

Club Med

Asia Snow Report 2023:

Mountain Holiday Trends & Insights



A report commissioned by Club Med



We are delighted to present the Club Med Asia Snow Report 2023. This report explores the Asian travellers' behaviour towards snow holidays, highlighting noteworthy trends and developments. Also offered is a unique perspective of these insights through the lens of the premium all-inclusive concept which Club Med pioneered.

Globally, Club Med welcomed over 766,000 clients in the first half of 2023, a remarkable 28% year-on-year increase and 2% higher than pre-pandemic levels. Winter Mountain Resorts accounted for 40% of Club Med's business volume during this period. In Asia Pacific, snow holiday bookings increased significantly for the upcoming season, with an 88% rise in business volume compared to the previous year.

Between 2021 and 2022, Club Med expanded its portfolio with the opening of five resorts across Europe, North America and Asia:

- **Club Med Tignes**
- Present since 1958, a flagship Resort located in an iconic ski destination
- **Club Med Québec Charlevoix**
- The first Club Med Mountain Resort in Canada
- **Club Med Changbaishan**
- The third Club Med Mountain Resort in China and the brand's first forest hot spring Resort
- **Club Med Kiroro Peak**
- The third Club Med Mountain Resort in Hokkaido, Japan
- **Club Med Val d'Isere**
- The latest and first Club Med Exclusive Collection Resort in the Alps

Additionally, four new resorts are set to open between 2023 and 2025:

- **Club Med Kiroro Grand, Hokkaido, Japan**
- **Club Med Forlong, China**
- **Club Med Urban Oasis Taicang, China**
- **Club Med San Sicario, Italy**

We trust the insights contained in the following pages of this report will offer a fresh perspective of consumer confidence and trends in one of the most exciting regions of growth, Asia.



**The purpose of life is to *be happy*;
the time to be happy *is now*.
and the place to be happy *is here*.**

Gérard Blitz
Club Med Founder

In the first half of 2023, Club Med received more than

766,000

guests worldwide, a remarkable 28% year-on-year increase

Winter Mountain Resorts accounted for over

40%

booked worldwide with Club Med in the first half of 2023



*Club Med's Asia Snow Report 2023
reveals the latest trends and insights
shaping the dreams of Asian travellers
for their winter holidays.*

Snow holidays have become increasingly desirable with Asian travellers flocking to pristine snowscapes for winter sports and activities. But what do consumers really want from a snow holiday?

Club Med, the leader in providing exceptional all-inclusive holidays, embarked on an in-depth study to delve into the intricacies of these unique experiences. The study, which surveyed over 3,500 respondents across seven markets in Asia, revealed key insights into consumer preferences and key factors influencing travel decisions.

Here are some key highlights from Club Med's Asia Snow Report 2023:

- Snow holidays are accelerating in popularity across Asia, with the top motivators being easy access to and the thrill of winter sports, the attraction of snow-covered landscapes, and a desire to escape the monotony of daily life
- Japan is the most popular snow holiday destination for Asian travellers, followed by Switzerland, Canada and China
- Travellers tend to start planning for a snow holiday 3.4 months ahead and have an average budget of 522€ per person per day
- All-inclusive snow holidays appeal to travellers for the convenience, value, and peace of mind it offers
- Kids clubs are extremely important, particularly for families traveling from China, Malaysia and Singapore.

Methodology

Club Med commissioned Dynata to understand the Consumer Behavior related to Snow Holidays travel in Asia. Quantitative Research was conducted between 1-30th September 2023 and included 3548 respondents from seven markets in Asia: South Korea (484), Singapore (492), Malaysia (493), Japan (378), China (501), Hong Kong, China (511) and Taiwan, China (503).

Participants were selected across all Dynata's research panel assets, and the sample quota-controlled to cover different life stages including single, couples and families with kids. Respondents, aged between 25 and 64, who participated in the survey either had gone on snow holidays in the last 5 years or intend to go on snow holidays in the next 2 years.

The margin of error (at the 95% confidence level) is +/-1.5% at Asia level.

Data collected was weighted to ensure adequate representation of Asian travellers.

Snow Holiday Preferences: *What Travellers Want*

More than half of respondents cite the appeal of winter sports and activities as key motivators for snow holidays. In addition, the serene beauty of snow-covered landscapes further enhances the attraction of a winter escape.

Beyond these, travellers are also seeking to escape the monotony of daily life and explore new destination, cultures and cuisines. Excursions to local sights, tasting local delicacies, sports equipment rentals, other snow activities and video and photoshoot services are among the top considerations for snow holidaymakers.



