



MORE THAN JUST SKIING

*THE CHANGING FACE OF A SKI HOLIDAY
WINTER 2015/16*

A report commissioned on behalf of Club Med

Club Med 

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INTRODUCTION

Welcome to Club Med's third ski report.

The result of a series of in-depth questionnaires, online surveys and customer feedback, this season's ski report reveals a winter holiday market that is rapidly adapting to cater for families that are increasingly looking to do more than just ski and snowboard on holiday.

From Cross-Country Skiing to Bobsleighting, Dog Sledding and Rock Climbing the report delves into the growing variety of non-ski pursuits that winter holidaymakers are demanding.

Despite the lure of the mountains, the findings also reveal that this

trend isn't limited to outdoor activities, with the availability of spa treatments and dedicated fitness facilities increasingly impacting on winter holiday makers' choices.

As increasing numbers of non-skiers take to the mountains the report explores concerns among skiers and boarders about etiquette on the slopes as well as the impact on the cost of ski resort based holidays.

Popular and emerging destinations are explored, with Asia increasingly being considered as a potential destination in 2016 and beyond.



Estelle Giraudeau
Managing Director, Club Med
United Kingdom, Ireland and Scandinavia

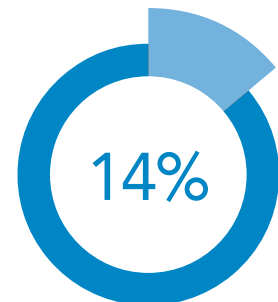


Following the success of the last two ski reports, we're excited to be launching our third ski report looking into the industry appetite for winter ski and snowboard holidays. Club Med continues to be a market leader in all-inclusive premium ski holidays. 2015 has been an exciting year for the Club Med UK business, and with our customers increasingly looking for more than just a skiing holiday, we've looked to ensure our all-inclusive offering adapts to the needs of our clients."

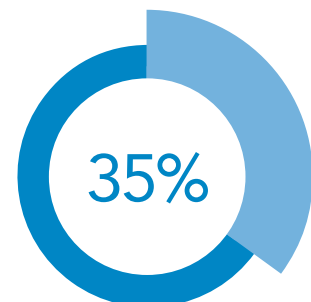


EXECUTIVE SUMMARY

The findings from the 'Changing Face of a Ski Holiday' report commissioned by Club Med have shown that you don't need to be able to ski or snowboard in order to enjoy a holiday on the slopes.



of people already go on a winter sports holiday, but don't actually ski or snowboard at all



say that resorts which offer a variety of activities are more favourable when choosing which destination to visit



— I like a variety of activities, particularly to keep children entertained.

— As non-skiers we like to take part in other activities.

EVOLVING FACE OF SKIING

When booking a ski holiday, families regard the leisure facilities available within the resort or complex as one of the most important aspects of their holiday. The availability of some of the other activities outside of the immediate snow and snowboard facilities is seen as the biggest change over the past few decades. 81% of Brits agree that there is more to do on a ski holiday than just ski and 61% agree that with the extra activities, ski and snowboarding holidays are now a better experience for children than they used to be.

“More and more of our new and returning customers now base their decision on where to go skiing on the array of extra activities available to them in resort. At Club Med, guests can enjoy everything from Snow Shoes to Cross Country Skiing, something that was only introduced recently due to popular customer demand.”

— Estelle Giraudeau, Managing Director United Kingdom, Ireland and Scandinavia



Half of those considering a ski holiday think of non-ski activities as important. Of those considering a ski holiday, 43% would like adventurous activities to take part in during the day such as riding snowmobiles.

Almost a third of those considering a ski holiday regard having spa

facilities available as important on a ski or snowboarding holiday. 48% of the family audience agree that having childrens clubs and activities within the ski resort are important contributing factors.

Wanting a variety of activities and something different to do are among

the top reasons as to why having non-ski activities are important. Some respondents also referenced that although skiing is fun, they wouldn't like to do it all the time.



MORE THAN JUST SKIING

A growing range of alternative activities have been taken up by those families opting for a different snow holiday.

Of those who didn't ski or snowboard on their last holiday, 15% chose to participate in Cross-Country Skiing, with a further 15% choosing Dog Sledding. A tenth (11%) of Brits have substituted skiing with Ice-Skating, and 9% with Rock Climbing. Bobsleighbing (6%), Cross-Country Skiing (4%), and Nordic Walking or Snow-Shoeing (4%) were also popular activities for the modern-day ski holiday. For families that don't want to ski all the time, there are still plenty of winter sports activities for them to enjoy together.

