



SKIING TOGETHER GENERATION SKI

— WINTER 2014/15

A report commissioned on behalf of Club Med

Club Med 



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INTRODUCTION

This is the second ski report commissioned by Club Med.

It looks to provide exclusive insights into the family ski market and address the rising popularity of the extended family ski holiday amongst British families.

Commissioned by Club Med UK, this second ski report has been designed to examine the motivations behind families booking a ski holiday, and also looks into why people choose to go away in larger groups, where these families are going and what attracts Brits to head to certain ski destinations.

The report comes at a time where Club Med has announced a brand new ski resort in the Alps, Val Thorens, awarded 'World Best Ski Resort 2013'.

The luxury resort will become the flagship snow destination for Club Med's mountain resorts.

Located at the heart of the highest resort in Europe, Club Med 4th Val Thorens will offer ski in-and-out access to one of the most prestigious ski domains of the French Alps: The 3 Valleys.

The extended family ski market is defined as a family that extends beyond the nuclear family group to include grandparents and other relatives.

Within this report, Club Med UK has identified a new emerging trend in the ski market, with record numbers choosing to ski in a group.



Estelle Giraudeau
Marketing Manager
Club Med UK

Club Med 

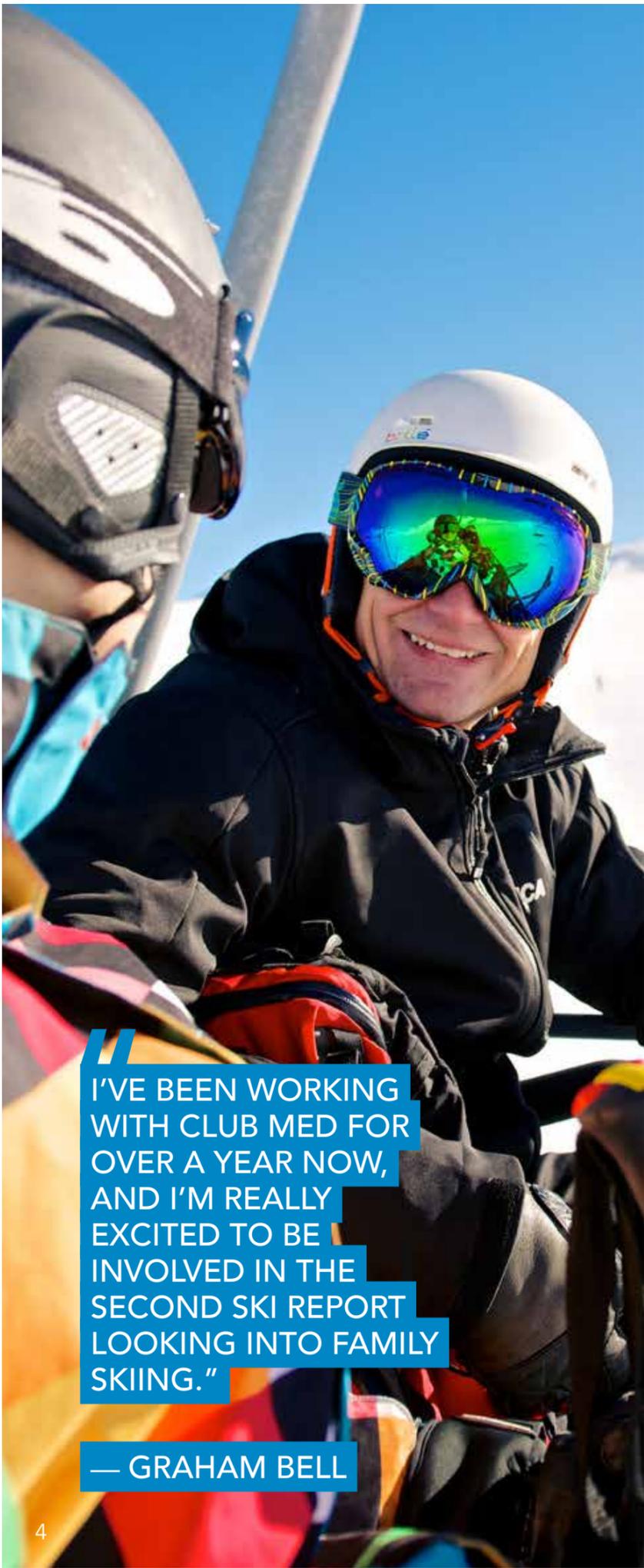
Club Med is the premium ski holiday provider for families, couples and groups of friends in Britain.