Sightseeing



Spa



Local delicacies



Sports equipment rentals



Other snow activities



Video & photoshoot services

Asia: 8 days

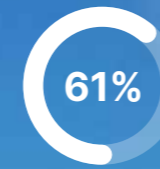


Europe & Americas: 12 days

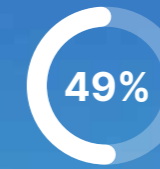


For snow holidays in Asia, travellers are expecting to stay for an average of 8 days while 12 days was the anticipated length of stay for long-haul snow holidays in Europe or the Americas.

What does a snow holiday mean to Asian travellers?



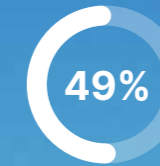
It means **doing snow related activities** like ski / snowboarding / ice skating



It is a time to **enjoy winter festivals** and connect with loved ones



It includes **beautiful sightseeing** such as views of snowcapped mountains, frozen lakes



It means **creating warm memories** with loved ones in snow



It includes **cultural experiences** such as visiting local attractions, trying traditional cuisine, and learning about local traditions

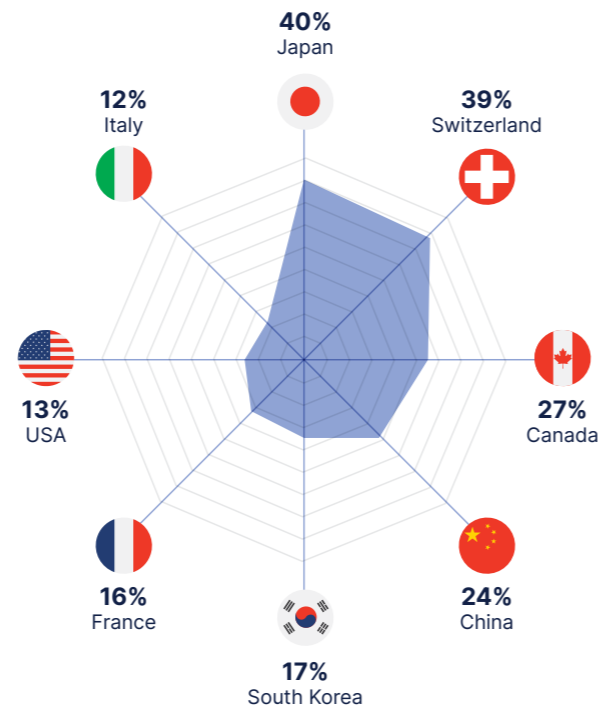


It is a way to **escape from the heat**

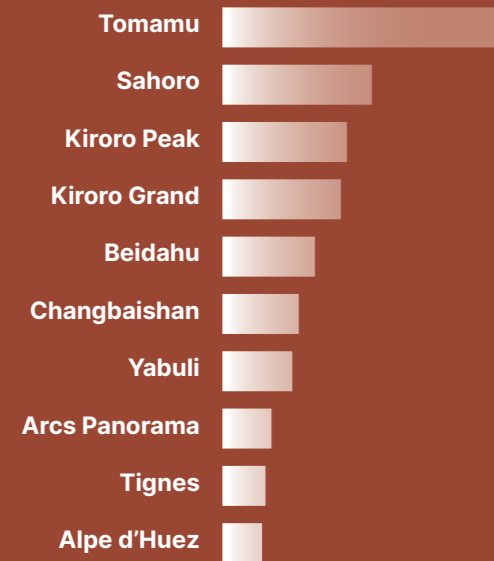
Destination is Key to a Memorable Snow Holiday

The foremost consideration when planning a snow holiday is choosing a destination that boasts a wide variety of winter activities. Subsequently, finding appropriate lodging and weather considerations are significant factors when travellers plan their winter holidays.

Japan tops the chart as the most popular snow holiday destination, with 40% of respondents choosing it as one of their top two choices. Switzerland comes in a close second at 39%, followed by Canada at 27%. China follows in fourth place at 24% mainly driven by the domestic market. Switzerland's popularity is driven by travellers from South Korea, Malaysia and China while Japanese travellers are the main drivers for snow holidays in Canada.



Top 10 Club Med Snow Resorts



All four Club Med Japan resorts lead in the Top 10 Snow Resorts booked by Asian travellers for 2023, followed by those in the French Alps.

Within South and East Asia, Club Med Asian Mountain Resorts and French Mountain Resorts **outperformed 2019 by 41% and 37% respectively**, indicating a growing awareness and intention for snow holidays in these two key destinations.

The Thrill of Winter Sports

54% of the respondents said that the primary appeal of winter sports lies in the thrill and pleasure they offer. This is especially true for people in the 25-44 age group, who also perceive winter sports as social currency to enhance their personal image of being successful. However, respondents in the 45-54 age group appear to be primarily motivated by the idea of experiencing something different instead.

