Bulgaria in the international ski market

Round table for the Development of the Winter/Ski tourism

Sofia – 11 February 2016

LV/25/03/2016



Agenda

The state of the industry today

International flows

Regional focus



Market metrics

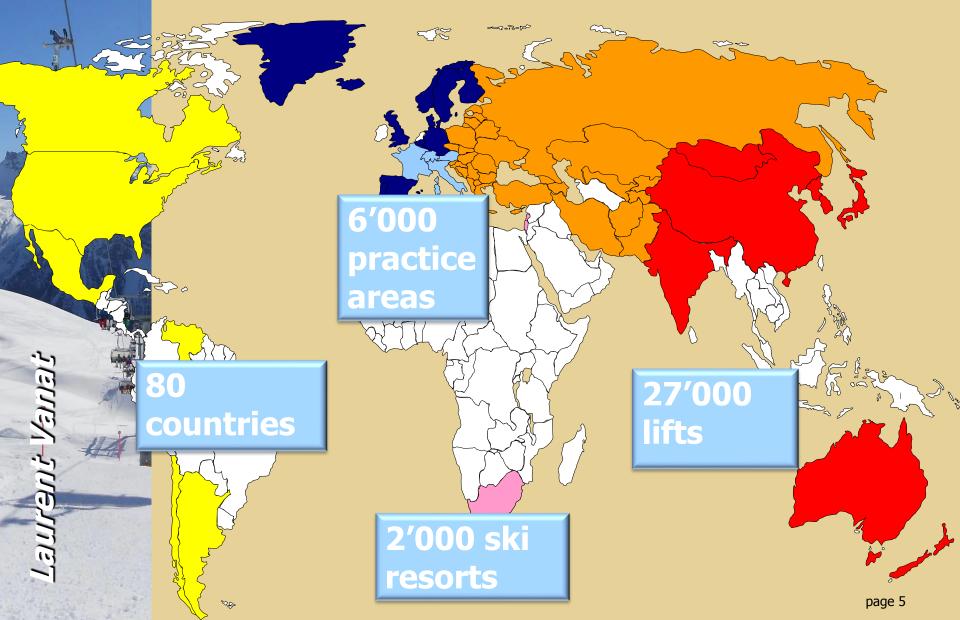
- **Skier** : one person practising ski, snowboard or other downhill slide, independent of the rate of practice.
- Skier visit : one person visiting a ski area for all or any part of a day or night for the purpose of skiing, snowboarding, or other downhill sliding. Skier visits include full-day, half-day,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



The state of the industry today

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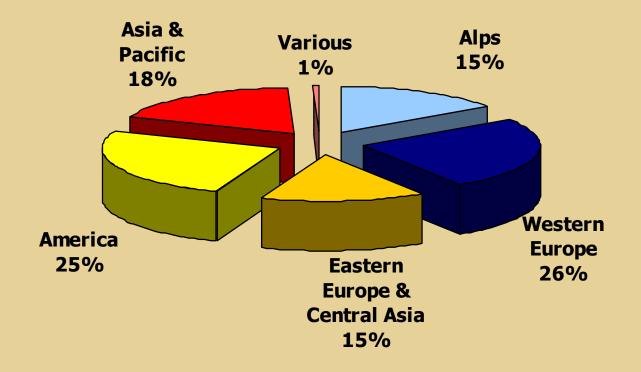
The world ski market



Who are the skiers ?

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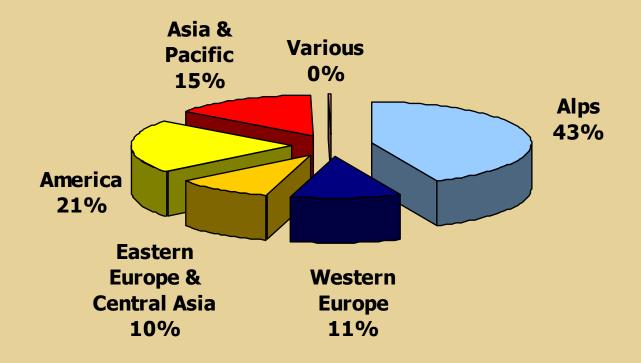
 Spread of the skiers upon country of origin (125 million skiers estimated worldwide)



Where do they ski ?