Following the success of last season's ski report, it's been really exciting to carry out some further comprehensive research to look into how the family market is feeling in the 2014/15 winter ski season.

Over the past year, we've noticed an increasing trend for families to travel in larger groups when skiing. There are many memories created by a family ski trip and people want to experience these as a collective group.

Skiing hasn't always been the number one choice for families, but at Club Med we understand what families and groups want to enjoy on their ski holiday.

Our 4th Val Thorens resort is a real crowd-pleaser encompassing a great array of activities which can be enjoyed by the whole family including; grandparents, parents, teens and groups of friends."



"I'VE BEEN WORKING WITH CLUB MED FOR OVER A YEAR NOW, AND I'M REALLY EXCITED TO BE INVOLVED IN THE SECOND SKI REPORT LOOKING INTO FAMILY SKIING."

— GRAHAM BELL

EXECUTIVE SUMMARY

The findings from the report commissioned by Club Med have shown that having a holiday with a larger group of people such as that of an extended family makes for a more enjoyable break.

"I started skiing when I was just five years old and introduced my kids to the slopes from a very young age, so family skiing is something that really resonates with me and my family.

It's great when we all get together as a group to go skiing, especially when my brother and father comes along.

It's a great sport for everyone, even for people that don't want to spend the whole day on the slopes; there are all sorts of winter activities to enjoy."

— Graham Bell

Results show that more people than ever would consider going on a winter ski holiday with the whole family; children, parents and the grandparents. An interesting fact that this report looks to highlight is the trend of Gramping – holidaying with grandparents.

With more people looking to take a ski holiday with the extended family, it looks like it has fallen to the grandparents to actually book the holiday. This report looks to explore this trend further.



SKIERS FAVOUR FEBRUARY

Those booking a ski holiday book on average 4.6 months ahead of their trip. Customers of Club Med ski book the greatest number of ski holidays in February as soon as the season opens for the following year. February departures account for almost 30% of winter bookings.

"We've seen an increase of ski bookings for February half term increase fourfold compared to 2013. With all European half terms falling at the same time, and traditionally February half term being one of the busiest for families to go skiing, we've seen an unprecedented demand for our ski holidays with almost all of our winter ski resorts at capacity."

— Estelle Giraudeau, Marketing Manager, Club Med UK

When comparing booking habits from consumers for both snow and sun holidays, there is no variance on the period of time they leave for booking.

Ski holidays are more popular amongst groups of friends and family than sun holidays. The average ski holiday has an average of seven people per booking, compared to just three people in a sun holiday.

This indicates that ski holidays are more of a social occasion for people to get together and catch up in an exciting, foreign destination.

The trend for larger groups¹ travelling together has been recognised at Club Med's Val Thorens resort which is perfectly suited to groups of friends or family looking to spend quality time together.

³ A group counts as eight or more people

In 2015, February half term will be especially busy with all of Europe's schools on holiday at the same time, creating record demand earlier in the year than usual with the majority of bookings confirmed in September, October and November 2014.

When are people booking ski holidays?



