

Bulgaria in the international ski market

Round table for the Development of the Winter/Ski tourism

Sofia – 11 February 2016

Agenda

- **The state of the industry today**
- **International flows**
- **Regional focus**

Market metrics

- **Skier** : one person practising ski, snowboard or other downhill slide, independent of the rate of practice.
- **Skier visit** : one person visiting a ski area for all or any part of a day or night for the purpose of skiing, snowboarding, or other downhill sliding. Skier visits include full-day, half-day, night, complimentary, adult, child, season pass and any other type of ticket that gives a skier/snowboarder the use of an area's facilities.

Laurent Vanat

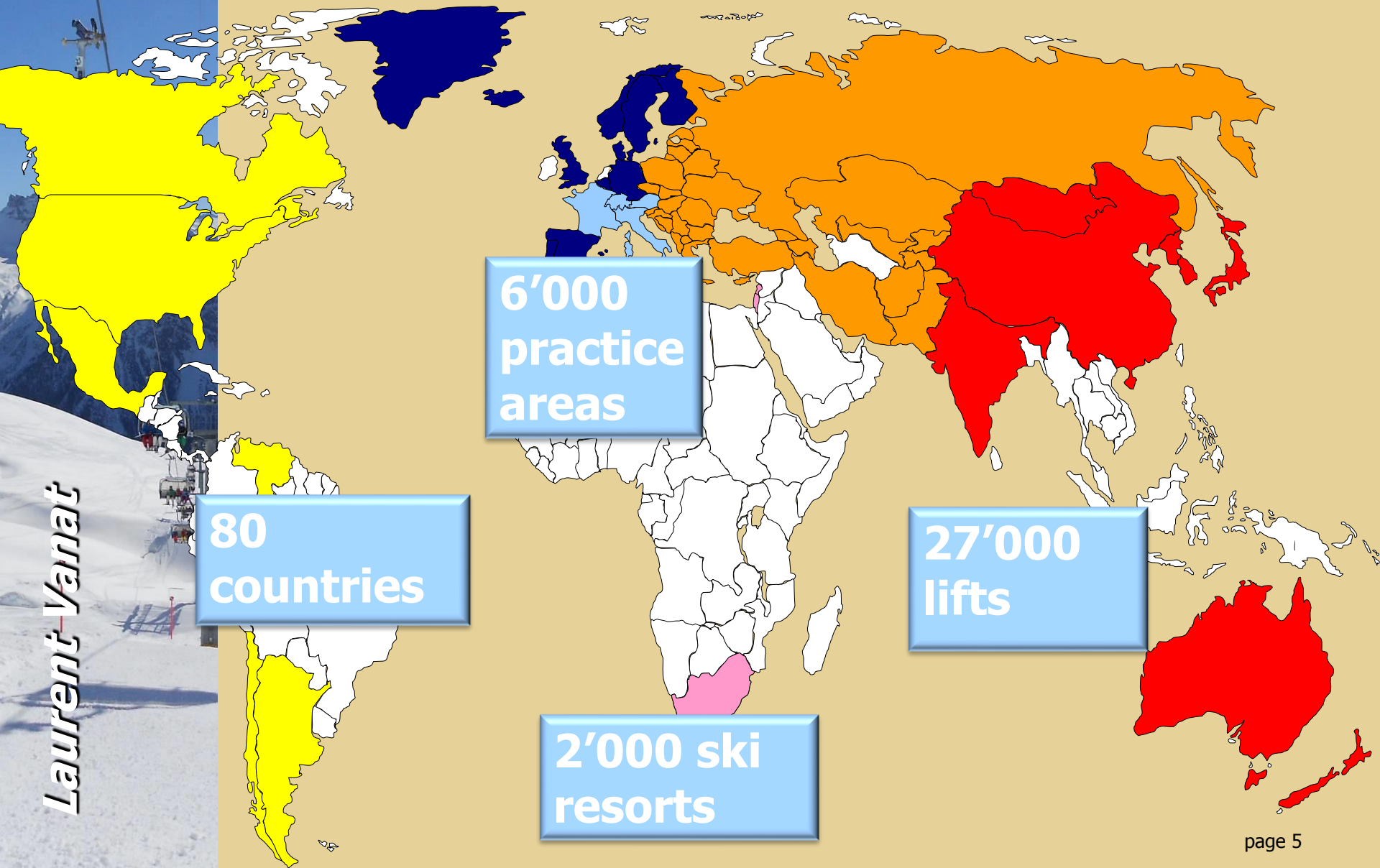


The state of the industry today

Laurent Vanat



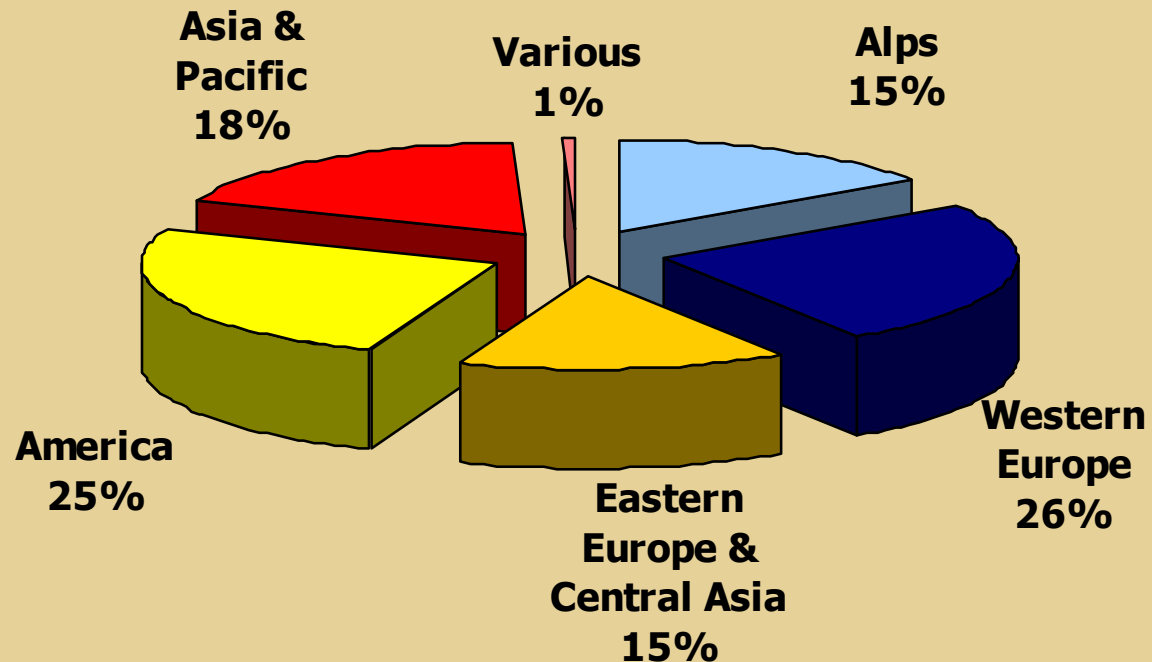
The world ski market



Laurent Vanat

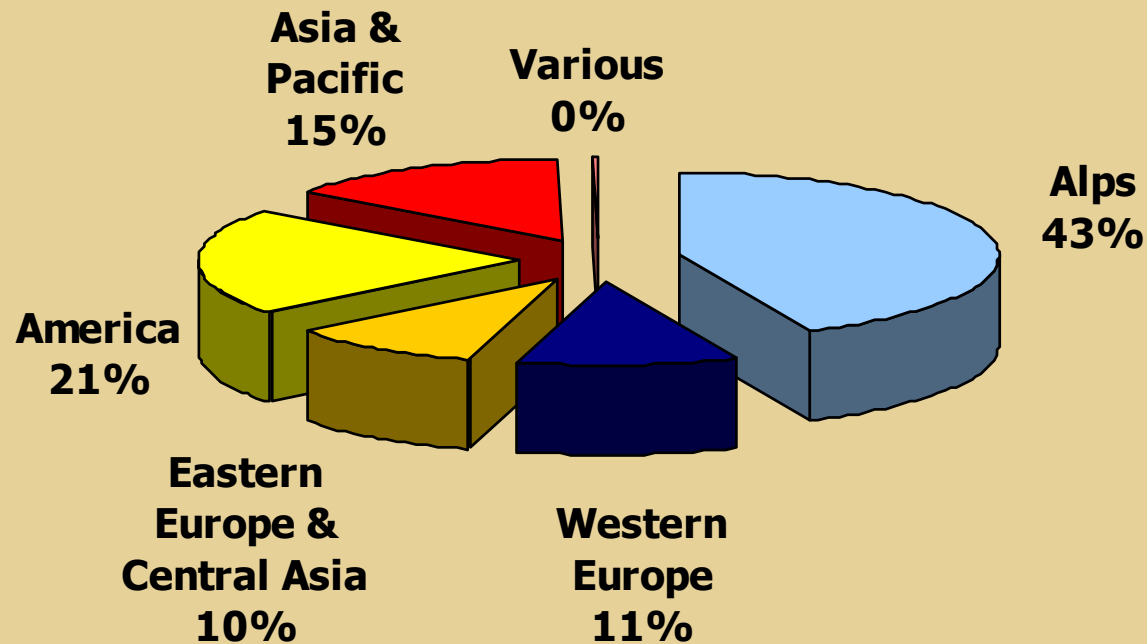
Who are the skiers ?