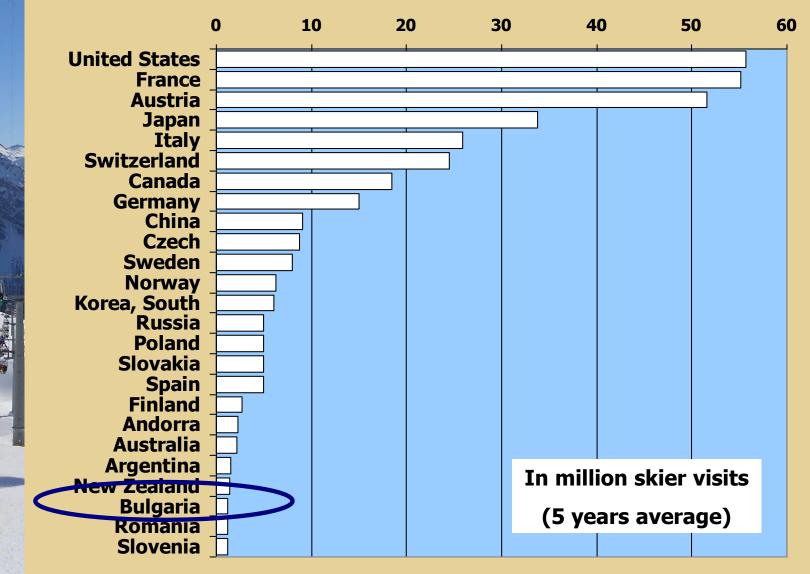
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Market share in the worldwide skier visits (400 million yearly skier visits)



Top 25 markets

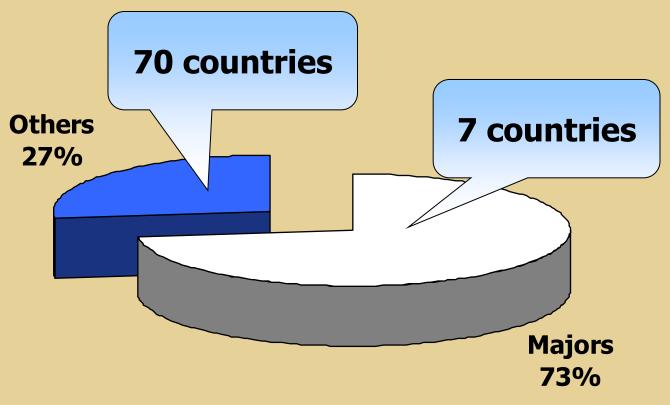
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Major players (countries)

A limited number of countries concentrate most of the attendance



Top 50 (> 1 mio skier visits)

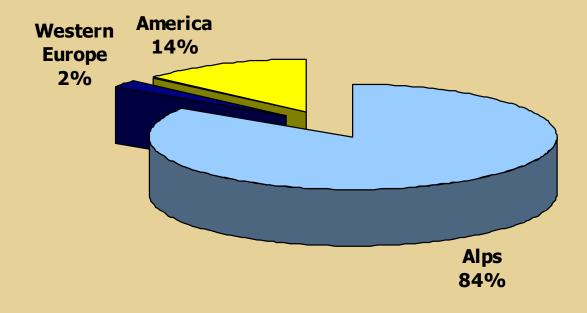
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| | Les Arcs | | | | | | |
| | Ischgl/Samnaun Silvretta Arena | | | | | | |
| | Whistler Blackcomb Alta Badia | | | | _ | J | |
| | Val Thorens - Orelle | | | I | | | |
| - | Vail | | I | | | | |
| N. | Serfaus-Fiss-Ladis | - | I | I | | | |
| | Breckenridge Courchevel-Méribel-Mottaret | | | | | | |
| | Schladming 4Berge | | | | | | |
| | Chamonix | _ | | | | | |
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| | Flachau-Wagrein-Alpendorf L'Alpe d'Huez | | 1 | I | | | |
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| ST. | Zermatt | | | | | | |
| | Kronplatz / Plan de Corones Kitzbuehl | | | | | | |
| | St. Anton/St. Christoph/Stuben | | | | | | |
| | Val d'Isère | | | | | | |
| | Flaine-Morillon-Samoens-Sixt | | I | | | | |
| 10 | Mammoth Serre-Chevallier | | | | | | |
| | Selva - Val Gardena | | | | | | |
| | Les Deux-Alpes | | | | | | |
| 1 | Davos-Klosters Adelboden-Lenk | | | | | | |
| - | Silvretta Montafon | | | | | | |
| | St. Moritz | - | | | | | |
| - | Avoriaz | | | | In milli | on skier v | visits |
| | Jungfrauregion | | 1 | | | | |
| | Copper Mountain Keystone | | | | / | | |
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Top 50 resorts