Three in four respondents indicated that they had some experience with skiing and/or snowboarding, with skiing being the more popular winter sport. In fact, Japan (95%) and South Korea (90%) showed high levels of skiing or snowboarding experience, this could be attributed to the proximity of snow slopes located within both markets and hence the likely familiarity with winter sports.

For families with children, 6 to 8 years old is considered the ideal age to start learning winter sports. Additionally, one in two families is willing to invest in indoor ski lessons for their children prior to their visit to a real ski domain, with China showing the highest interest (65% of families), followed by Singapore (55% of families), Hong Kong, China (54% of families) and Malaysia (53% of families).



How Travellers Plan and Book their Accommodation

Asian travellers tend to start planning for a snow holiday 3.4 months ahead with the exception of China and South Korea indicating a shorter window of less than a month. Singapore and Malaysia tend to plan 4 to 6 months ahead, much more in advance than the others.

Travel inspiration is significantly acquired through digital channels and social media (48%), online travel agencies (44%) and online blogs and communities (26%). Recommendations from family and friends also exude strong influence (38%) while other notable channels of travel inspiration include offline travel agencies (31%), TV travel shows and channels (29%) and travel/lifestyle publications (24%). When looking at travel inspiration by demographic, younger travellers display more usage of social media and online travel agencies compared to more mature respondents.

How far in advance do APAC travellers plan their snow holiday?

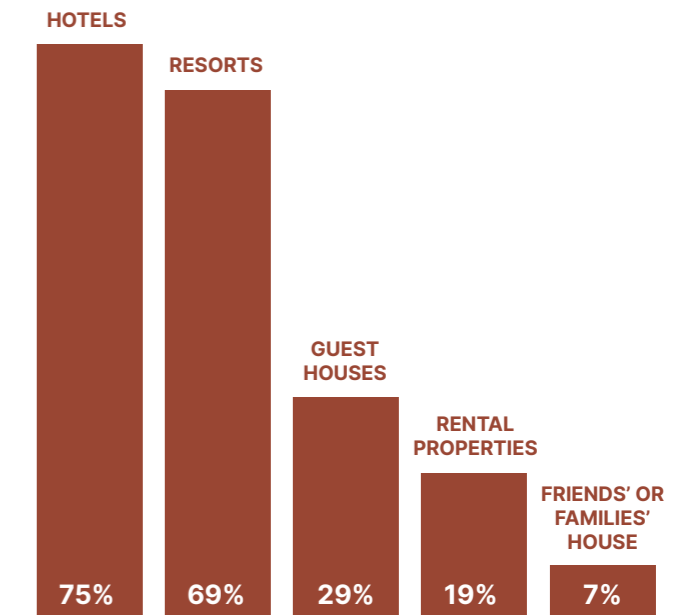


Nearly half of travellers book their holidays either on branded websites or offline travel agencies. This underscores the importance of maintaining a robust online presence and ensuring a seamless, personalized booking experience, catering to the varied travel booking behaviours across the diverse markets in Asia.

In terms of preferred accommodation, hotels and resorts are clearly the top choices for snow holidays, within which families with kids gravitate more towards resort accommodation. Others preferred guest houses, rental properties or friends' and families' houses. Some key factors when choosing their accommodation for a snow holiday:

- Availability of outdoor activities:** Respondents want to be able to easily access a variety of winter activities, such as skiing, snowboarding, and snowshoeing.
- Location:** Accommodation should be located near the snow slopes and other amenities, such as restaurants, shops and bars.
- Service quality:** Reliable and high-quality service, including attentive staff and well-maintained facilities, is essential for an enjoyable snow holiday.
- Health and safety measures:** Accommodation should have comprehensive health and safety measures in place to mitigate the risks associated with snow sports.
- Pricing:** While price is not the primary concern, competitive pricing is important for value-conscious travelers.
- Cuisine options:** Guests want to have a variety of high-quality food options available during their stay.
- Accessibility:** Accommodation should be easily accessible, especially during challenging winter conditions.
- Room size, quality and design:** The room should be tastefully designed and furnished, creating a space that is both inviting and relaxing.

Preferred accommodation options



Average Planned Budget per person per day across seven markets in Asia

South Korea	396,000 KRW 277 EUR
Singapore	799 SGD 538 EUR
Malaysia	2,801 MYR 560 EUR
Japan	39,690 YEN 250 EUR
China	3,034 YUAN 392 EUR
Hong Kong, China	4,628 HKD 560 EUR
Taiwan, China	17,064 TWD 500 EUR

The average budget for a snow holiday is 522€ per person per day, with Japan and Korea indicating slightly lower average spends of 250€ and 277€ respectively. This budget covers accommodations, meals, snow-related activities, and equipment rental.