- Spread of the skiers upon country of origin (**125 million skiers** estimated worldwide)

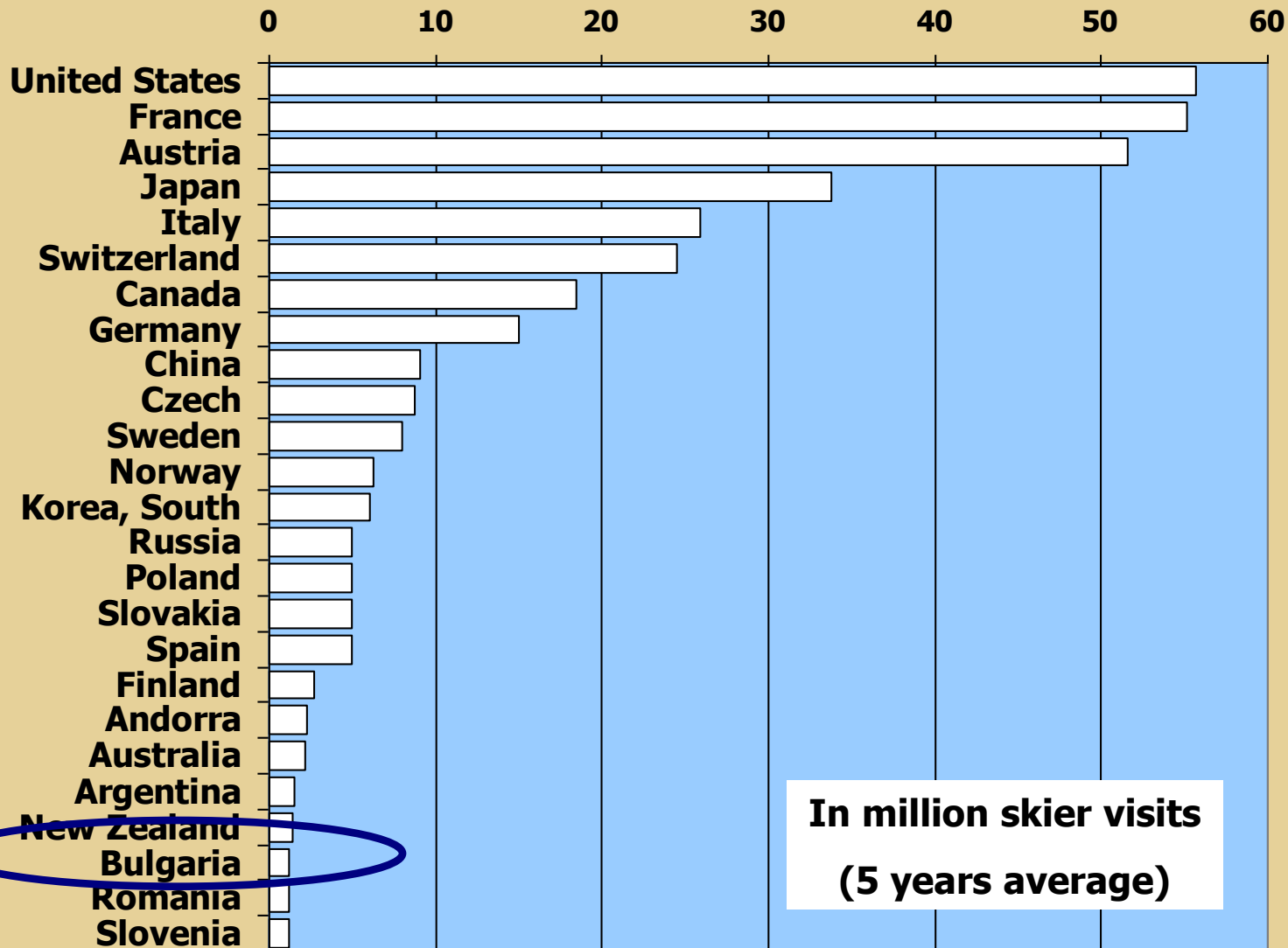


Where do they ski ?

- Market share in the worldwide skier visits (**400 million yearly skier visits**)