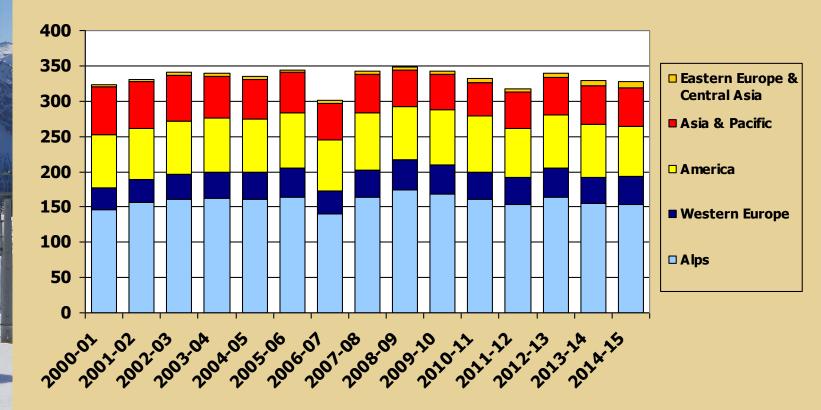
• 37 of the largest ski resorts are located in the Alps





World evolution

Skier visits per regions (mio)

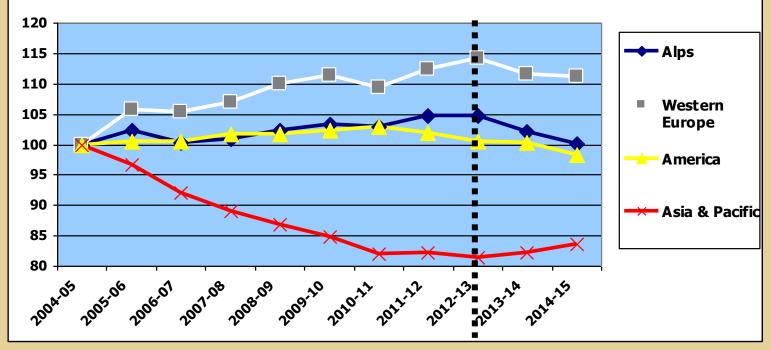




Regional evolution

• General inflection point in 2012/13

Evolution of 5-years average skier visits per regions Base 100 for season 2004/05



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

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- Sport becoming fashionable
- Japan seems to enter into a recovery phase

International skies flows

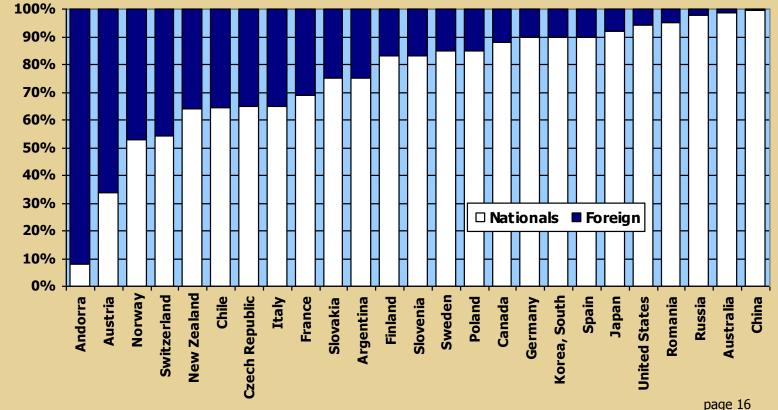
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National skiers

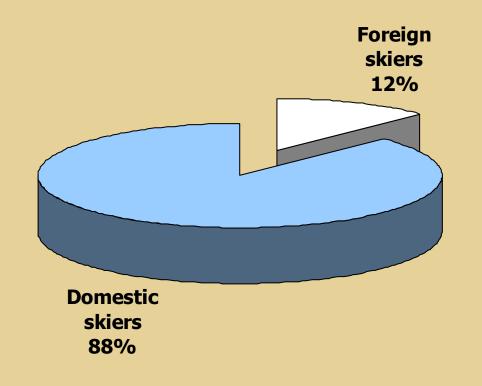
• The **national customer base** is very strong in most of the big players. Foreign visitors concentrate on a few top international resorts.



