either German or English, partly however in French or Italian. Particular attention was paid to ensuring that, geographically speaking, as much as possible of the alpine region was included.

From July to August 2016, a Delphi study was carried out among academic experts and practitioners in the alpine region on the theme 'The future of Winter travel in the Alps'. The most important findings of the screening had already been included during the preparation of the questionnaire (see 3a). A total of approximately 90 experts and practitioners from five Alpine countries (A, D, CH, F and I) were invited to participate in this Delphi study. 33 experts and practitioners took part in the survey, 12 from academia and 21 from the scientific sector (12 Austrians, 6 Swiss, 8 Germans, 1 French, 6 Italians)

The third pillar of the research project comprises an outline of the 'Challenges 2030' needed to ensure the future of the business model 'Winter travel in the Alps', which has been provided by the researchers and experts of the competence group.

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