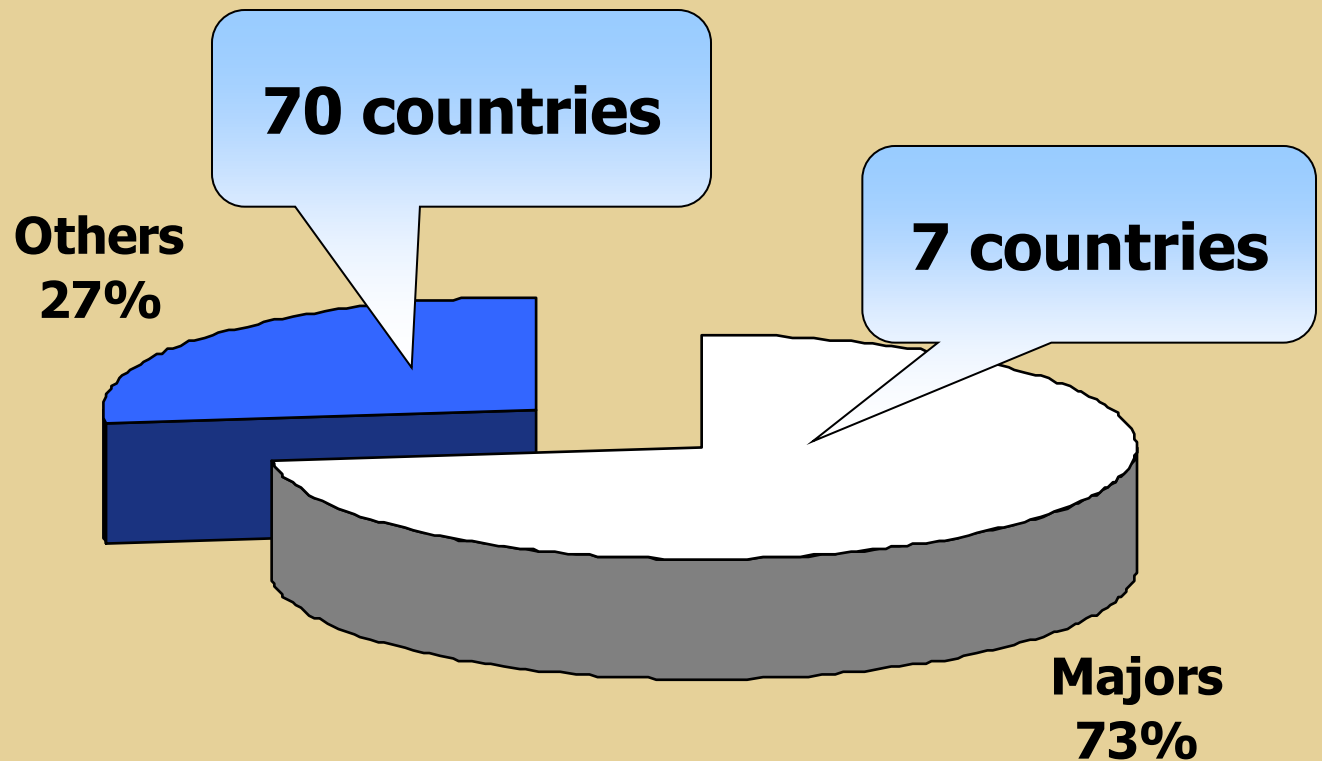
Top 25 markets



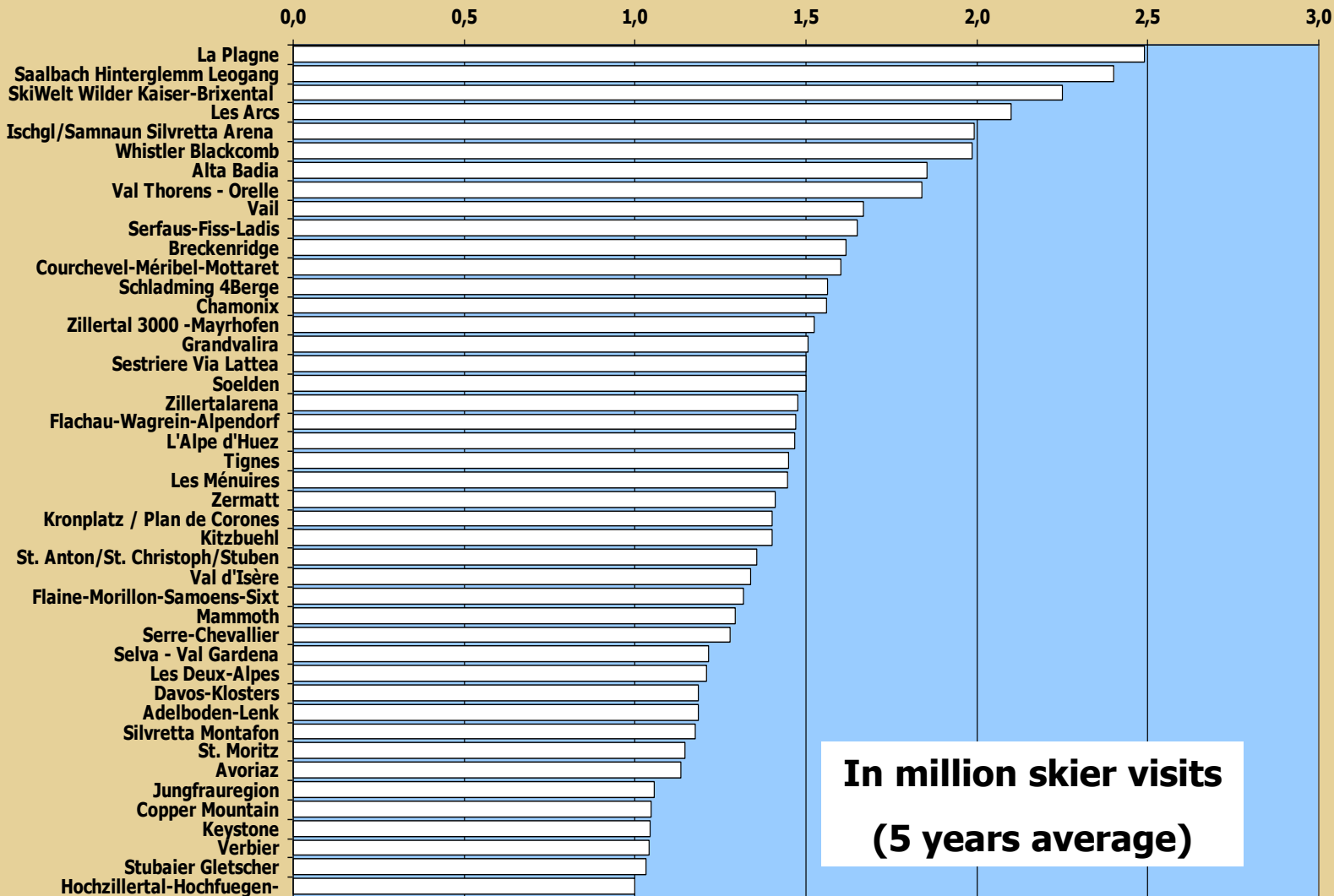
Laurent Vanat

Major players (countries)

- A limited number of countries concentrate most of the attendance

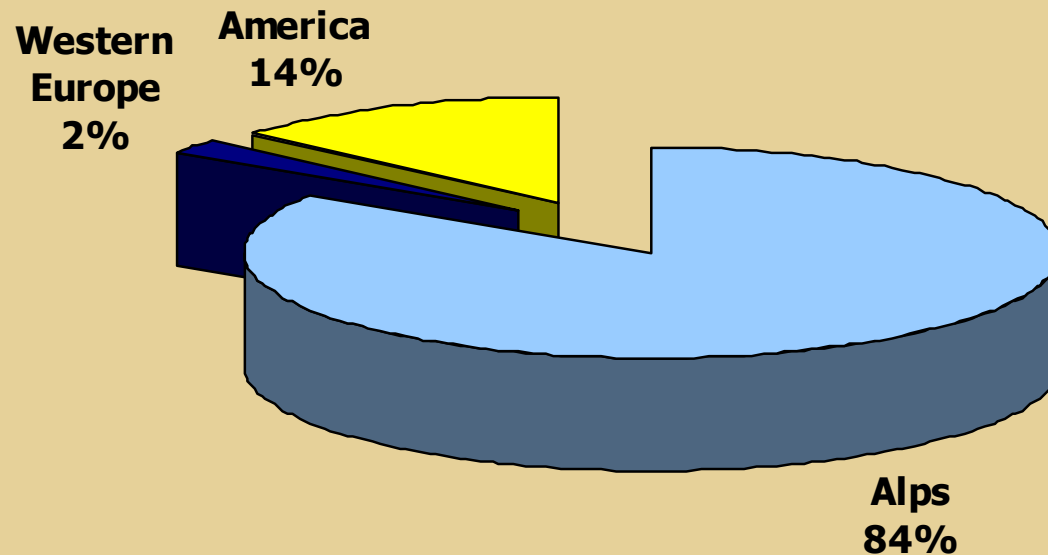


Top 50 (> 1 mio skier visits)