■ people booking ski holidays
■ people going on ski holidays



THE SLOPES vs SUN

COSTS COMPARED

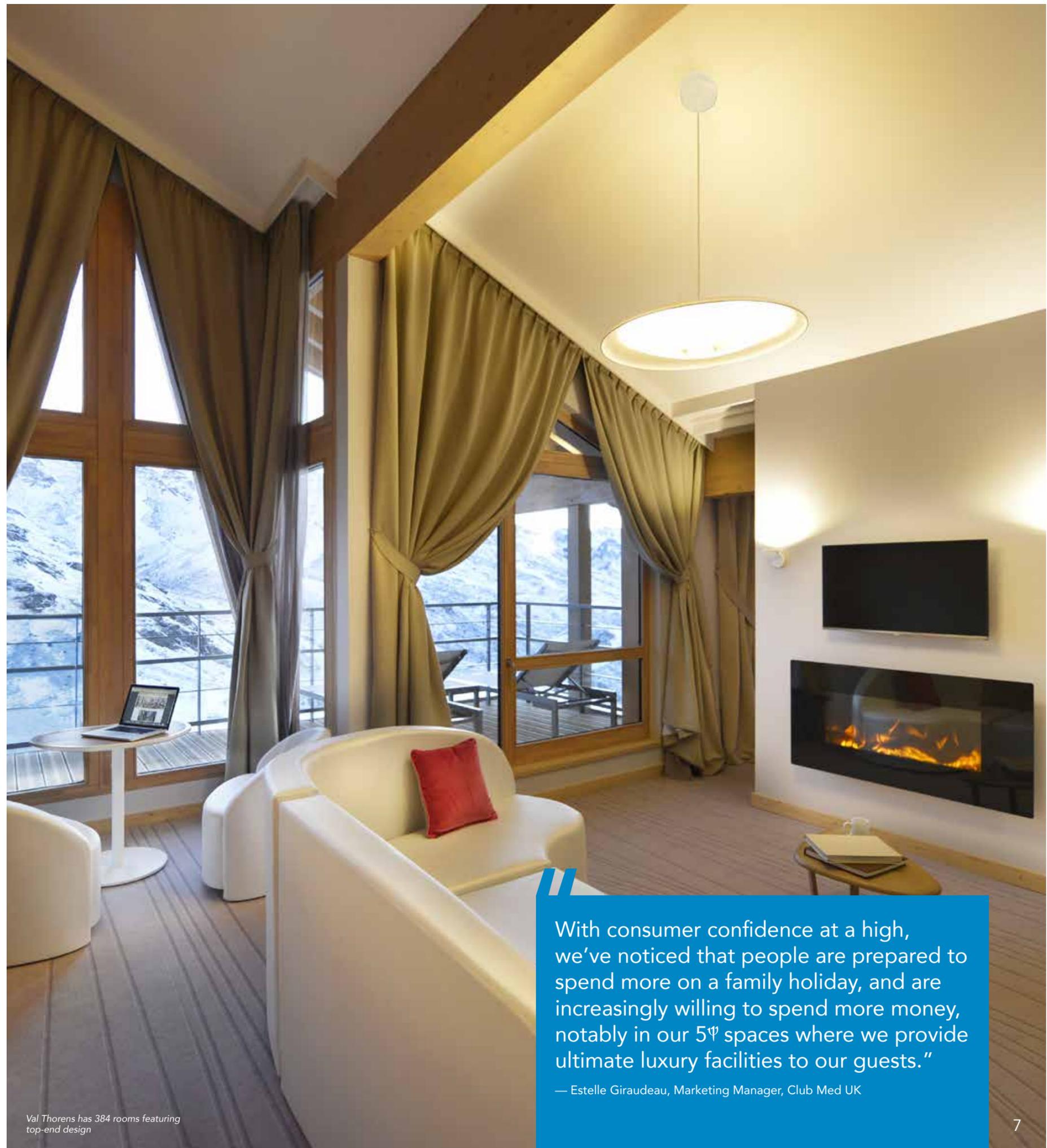
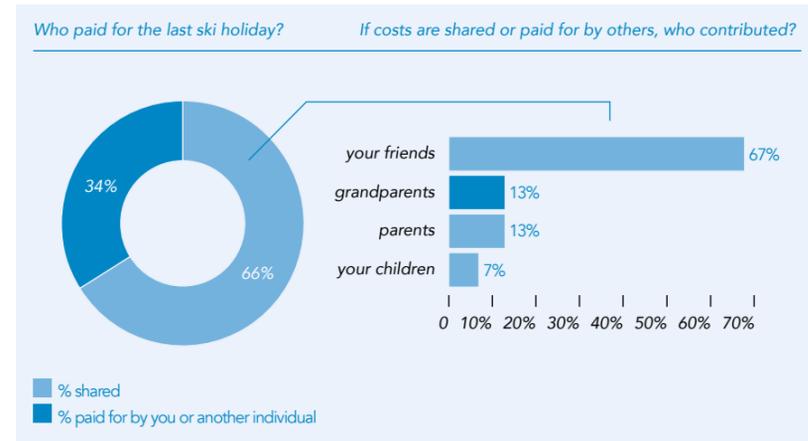
Ski is often considered to be a more expensive holiday option for families. However, research has proved that ski holidays were less expensive than sun holidays in 2014.

The average spend on ski holidays in the UK was £2,262 in 2014, compared to the average sun holiday at £2,292.

Club Med has revealed that confidence amongst customers has increased when it comes to spend. Holidaymakers are spending 4% more on their ski holiday than they were last year.²

With an increased number of extended families travelling together there is also an emerging trend for families to split the bill for their holiday, with sometimes the onus more on the grandparents to fork out (13%) for the cost of the extended family holiday, proving that the bank of mum and dad never closes.