Proportion foreign skiers



 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).

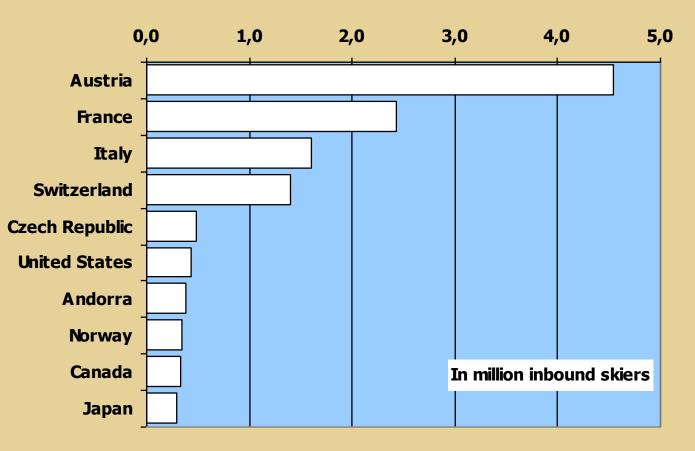


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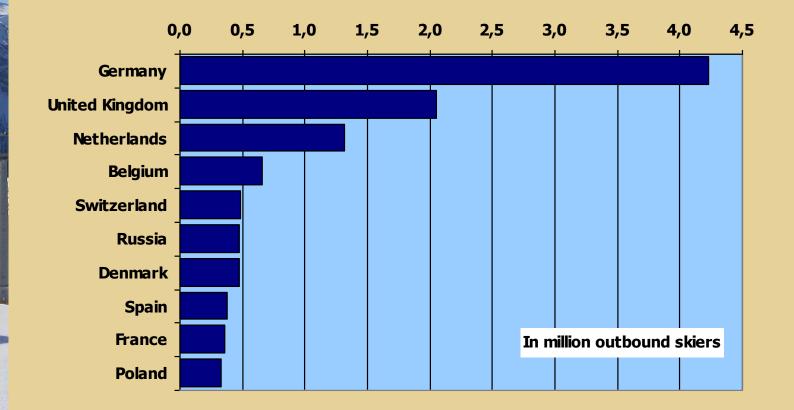
Top 10 inbound markets

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



Top 10 outbound markets

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



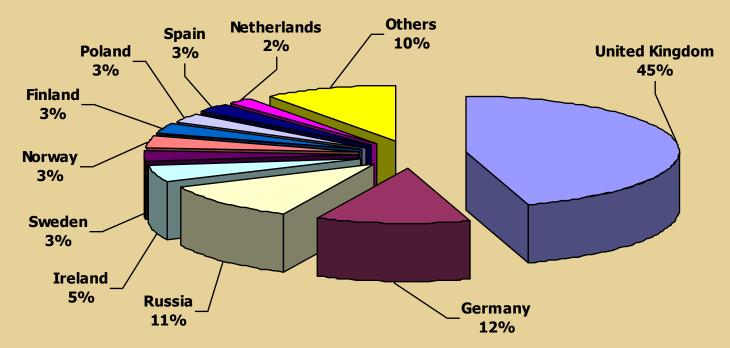
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Ski air traffic - outbound 🚩

Global volume about 3 million PAX / winter

Estimated ski PAX based on country of origin (outbound)



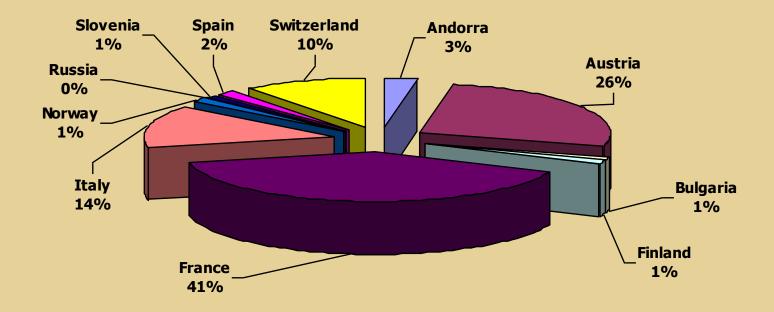


Ski air traffic - inbound



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Estimated ski PAX based on country of destination (inbound)