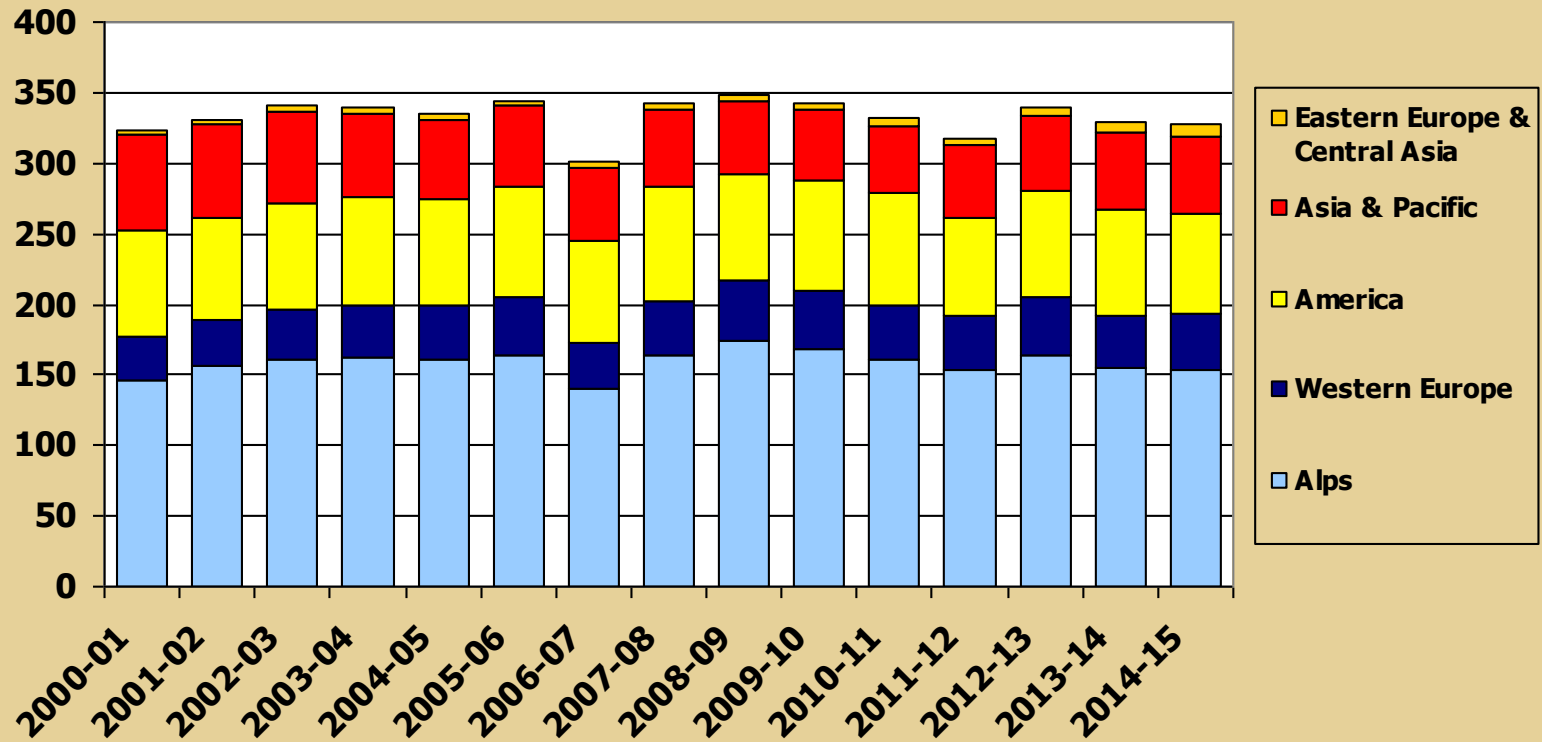
Top 50 resorts

- 37 of the largest ski resorts are located in the Alps



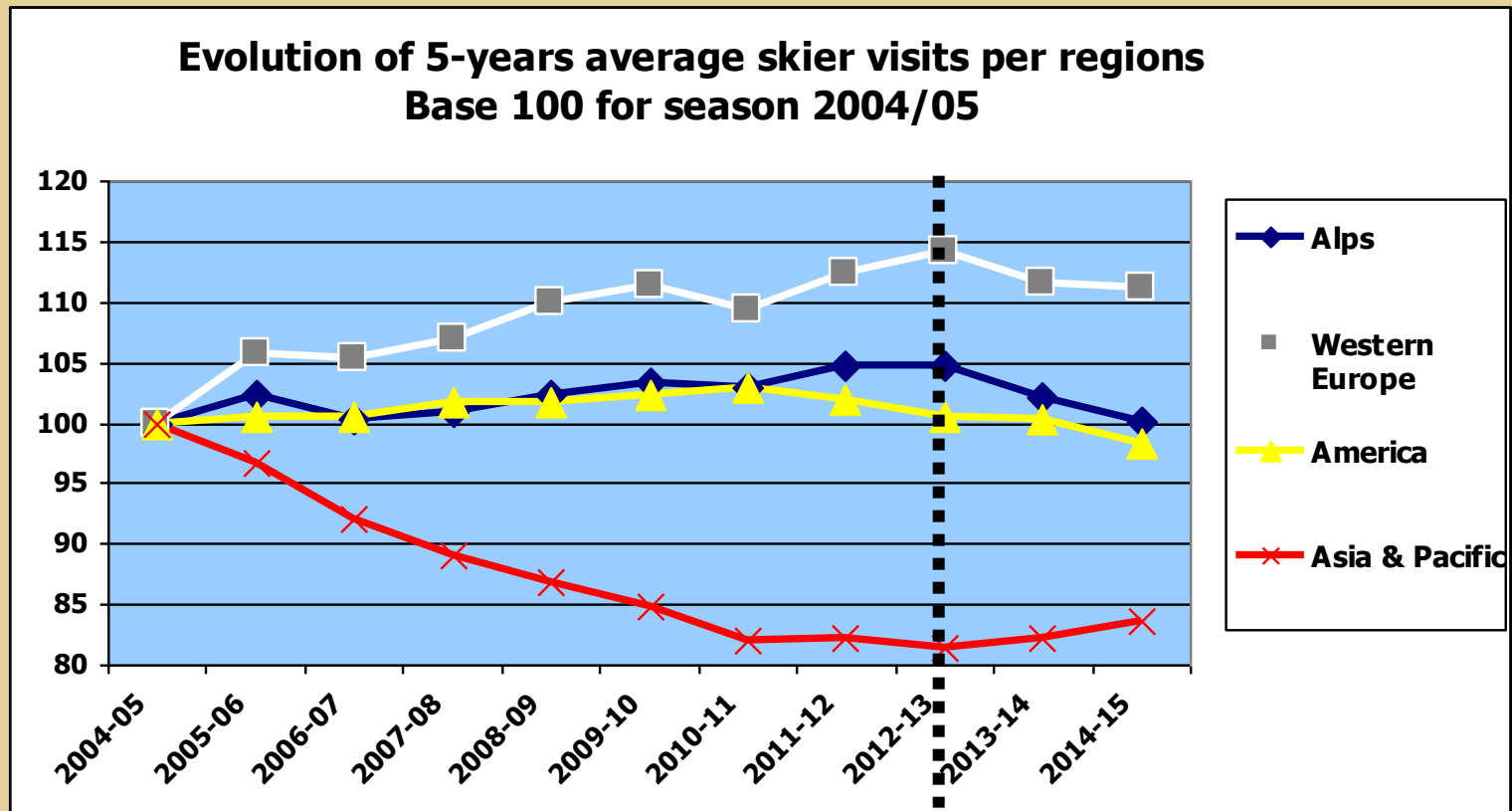
World evolution

Skier visits per regions (mio)



Regional evolution

- General inflection point in 2012/13



Why this opposite inflexion ?

- Mature stage of the industry in Europe
 - Aging and stagnating population, baby-boomers retiring
 - Failure to gain new skiers
 - Increasing competing activities
 - Few innovation
 - Inability to develop the 4-season activity
 - Weak marketing
- Developing / redeveloping stage in Asia
 - Young generations
 - Sport becoming fashionable
 - Japan seems to enter into a recovery phase

