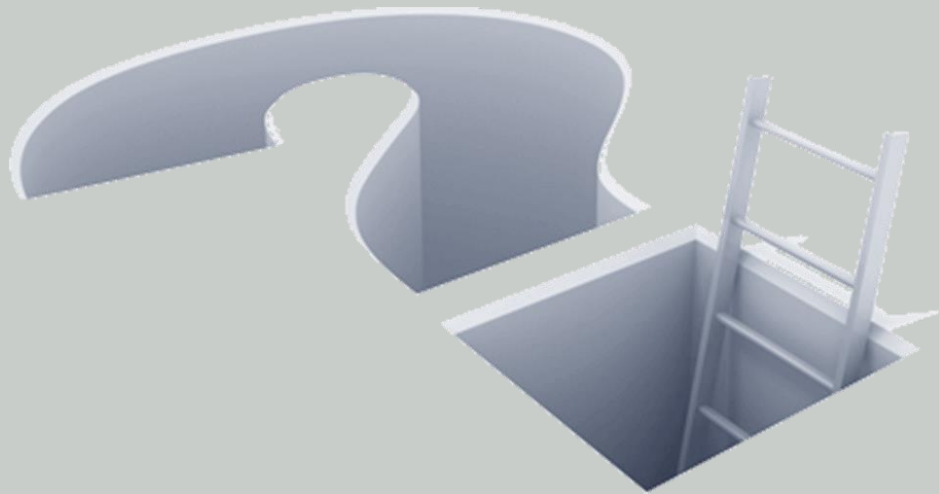


# Topic Study „Hiking“ and Vacationer Typologies 2017

*Main Topics & Implications*



# Main topics

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1. Identification of the precise offerings with the highest utility for the target group, for each country market respectively
2. Understanding of the term "hiking" within the context of the target group. How is "hiking" being interpreted by members of the target group? (e.g. long distance hiking/ trekking, mountain climbing, altitude hiking,...)
3. Identification of motives, which aim at an impactful and efficient approach of the target group
4. Characterization of alpine hiking vacationers and identification of dissimilar segments - each with their own specific demands
5. Importance of the factor convenience in the course of alpine hiking holidays

	Survey Areas <sup>1</sup>	Sample Size
<b>Germany</b>	Bavaria, Baden-Württemberg, North Rhine- Westphalia, Hesse	500
<b>Austria</b>	Lower Austria, Upper Austria, Vienna	500
<b>Switzerland</b>	Aargau, Bern, Zürich	500
<b>Netherlands</b>	Amsterdam, Rotterdam, Den Haag, Utrecht, Brabant, Limburg	300 <sup>2</sup>
<b>Belgium</b>	Flemish Region (conurbation Ghent, Bruges, Antwerp), Brussels	300 <sup>2</sup>
<b>Italy</b>	Veneto, Lombardy, Emilia-Romagna, Lazio, Friuli Venezia G.	500
<b>France</b>	Île-de-France, Alsace, Lothringen	500
<b>Great Britain</b>	South England, Greater London, Manchester, Birmingham	500
<b>Czech Republic</b>	Greater Prag, Plzeň (conurbation)	500

<sup>1</sup> According to estimations, these are the regions within the respective country markets with the highest incidence rates in the target group of alpine vacationers with affinity for hiking.

<sup>2</sup> Due to low incidence rates in the Netherlands and Belgium the Research Institute could not guarantee a final sample size of n = 500 (particularly with respect to representivity).