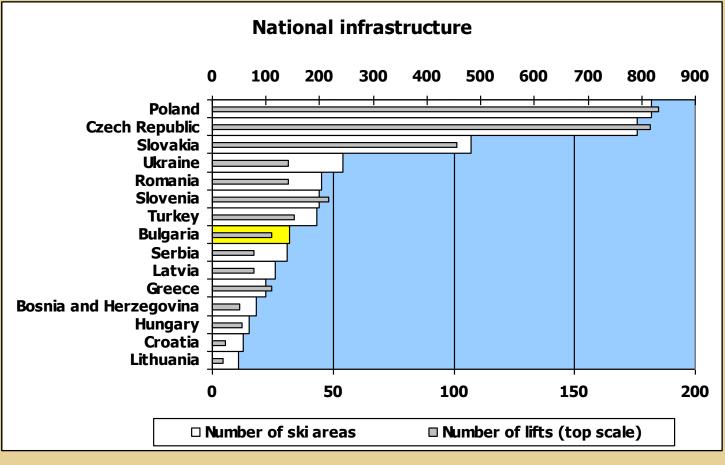


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Existing infrastructures

Poland and Czech Republic are the most equipped

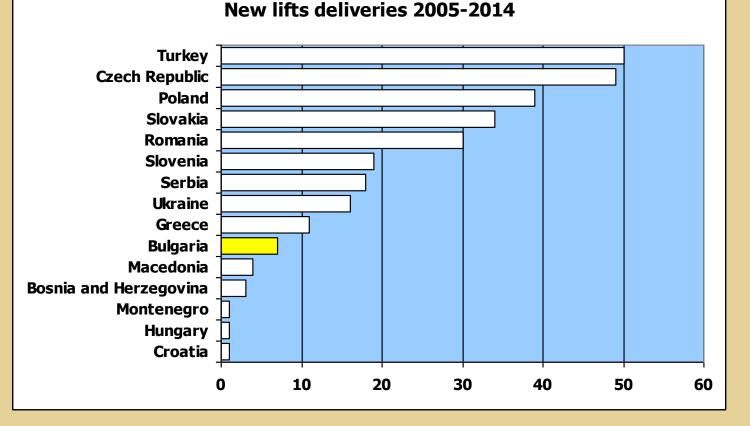


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Developing infrastructures

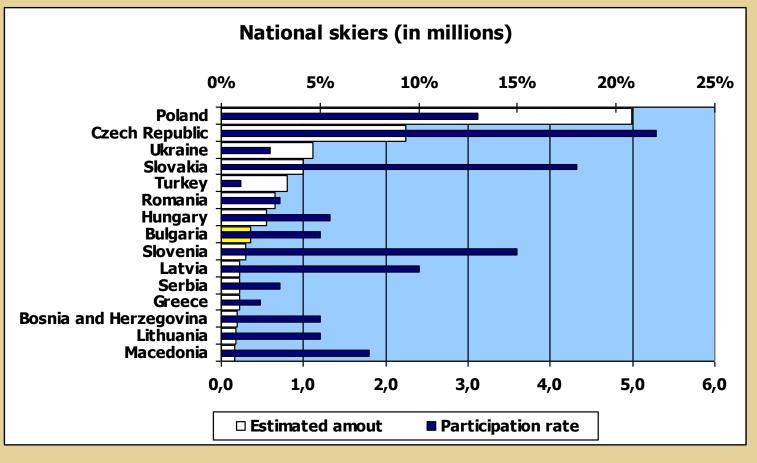
Turkey and Czech Republic highly investing