International skiers flows

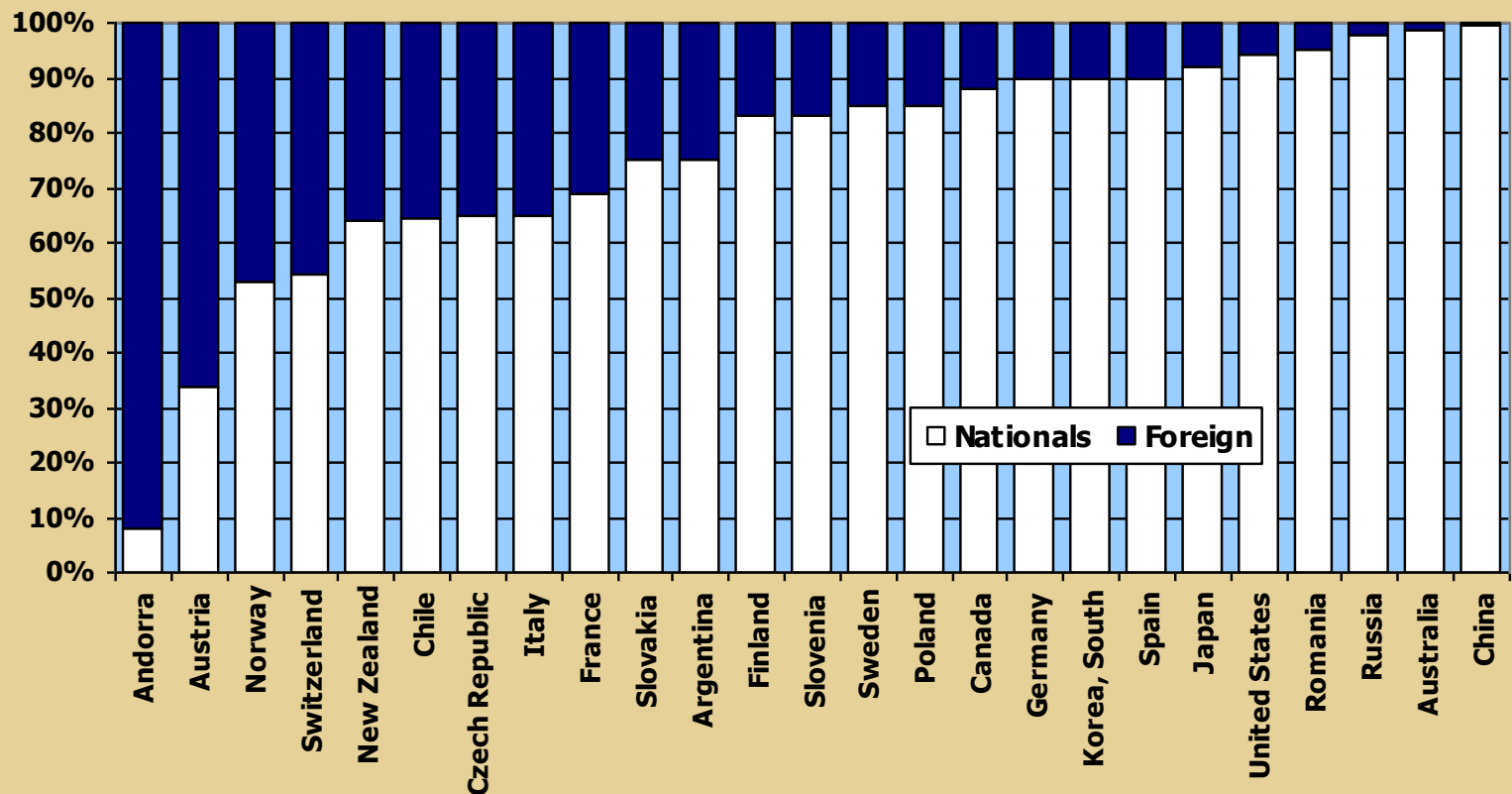
Laurent Vanat



National skiers

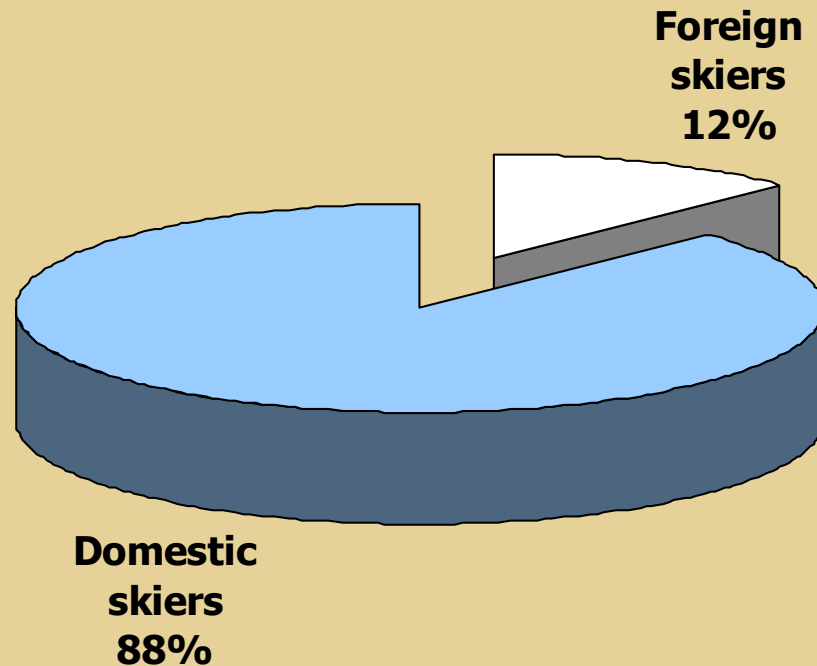
- The **national customer base** is very strong in most of the big players. Foreign visitors concentrate on a few top international resorts.

Proportion foreign skiers



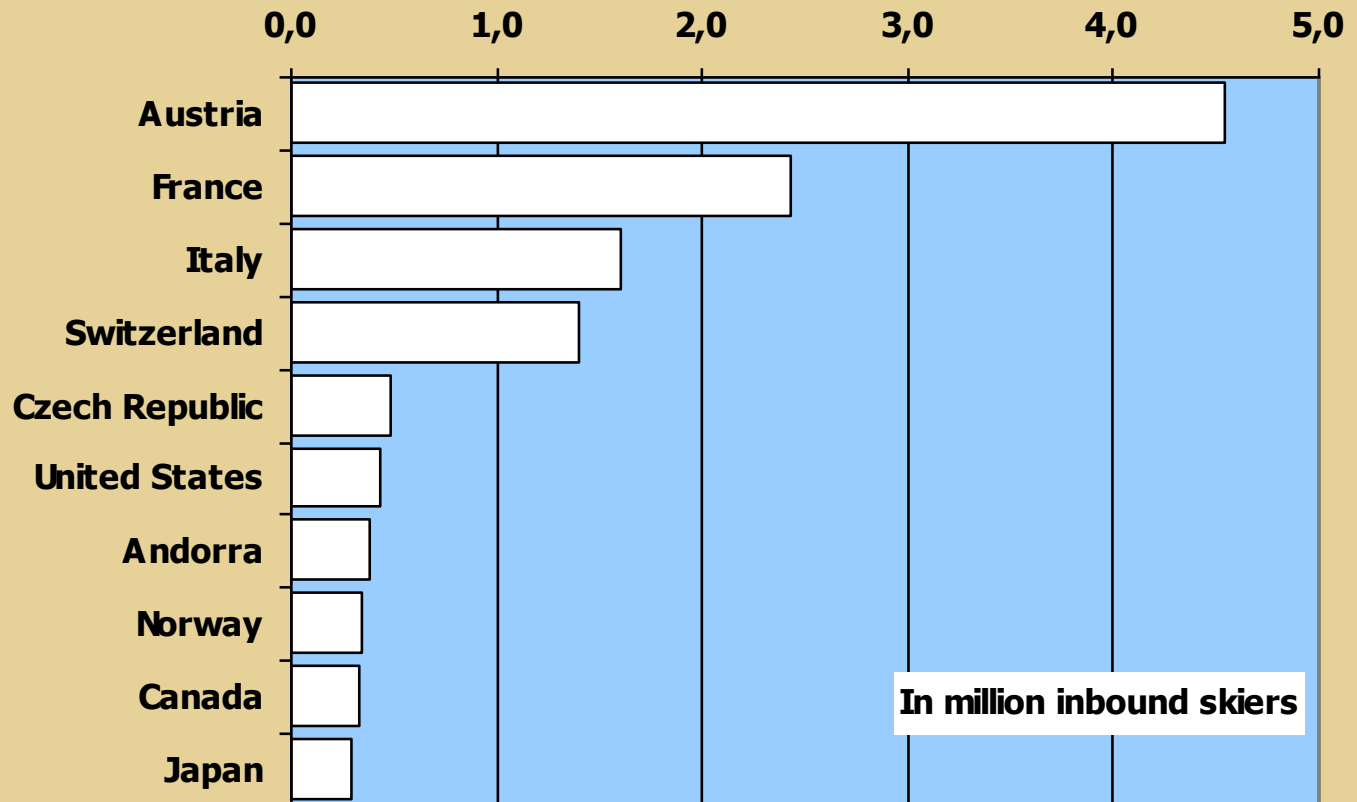
National vs international

- Worldwide, in a global perspective, the share of foreign visitors in the **number of skiers** is less than 1/8 of total participants (on an estimated 125 millions skiers worldwide).



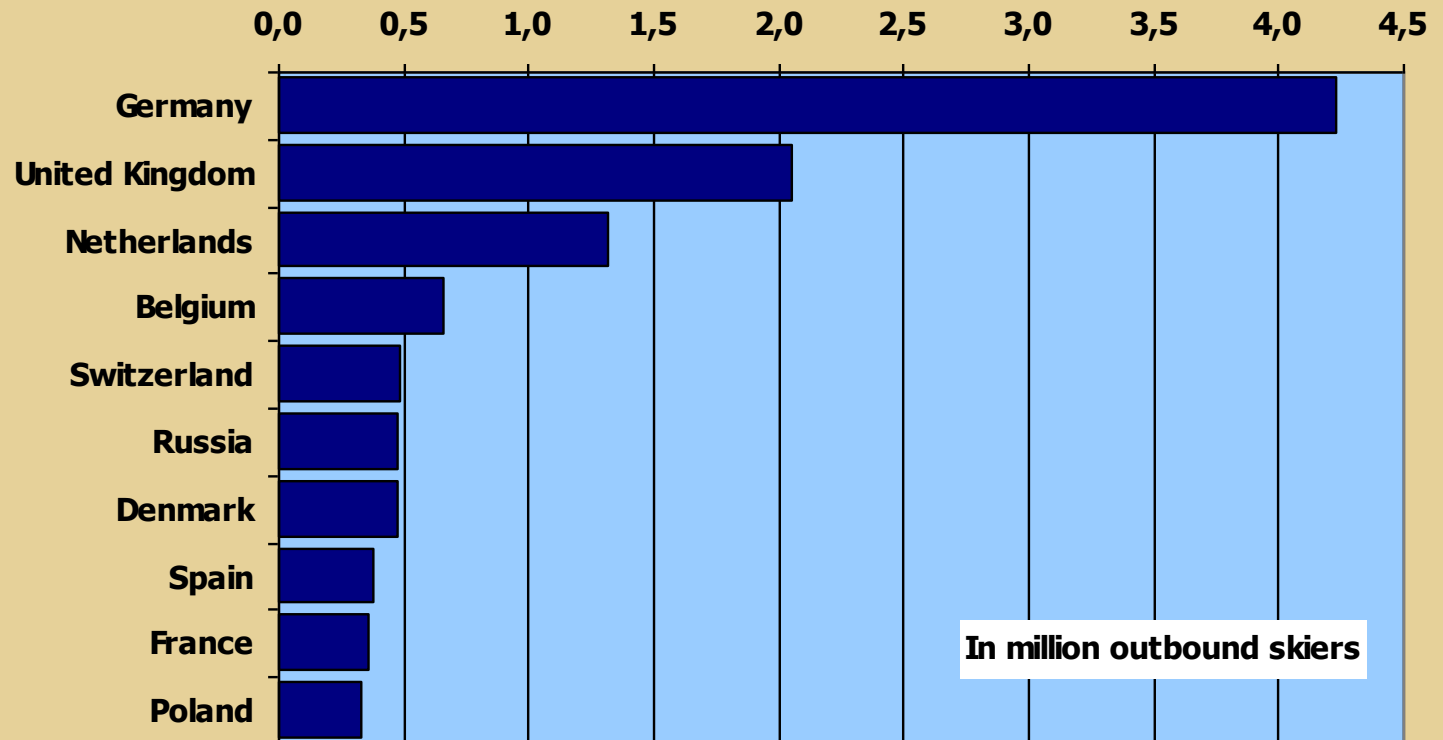
Top 10 inbound markets

- Few big players; ski is mostly a domestic market !