For those that ski, the most common complimentary activity is spa usage with over two-thirds (38%) using the spa in addition to skiing – half of these (49%) doing so in the evening. Evening entertainment comes second (36%) and – for particularly active holidaymakers – using the gym third (24%).

Additional winter sport activities



15% Spa



15% Dog Sledding



15% Cross-Country Ski



15% Evening entertainment



15% gym



11% Ice-Skating



9% Rock Climbing



6% Bobsleighbing



4% Cross-Country Skiing



4% Nordic Walking
or Snow-Shoeing

SKIING ETIQUETTE

With more people looking to go on a family snow sports holiday, skiing etiquette, both on and off the slopes, is a key concern for Brits during the 2015/16 ski season.

Bookings for winter family holidays are already up by 9% for this season versus last year at Club Med and include a large proportion of first time skiers.

Less than two-thirds of skiers (61%) are confident they understand the rules on the piste; a figure that drops to just 54% of people who haven't skied in

the last two years but are considering skiing in the near future. Those that have skied in the last two years are much more confident, with over two thirds (74%) considerate of how to behave appropriately on the slopes of their host country.

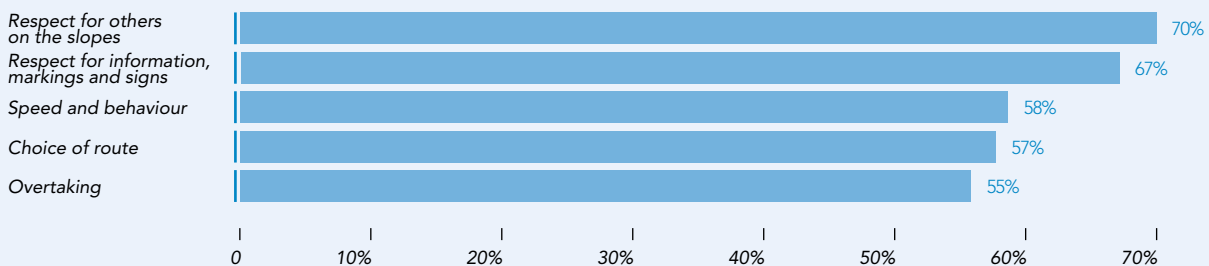
The older generation are more aware of ski etiquette (66%) than the

younger generation (55%). Confident skiers, perhaps unsurprisingly, are aware of skiing etiquette when it comes to interaction on the slopes and in-resort, with 85% possessing a strong knowledge of both ski and snowboard etiquette.

“When people are going on a snow sports holiday it’s important that they understand not only the etiquette, but also the rules and regulations on the mountain as per the FIS 10 Rules for the conduct of skiers and snowboarders. We’re dedicated to sharing safety and etiquette tips to both new and confident skiers alike, and support companies such as Club Med who supply ski lessons alongside their holidays to ensure people are well-equipped when they hit the slopes.”

— Alyn Morgan, Head of Member Services at the Ski Club of Great Britain

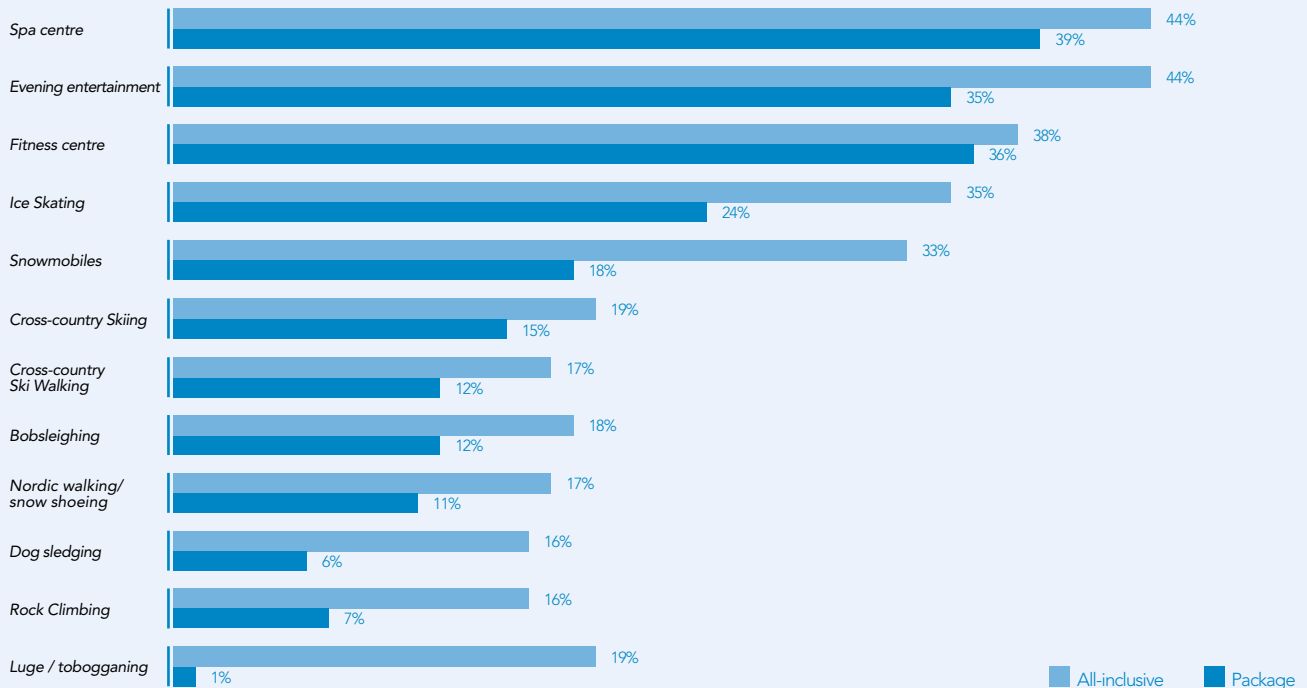
While a general respect for others on the slopes was the most widely-recognised rule for over two-thirds of Brits (70%), those who have been on a snow holiday in the past two years have an awareness of a range of skiing etiquette including:



COST

While cost remains an important factor for people planning winter holidays, three quarters agree that a ski and snowboard holiday provides value for money, with the average cost of a ski holiday coming in at £2,785 for a family. Only 3% of Brits believe that ski holidays are poor value for money.

All-inclusive holidays incorporate a wider range of activities than package holidays, including some of the more thrilling activities.



Half of Brits paying for a package holiday choose to go for a week (42%), while those opting for a DIY ski holiday vary more in length; just a third (29%) choose one week and 34% opted for less than six days. Similarly, all-inclusive ski holidays are most commonly booked for one week (42%) or up to two weeks (29%).

The newly launched Club Med website tool How Much? has been launched to demonstrate the value of an all-inclusive ski holiday, compared to DIY packages. The website app demonstrates the value of a Club Med all-inclusive offering versus what can be compiled by individuals, with prices coming in cheaper 78% of the time.



— Lift passes provide good value on an all-inclusive holiday, averaging just £51 per lift pass versus £90 for DIY holidaymakers, a saving of 43%



With all-inclusive bookings growing in popularity, half (52%) now incorporate some form of added leisure activity within the cost such as Walking Tours, Ice Skating, Massages, Rock Climbing or Snowmobiling.

A much wider range of activities are provided on an all-inclusive holiday versus package: a fifth (19%) having tried Luge or Tobogganing, a third

(33%) Snowmobiling, and 17% Snow Shoeing. This is compared to 1%, 18% and 11% respectively for those on package holidays.

DIY ski holidaymakers (booking accommodation, flights and activities separately) spend more per person on holiday basics but much less on leisure or adventurous activities. All-inclusive holidaymakers average £236

for accommodation while those on a DIY holiday spend £307. Those heading on a package holiday spend least on accommodation at £213 per holiday.

Of the activities people are most willing to spend money on throughout their ski holiday, Snowmobiling comes first – above skiing – with 57% planning to pay for this on their next ski holiday.

“Brits are willing to pay an average of £50 per activity: many providers now include these activities as part of their all-inclusive package, with Club Med offering a range of activities at no extra cost.”

Estelle Giraudeau,
Managing Director
United Kingdom, Ireland and
Scandinavia



WHERE WE'RE SKIING NOW – AND WHAT'S HOT FOR THE FUTURE

Europe is still the number one destination for Brits, with Switzerland and France specifically among the top destinations for visiting. Just 2% of Brits have visited Scotland skiing. There is however, an ever increasing appetite for Brits who are looking to travel further afield to enjoy the slopes. Almost one in ten (8%) said that they have been to America and Canada. Some also revealed that they had recently been skiing in Asia.



Asia is however seen as an up and coming region with one in seven people admitting that they would consider it as a ski holiday destination.

When looking at growth of popularity amongst those planning a ski holiday within the next year, both Asia and America are showing growth as a potential popular destination for ski and snowboarding holidays. 68% of people though admitted to not knowing enough about skiing in China and 61% didn't know enough about skiing in Japan.