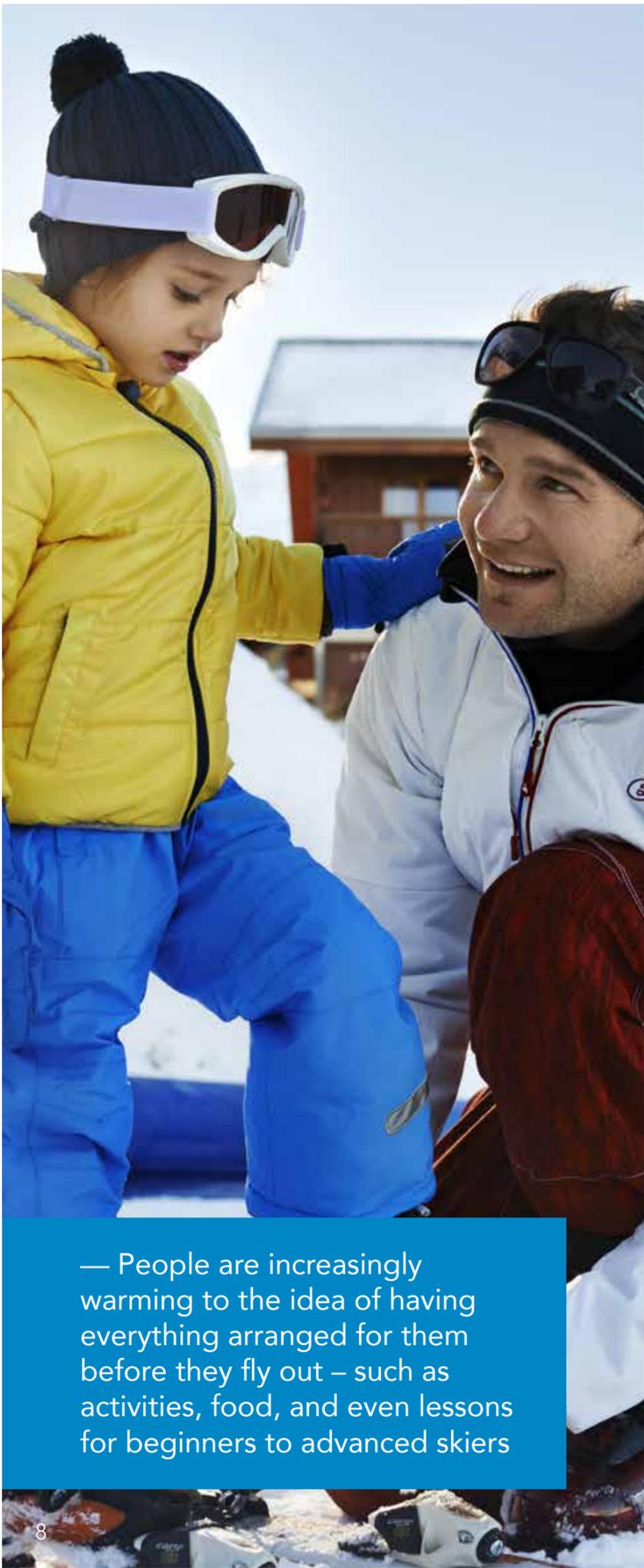
² Based on customers worldwide



“With consumer confidence at a high, we’ve noticed that people are prepared to spend more on a family holiday, and are increasingly willing to spend more money, notably in our 5th spaces where we provide ultimate luxury facilities to our guests.”

— Estelle Giraudeau, Marketing Manager, Club Med UK

Val Thorens has 384 rooms featuring top-end design



— People are increasingly warming to the idea of having everything arranged for them before they fly out – such as activities, food, and even lessons for beginners to advanced skiers

PACKAGES PROVE POPULAR FOR 2014/15

Two fifths of skiers choose to go on a package or all-inclusive holiday, showing an increase of 3% during the 2013/14 ski season³.

Those who choose to go on a package or all-inclusive holiday tend to stay for either 8 or 9 days – versus the 12 days chosen by those on a 'DIY' holiday.