Top 10 outbound markets

- Only 2 big providers; issue of markets' ski culture

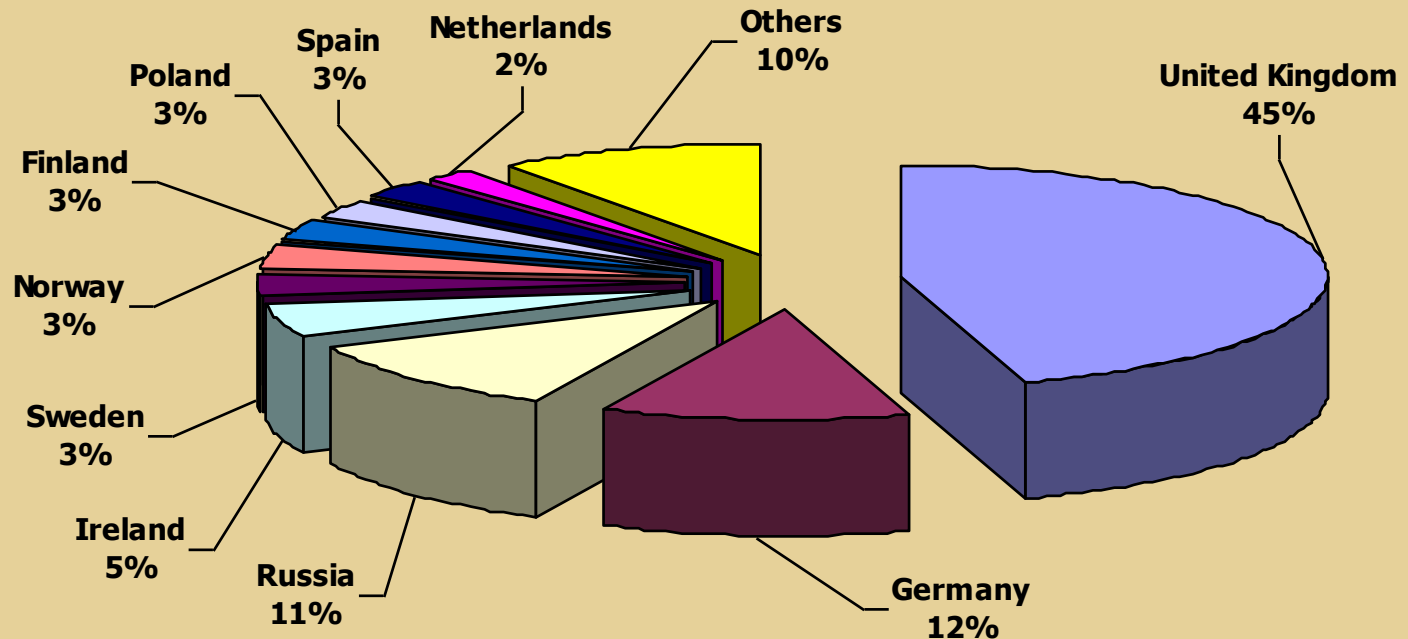


Ski air traffic - outbound



- Global volume about 3 million PAX / winter

Estimated ski PAX based on country of origin (outbound)

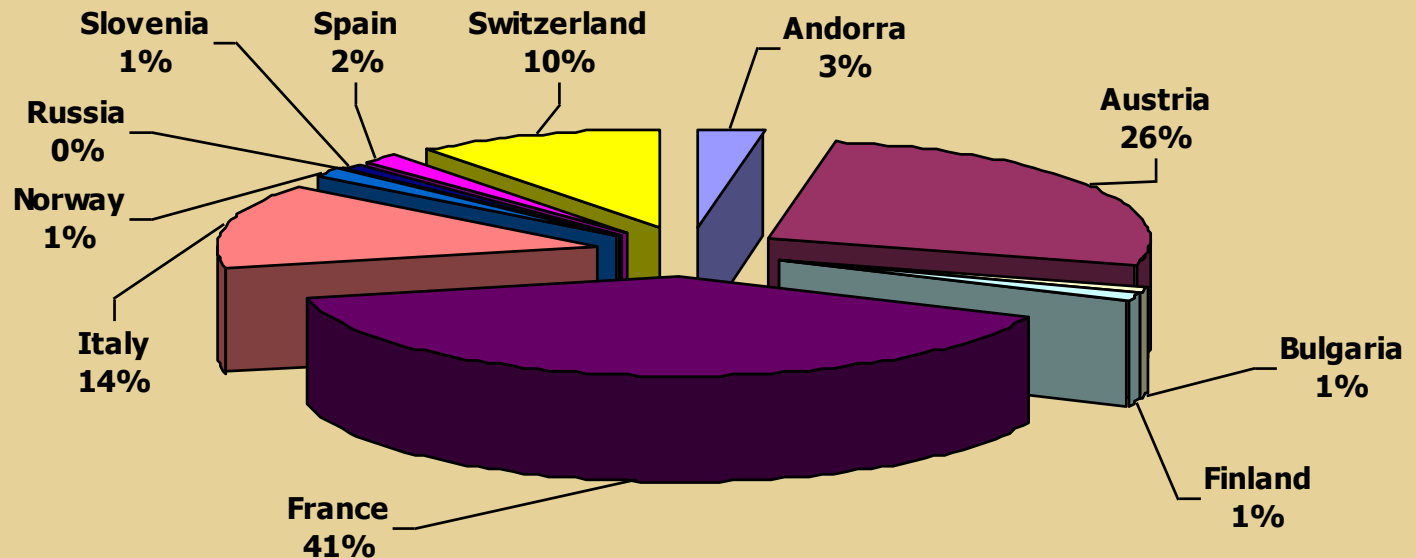


Ski air traffic - inbound



- Global volume about 3 million PAX / winter

Estimated ski PAX based on country of destination (inbound)