# Country Markets and Regions



**Puristic  
Nature  
Lovers**

**Adventurers**

**Strolling  
Leisure  
Gourmets**

**Exploring  
Families**

**Allrounders**

# Typologies

	<b>Puristic Nature Lovers</b>	<b>Adventurers</b>	<b>Strolling Leisure Gourmets</b>	<b>Exploring Families</b>	<b>Allrounders</b>
<b>Hiking Motives</b>	<p>Experience Nature</p> <p>Be in the Fresh Air</p> <p>Physical Activity</p>	<p>Adventure &amp; Adrenaline</p> <p>Physical Activity</p> <p>Achievement</p>	<p>Regional Cuisine</p> <p>Authentic Alpine Life</p> <p>Fresh Air</p> <p>Inner Peace &amp; Escape</p>	<p>Social Experience (Family Holidays)</p> <p>Relax &amp; Recover</p>	<p>Adventure (Hiking as alternative holiday activity)</p>
<b>Characterization of hiking holidays</b>	<ul style="list-style-type: none"> <li>- Hiking is the most important holiday activity</li> <li>- Spend the most time hiking</li> <li>- Hike with friends or alone</li> <li>- Go on the longest hikes</li> <li>- Only need hiking essentials (overview map, markings,...)</li> <li>- Don't need the assistance of cable cars for the ascent</li> </ul>	<ul style="list-style-type: none"> <li>- Looking for extraordinary alpine experiences (sunrise/sunset, huts, ...)</li> <li>- Fun activities (alpine coaster..)</li> <li>- Trekking, long-distance hikes and pilgrimages</li> <li>- Extremely active on holidays (sports, wellness, events)</li> <li>- High demands towards accommodation (hiking expertise, menu, wellness)</li> </ul>	<ul style="list-style-type: none"> <li>- Look for an overall enjoyable sensory experience</li> <li>- Relaxed day trips in the valley but also on the mountain</li> <li>- Prefer easy trails &amp; resting points along the route</li> <li>- Visit local restaurants</li> <li>- Hike with their partner/spouse</li> <li>- Positive attitudes towards mountain cable cars (a help to cope with the ascent)</li> </ul>	<ul style="list-style-type: none"> <li>- Prefer trails with low difficulty</li> <li>- Stress-free day trips on the mountain and in the valley</li> <li>- Shy away from high altitudes</li> <li>- Hiking is one activity among many (swimming, shopping...)</li> <li>- Hike with spouse and children</li> <li>- Interested in family-friendly offers, summer alpine coasters, high-rope courses...</li> </ul>	<ul style="list-style-type: none"> <li>- Hiking only takes place in the periphery of the alpine summer holiday- little personal relevance</li> <li>- Don't want to be seen as "strollers" but adventurers</li> <li>- Travel and live with parents and siblings (as adults)</li> <li>- Need alternatives (sports, summer alpine coaster...)</li> </ul>
<b>Landscapes</b>	<ul style="list-style-type: none"> <li>- High alpine terrain</li> <li>- Ascent to the summit</li> </ul>	<ul style="list-style-type: none"> <li>- High alpine terrain</li> <li>- Ascent to summit</li> <li>- Rivers, mountain lakes</li> </ul>	<ul style="list-style-type: none"> <li>- Surrounded by forest</li> <li>- Rivers</li> <li>- Low mountain ranges</li> </ul>	<ul style="list-style-type: none"> <li>- Rivers</li> <li>- Mountain lakes</li> </ul>	<ul style="list-style-type: none"> <li>- High alpine terrain</li> <li>- Ascent to the summit</li> </ul>
<b>Demographics</b>	<ul style="list-style-type: none"> <li>- Older than average hiker</li> <li>- Single and couple households</li> </ul>	<ul style="list-style-type: none"> <li>- Young segment</li> <li>- Male</li> <li>- Urban regions</li> </ul>	<ul style="list-style-type: none"> <li>- More mature</li> <li>- Female</li> <li>- Often already retired</li> </ul>	<ul style="list-style-type: none"> <li>- Female</li> <li>- Young families</li> <li>- 30-39 years old</li> </ul>	<ul style="list-style-type: none"> <li>- Very young</li> <li>- Male</li> </ul>

# Characterization of the segments

# Implications

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- In order to enhance the portfolio for hiking tourism - including country specific communication - the target group of hikers could be analysed in more detail.
- The meaning and demands of hiking vary according to the country of origin.
- Five hiking segments have been identified - with different motives for going on a hiking holiday as well as diverging demands towards their holiday experiences.
- The proportion of these hiking segments varies in the country of origin.
- Depending on the country market, small modifications make sense when addressing a specific hiking segment.

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