The Club Med resort of Yabuli (China) and Hokkaido (Japan) offer an authentic all-inclusive family holiday experience. In recent years, bookings of Club Med resorts in Asia have more than doubled amongst British customers. According to the research these bookings take longer due to customers' lack of knowledge about the local area.

Club Med revealed that one in five take their holiday in March and April, whilst not surprisingly those with children focus their holidays in December, February and April school holidays with the most popular being Val Thorens for the 14/15 season to date.

According to the Ski Club of Great Britain Consumer Research Report 2015, the most popular place for skiers to fly to is Geneva with a quarter (24.6%) of skiers using this as their destination airport, followed by Grenoble (10.2%) and Innsbruck (9.7%). Outside of the Alps, Eastern Europe is increasingly popular, with 2.6% of skiers now flying to the Bulgarian capital of Sofia for their snow sports holiday.

Club Med research shows of those that skied in March, 51% went to France, 20% went to Austria and 18% went to Switzerland. Only 2% chose to ski in Japan and July was the most popular month, with over one in ten choosing to ski then (13%).

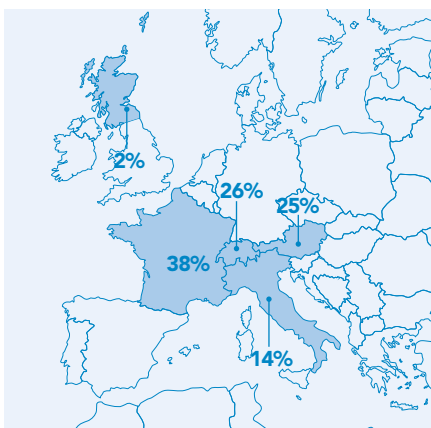
Booking data from Club Med has revealed that the new Val Thorens resort in France is the most popular during school holidays.

Nearly all of those with families at home would consider taking their child on a skiing holiday. They state it would be something different and fun for the whole family, with France specifically being seen as a suitable destination to take children. 23% of the families questioned agreed that America and Canada are suitable destinations to take children.

Where Brits are heading this season

EUROPE 96%

(OTHER EUROPE 10%)

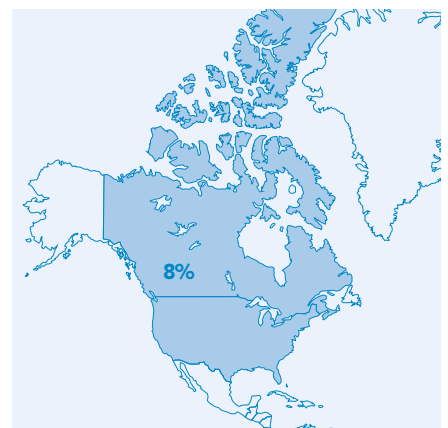


ASIA

(OTHER ASIA 1%)



AMERICA AND CANADA







BEST RESORTS FOR FAMILIES

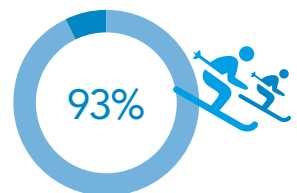
Skiing remains a popular holiday for families, with 93% considering a snow sports holiday in the future.

The most popular reasons cited were that ski is a fun and enjoyable pastime, with almost half stating this was the most important reason for choosing this style of holiday. Almost a third of people admit being together as a family is the main reason to go on a snow sports holiday, with children's enjoyment a key factor in the holiday decision-making process.

A fifth (21%) want to experience new things such as skiing, boarding, or other snow-related activities while a tenth of people choose a snow sports holiday as it is a chance to do something different to a traditional sun holiday.

Due to its short flight times and the generally reliable snowfall offered by the Alps in particular, Europe remains the top destination for Brits going on a snow holiday with the vast majority (95%) choosing it as the best destination for taking children on a winter sports holiday.

Nearly two-thirds of people favour France when it comes to skiing with the family, with Club Med's Val Thorens resort the most popular of their family ski resorts during the 2015/16 season.



would consider going with a child

Most popular resorts for family snow sport holidays

1. France (60%)
2. Switzerland (45%)
3. Austria (45%)
4. Italy (38%)
5. America & Canada (23%)
6. Europe – other (17%)
7. China or Japan (6%)



SKIING VS SNOWBOARDING

Skiing remains the most popular out of the two sports, but a growing level of overlap reveals people are increasingly keen to experiment when on the slopes.

Nearly half (48%) of people dedicate their holiday to skiing: a tenth solely board (11%) and over a fifth (21%) now choose to both ski and snowboard during their winter holiday.