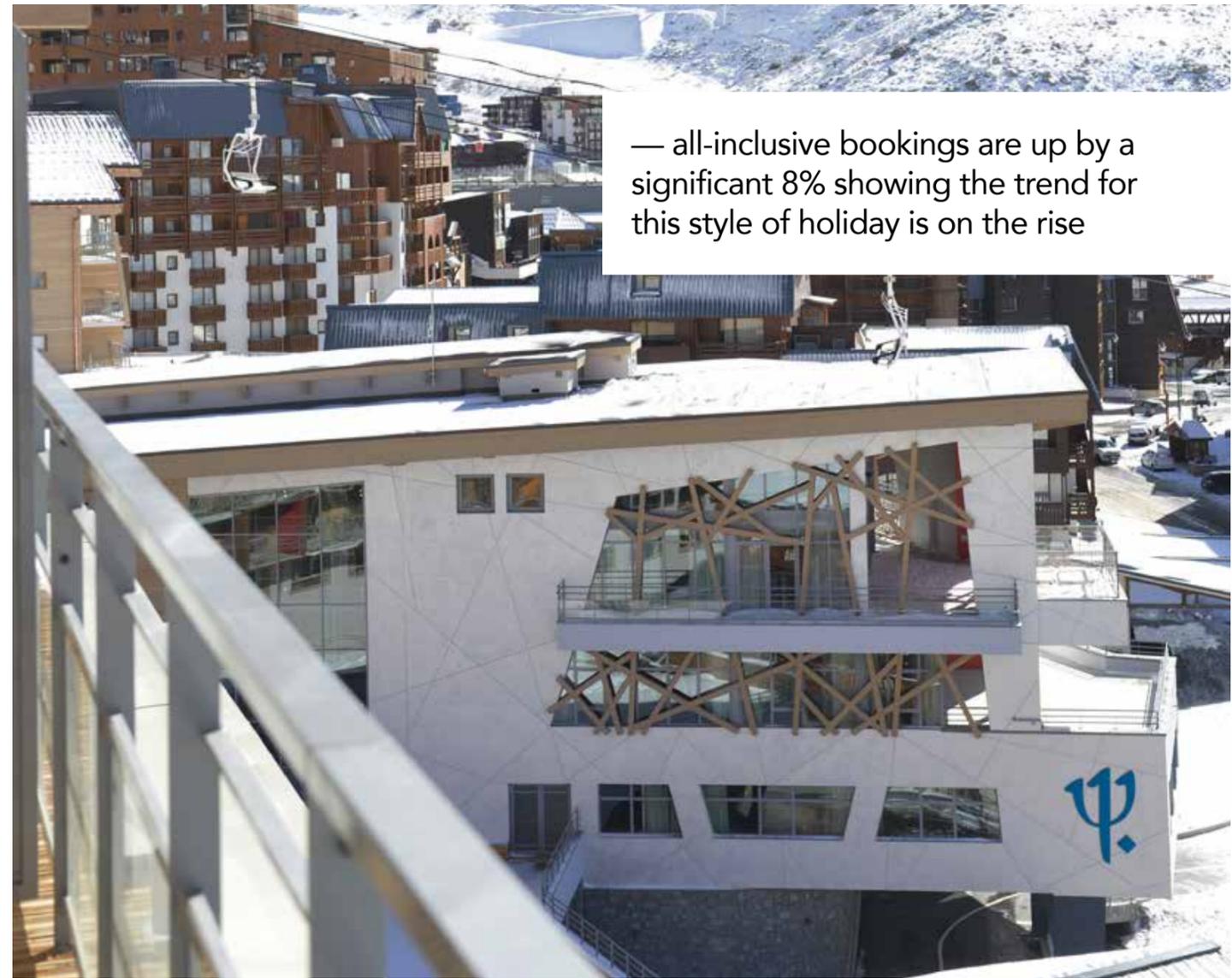
Customers of Club Med cite quality, availability and value as three of the core reasons for selecting their chosen provider.

A hotel is the most likely choice for all-inclusive holidaymakers, with over half of package bookers choosing to stay in accommodation where everything is included.

Sophie Wylam, Head of Club Med Booking Centre, comments:

“Whilst sun packages have always been popular with customers, we’ve seen a recent rise in all-inclusive ski package enquiries. We’ve noticed that in larger groups of families, not everyone wants to ski the whole time so people are looking for more activities for people of all ages.”

³ Based on Club Med booking data



— all-inclusive bookings are up by a significant 8% showing the trend for this style of holiday is on the rise

SKIERS ARE PLANNING FURTHER AHEAD

Club Med data reveals that people are increasingly booking ski holidays further in advance – approximately one month earlier compared to data from 2013, due to improved economic stability, resulting in families and couples being able to plan holidays further ahead.