Participants

• Issue in many markets : low ski culture

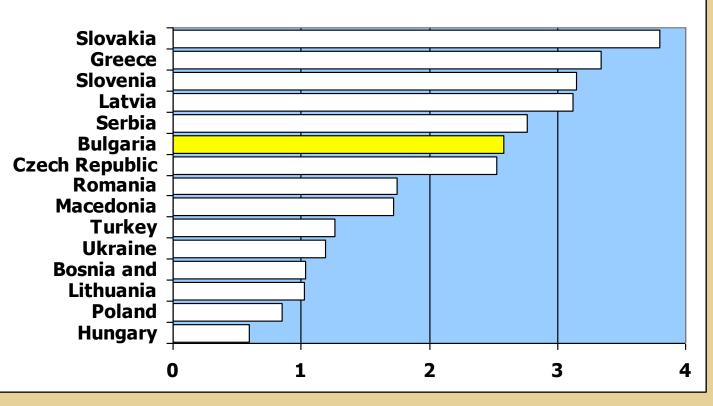




Participants

Average loyalty to the sport not very high

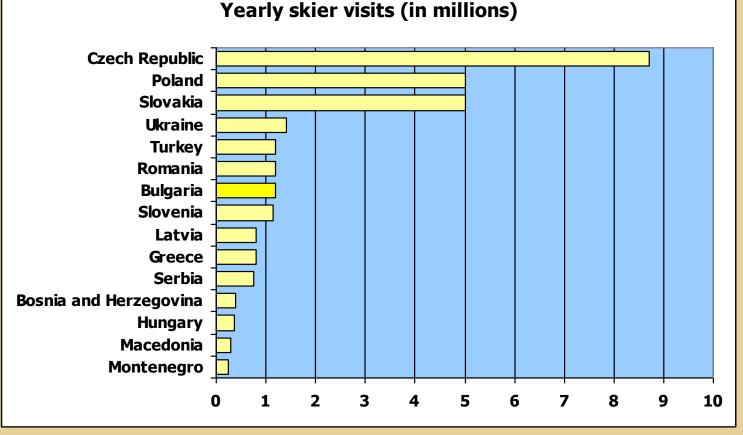
Yearly skier visits per national skier

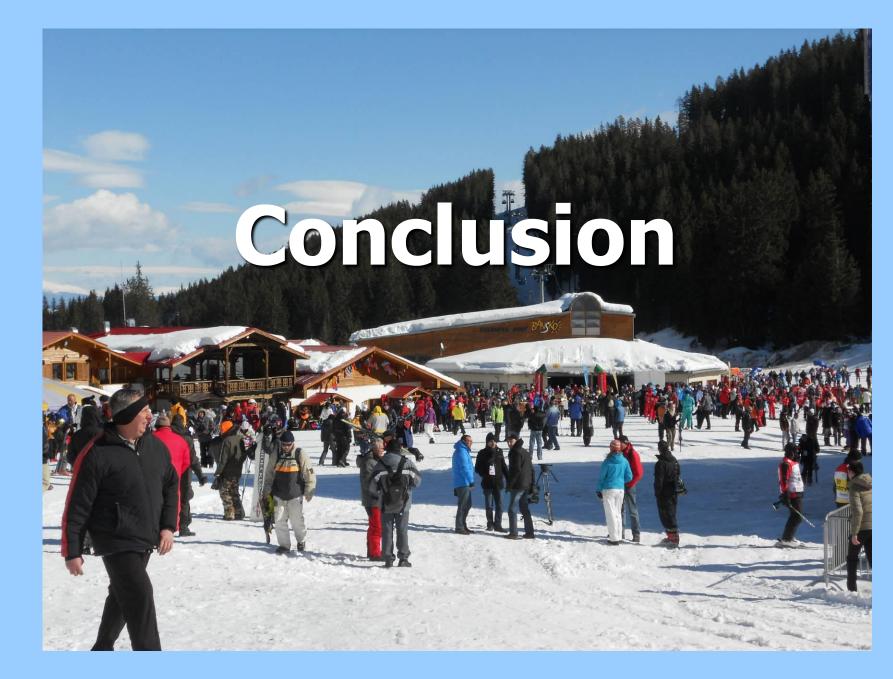




Attendance

Most countries have still limited attendance





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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 Consultant 19, Margelle CH-1224 Genève CH-1224 Genève (+41) 022 349 84 40 Courrie : Matadiavanat ch Internet : Wata vanat ch

> 2015 International Report on Snow & Mountain Tourism

Overview of the key industry figures for ski resorts





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