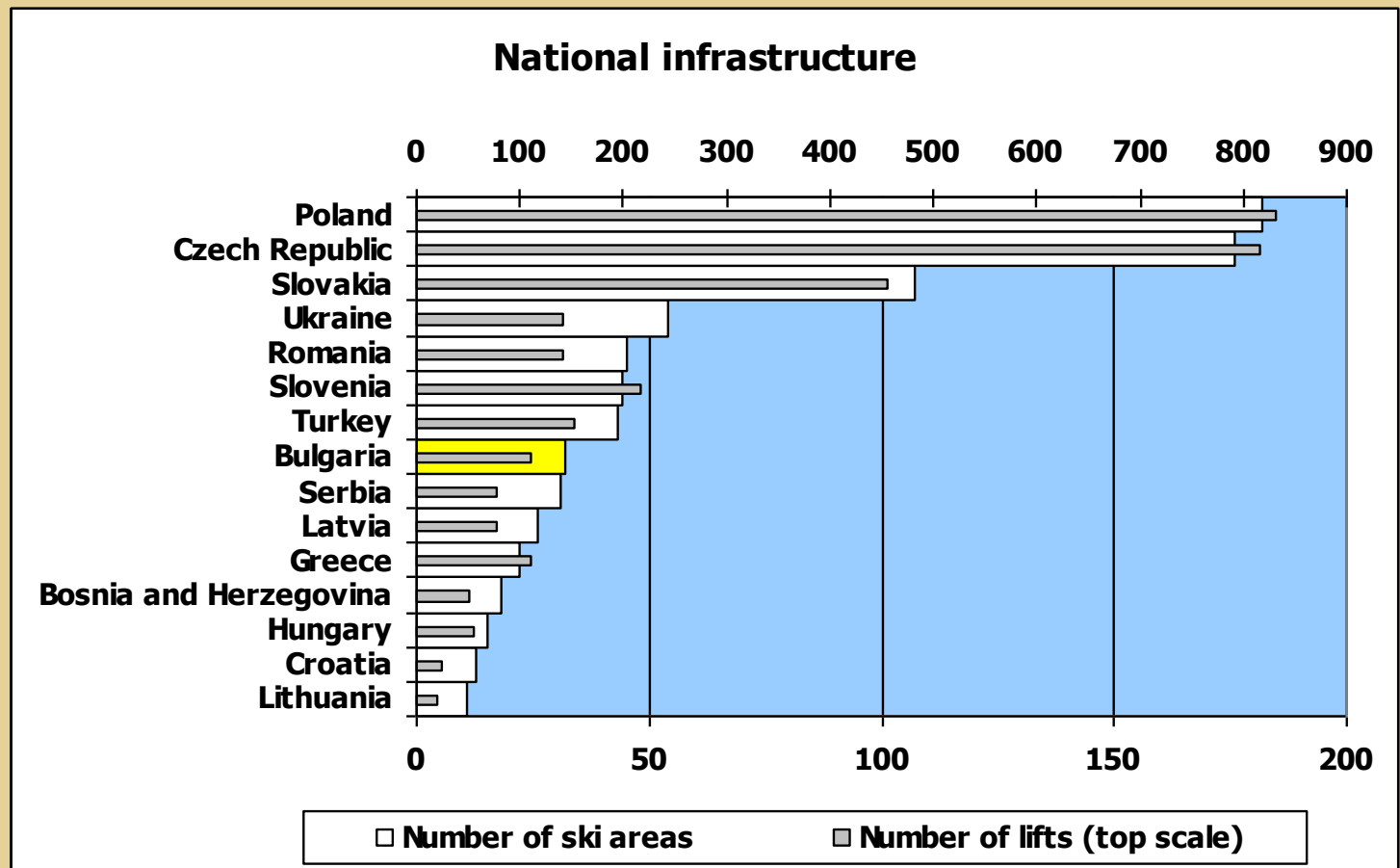
Regional focus

Laurent Vanat



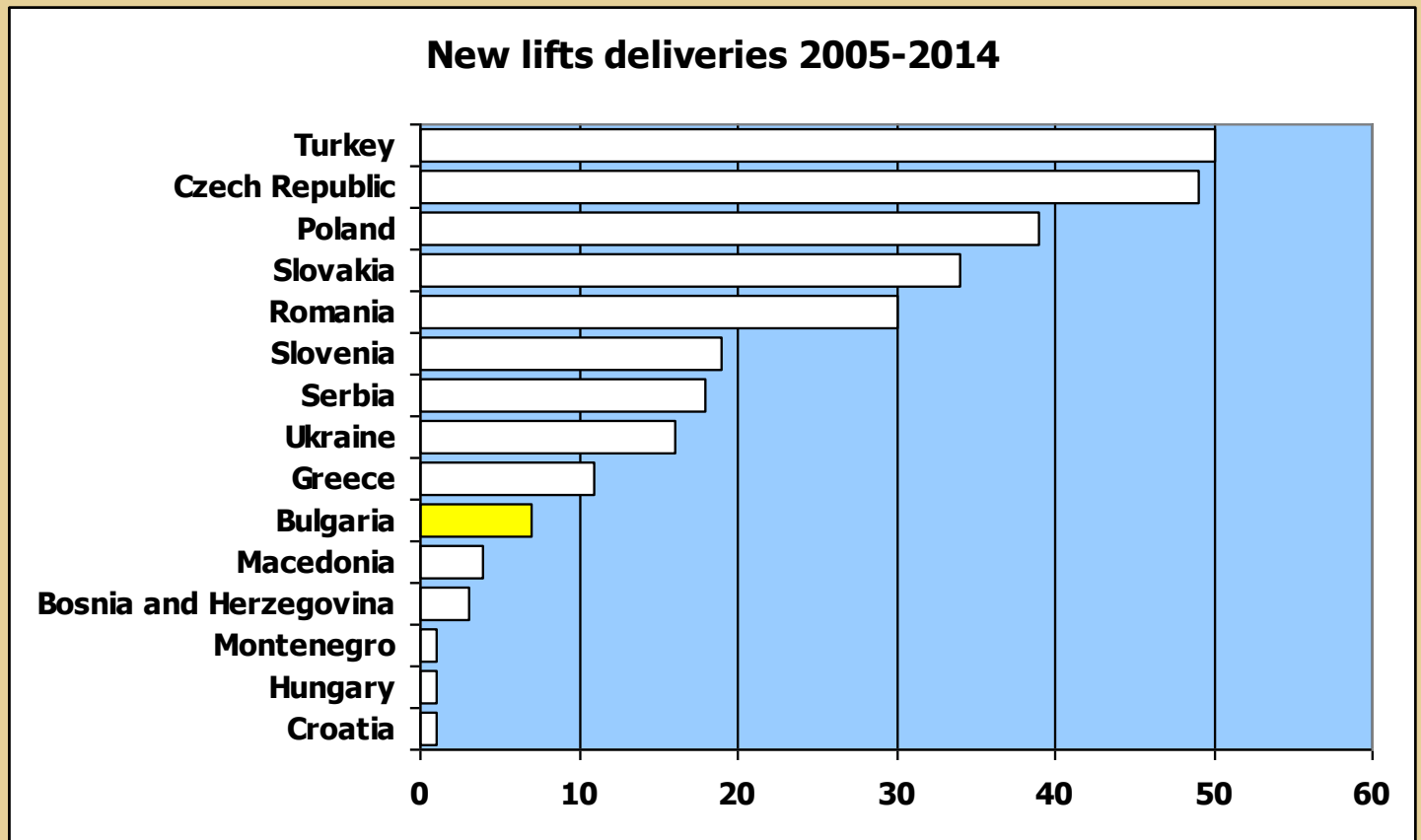
Existing infrastructures

- Poland and Czech Republic are the most equipped



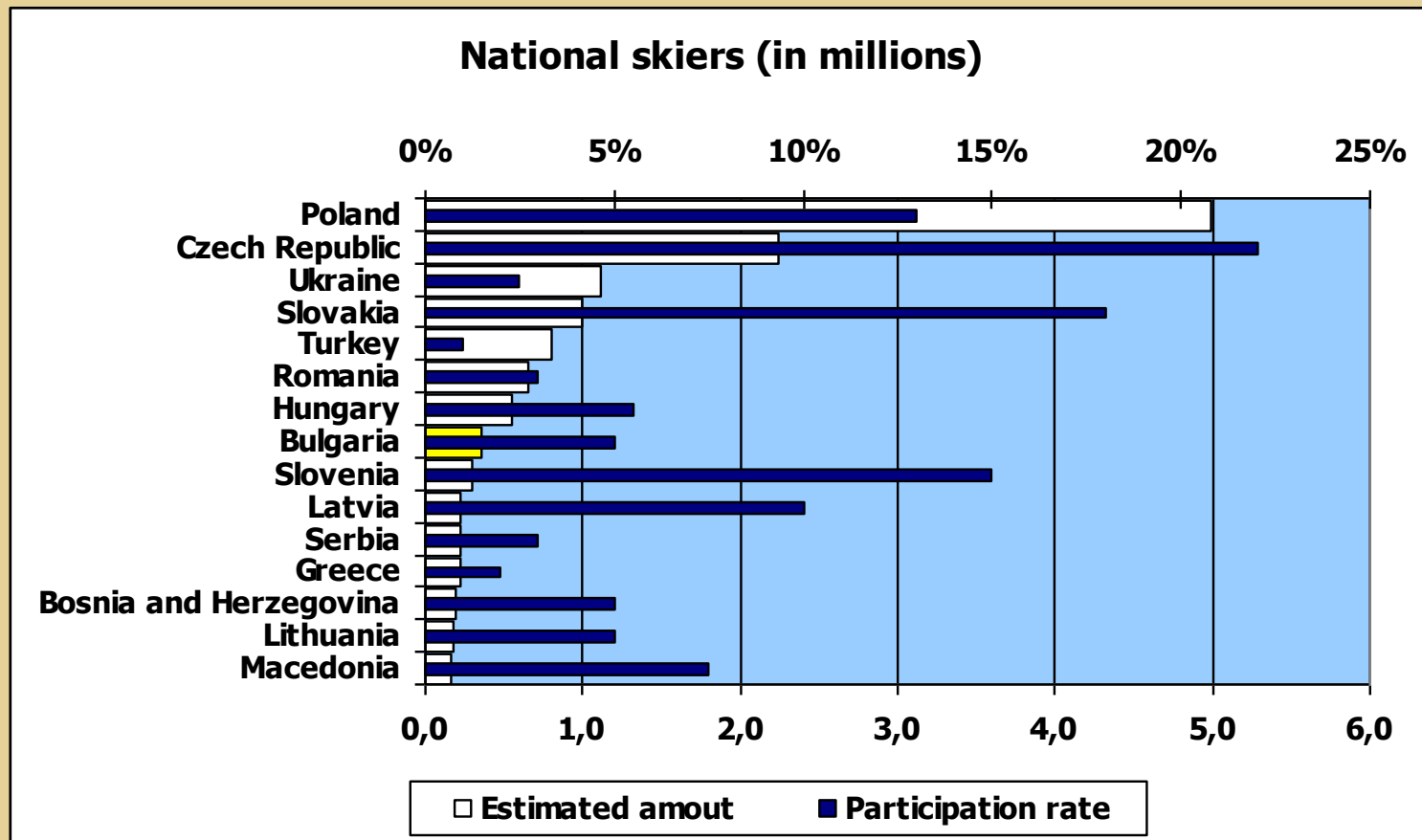
Developing infrastructures

- Turkey and Czech Republic highly investing



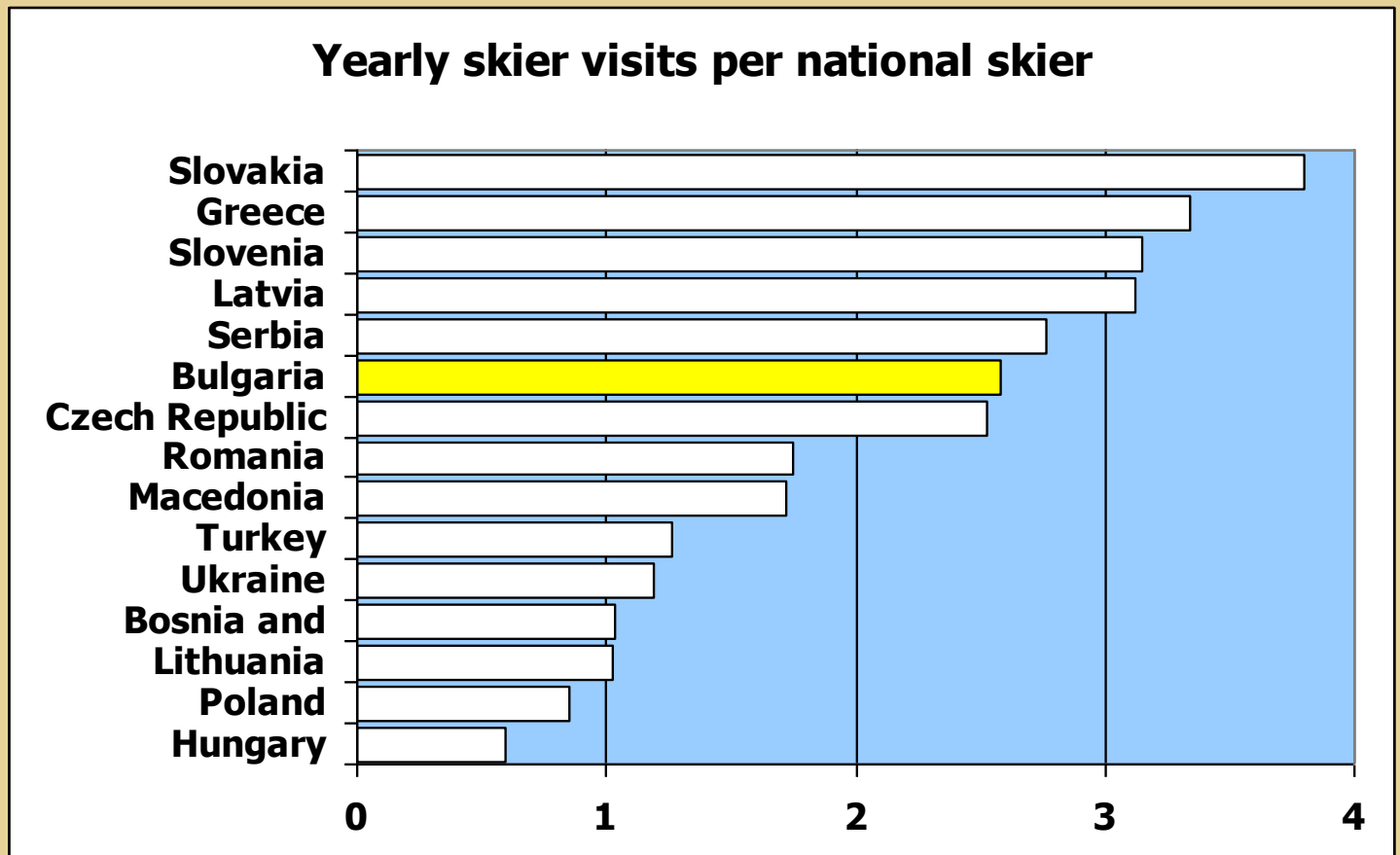
Participants

- Issue in many markets : low ski culture



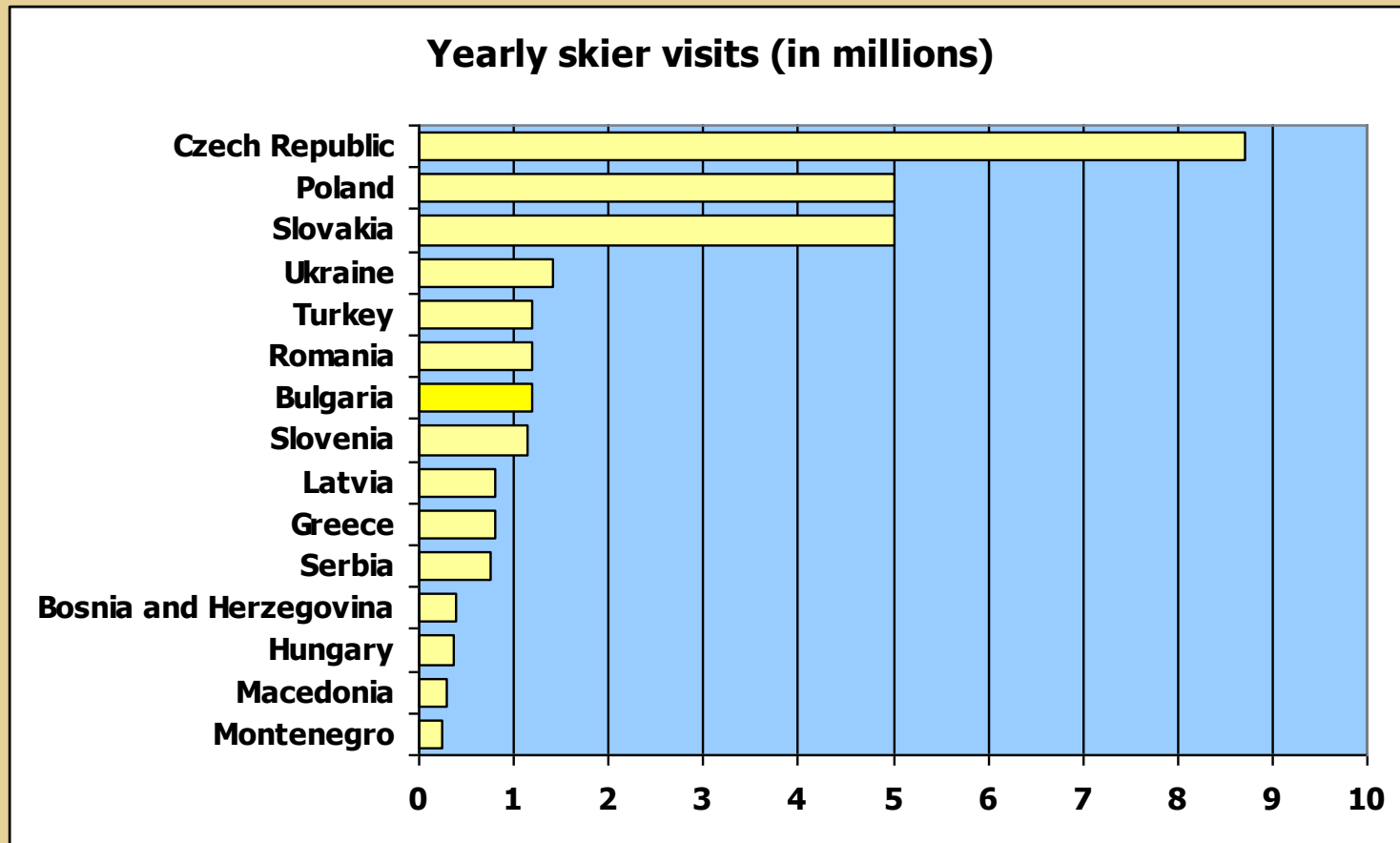
Participants

- Average loyalty to the sport not very high



Attendance

- Most countries have still limited attendance



Conclusion



Future prospects

- The European supply market is flattening
- Most markets are and will remain domestic
- **The challenge is to gain and retain local skiers**
- **Prospective 2020 : 420 mio skier visits**

For further reference

Available from

- **www.vanat.ch**
page *Publications*





Laurent Vanat
19, Margelle
CH - 1224 Geneva
Tel / voicemail : +4122 349 8440
E-mail : vanat@vanat.ch
Website : www.vanat.ch

Laurent Vanat