All-Inclusive Packages Appeal to Travellers for *Convenience, Value, and Peace of Mind*

Two in three respondents are aware of the term 'All-Inclusive', with significantly higher awareness seen among those with kids, such as in Singapore and Malaysia.

Travellers value the availability of varied dining experiences including access to specialty restaurants and bars, onsite ski and snowboard equipment rental and classes, excursions to explore local sights and culture, and après ski entertainment. The option to include return airfares and airport pick-up services also help to make these packages even more convenient and appealing.

For families with kids, the availability of kids care facilities is understandably an important element for snow holidays.

All Club Med packages include:

-  Premium Accommodation
-  Ski Lift Pass
-  Ski and Snowboard Group Lessons
-  Full-day Gourmet Cuisine and Open Bar
-  Kids and Teens Club from 4 to 17 Years
-  Après Ski Activities and Entertainment



Stress-Free Snow Holidays for Families: *Easy Planning and Peace of Mind*

All-inclusive snow holidays can be a great option for families as they easily provide everything needed for a memorable experience in one package.

86% of family respondents agree that an all-inclusive snow holiday is more convenient than buying and organizing different holiday elements separately, and that it provides the opportunity to enjoy different types of activities for one price. Additionally, 82% of family respondents agreed that all-inclusive snow holidays offer better value for money than à la carte holidays, and 83% agreed that they reduce the risk of ill-planning.

Multigenerational snow holidays are an emerging trend particularly for Singapore, Malaysia and Taiwan markets, illustrating the importance of having amenities and activities in one resort that appeals across all age groups and life stages.

Families are at the heart of Club Med

Club Med is a pioneer of family experiences since 1967. Families will feel right at home with a myriad of family-friendly activities and amenities, including dedicated Kids Club for children aged four months* to seventeen years old, under the caring guidance of dedicated G.Os and instructors.

The award-winning Amazing Family! programme further creates opportunities for families to bond through fun-filled activities. Families can have a ton of fun too in the powdery snow with snowshoe experiences, an outdoor playground area and snow garden for the little ones.



4 to 23 months*



2 to 3 years old*



4 to 10 years old



11 to 17 years old

*Baby Club Med and Petit Club Med are available at additional costs and in selected resorts only.



Club Med: **Meeting the Growing Demand for** ***Snow Holidaymakers***

Strategically, Club Med continues to develop its Mountain Resort portfolio with new openings in Asia, America and the European Alps, in addition to refreshing and creating new spaces and experiences in existing Resorts to offer guests the best possible, premium snow holiday experience.

Trends and insights from the Club Med Asia Snow Report 2023 indicate that Asian travellers are looking for more than just access to skiing and snowboarding. They are seeking complete holiday experiences - from comfortable accommodation, easy access to snow slopes and winter sports expert instruction complemented with availability of ski equipment rental; to delicious cuisine, family-friendly facilities and activities, festive après-ski entertainment and more, a one-stop, holistic holiday destination is increasingly expected when Asian travellers approach snow holidays.

This is especially relevant to families. At Club Med, families can look forward to experiencing the unique Mini Club+ programme provided for children 4 to 10 years of age, developed in partnership with education experts in positive education pedagogy whilst a specially designed programme for 11 to 17 years of age keeps teens meaningfully engaged. Families can also participate in the Amazing Family! programme which provides opportunities for children, parents, and extended family to connect through curated fun activities. As a result of a unique family-friendly approach, Club Med enjoys a large clientele of families, representing 70% of resort stays.

Considering the insights and findings from this report, Club Med is confident that its portfolio of Mountain Resorts in some of the world's most popular winter destinations positions it well to meet the expectations of snow holidaymakers.

Being the leader in mountain holidays for nearly 70 years, Club Med specialises in providing all-inclusive holidays encompassing a variety of winter activities for families and active adults. This unique offering enables Club Med to be relevant and attractive, now more than ever, for today's Asian travellers.

Club Med

Founded in 1950 by Gérard Blitz, and later joined by Gilbert Trigano, Club Med invented the all-inclusive vacation club concept and childcare concept, with the creation of the Mini Club in 1967.

With operations in 40 countries around the world and nearly 70 Premium and Exclusive Collection Resorts, Club Med offers a piece of mind holiday experience in exceptional destinations and locations including North and South America, Asia, Africa and Europe. With the support of shareholder Fosun Tourism Group and the successful implementation of its repositioning strategy, Club Med is now the world leader in all-inclusive and experiential premium holiday for families and active couples. Club Med employs nearly 25,000 Gracious Organizers (G.O) and Gracious Employees (G.E), representing 110 nationalities.

For more information, visit <http://www.clubmed.asia> or follow Club Med on Facebook, Twitter, Instagram and YouTube.