While skiing is perceived as faster by nearly two-thirds (60%) of Brits, snowboarding is still perceived as the 'cooler' sport, with 63% thinking of snowboarding as cool compared to just 22% who think the same of skiing.

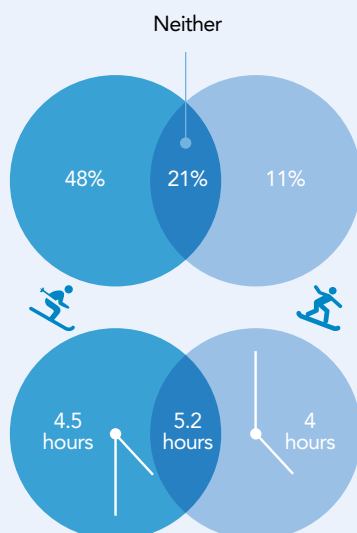
Snowboarding is also seen as the more trick-focused of the two, with three quarters (74%) believing this to be true of boarding versus only 20% for skiing.

Perhaps unsurprisingly, snowboarding is still seen as the preferred sport for young people, with 74% of people identifying it as such, compared to less than a fifth (16%) who perceive skiing a sport reserved for the younger generation.



Skiing remains the more popular of the two but there is a high level of overlap, showing the need for variety on the slopes

Activity done and for how long



SUMMARY

The way in which holiday makers are taking their annual winter sports holiday is changing.

Winter sports enthusiasts are increasingly looking for more than just a skiing holiday. At Club Med we've looked to ensure our all-inclusive offering adapts to the needs of our clients, ensuring we have something for guests that want to ski and guests that want to enjoy winter sports activities.

Skiing does however continue to remain a popular holiday for families, with 93% considering a snow sports holiday as an option in the not so distant future.

When looking at the booking habits for a ski holiday, families regard the leisure facilities available such as the gym facilities and evening entertainment options within the resort or complex as important aspects of their winter sports break.

Results from within the report also revealed that Brits have substituted skiing with activities such as Ice Skating, Rock Climbing, Bobsleighbing, Cross-Country Skiing, Nordic Walking and Snow-Shoeing.

More activities than ever are now on offer in ski domains around the world. Areas such as Asia are increasingly being considered as a potential destination in 2016 and beyond. Resorts are adapting to the changing needs of the winter sports holiday maker, making it a more accessible destination for ski in the forthcoming seasons.

Club Med offers affordable all-inclusive holidays around the world. From luxury chalets to resorts specifically designed for families with young children, the Club Med experience ensures that all aspects of your winters sports holiday are covered, from gourmet cuisine to flights and transfers.





All figures, unless otherwise stated, are from Jigsaw.



The research was conducted by Jigsaw Research:
jigsaw-research.co.uk

Jigsaw Research is an independently owned quantitative and qualitative market research agency with an exclusively senior team. They provide perceptive counsel and genuine, sector-specific insights. Staff at Jigsaw have an average of 15 years' experience and are involved in every stage of the research process.

The fieldwork was undertaken between 23rd September and 28th September, 2015. The research incorporates 1,018 adults, 322 of whom had been skiing in the past 2 years. The survey was carried out online and lasted between 10 and 15 minutes. Questions were multiple choice, with multiple responses permitted.



The Ski Club Great Britain is a not-for-profit members' Club offering benefits and services to people who love skiing and snowboarding.

Founded in 1903, the Ski Club is a body of authority for recreational skiing in the UK. With almost 29,000 members, it is the UK's biggest snow sports members club, with the UK's most visited snow sports website: skiclub.co.uk

Club Med the luxury tailor made holiday provider, is known as the pioneer in all-inclusive holidays since opening in 1950 and now operates in 60 destinations globally including 23 ski resorts. The destinations in which Club Med offer ski resorts includes the French, Swiss and Italian Alps as well as Japan and China.

Club Med offers the most comprehensive ski package on the market, with many extras provided as standard. Believing in hassle free holidays, Club Med prides its self on ensuring ski holidays are stress free and 100% happy.

Club Med have been awarded "Brand of the Year" at the 2015 World Branding Awards, the Silver award in Prima Baby's "Best Family Holiday Brand for 2015", 26 of their resorts have been awarded the '2015 TripAdvisor Travelers' Choice Award' and 42 Club Med resorts have received '2015 TripAdvisor's Certificate of Excellence'.

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The Club Med logo, featuring the brand name 'Club Med' in a white serif font followed by a stylized white Psi symbol (Ψ) on a dark blue background.

Club Med Ψ