Industry-wide, all-inclusive ski packages are growing in popularity. Despite ski bookings showing a slight decline when comparing September 2013 to September 2014 – a 4% decrease overall – all-inclusive bookings are up by a significant 8%, showing the trend for this style of holiday is on the rise.

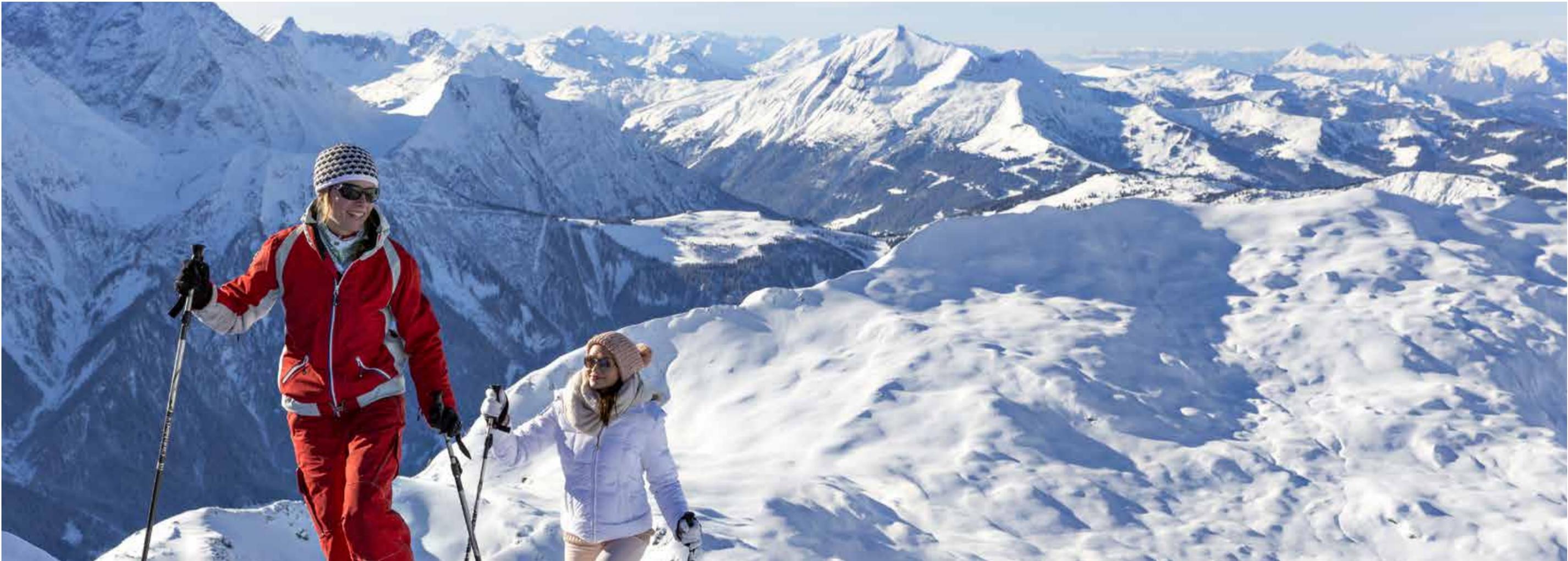
Travel agents are very confident about Brits' holiday habits, with the majority, 93%, feeling positive about the health of the UK travel industry overall.

Ski fares particularly well with 44% of those questioned feeling optimistic about the upcoming snow season.

Travel agents are also confident about all-inclusive ski bookings in particular: almost two thirds expect all-inclusive bookings to be extremely popular in the following months, compared to just 8% confidence of 'room only' bookings and only 17% in relation to 'Bed & Breakfast.'

Daniel Cukier, Travel Agent from Holiday Discounts, comments:

“We’ve seen a real uplift in confidence over the last few years, as it feels families, couples and groups alike are starting to really recover financially and plan ahead for their holidays. All-inclusive is particularly picking up momentum as people realise the benefits of booking everything together in one go.”



ALPS TOWER ABOVE THE COMPETITION

For Brits, the Alps are the most desirable destination for ski holidays attracting 82% of bookings from travel agents for the 2014/15 winter ski season.

The Alps are a popular choice for large groups of families to ski together due to the nature of the choice and terrain.

Families head to the Alps due to the familiarity of the resorts and the accessibility from across the UK.

Travel agents also cited glamour and beauty of the scenery as major selling attractions for customers.

Good value for money, being able to relax and quality restaurants were

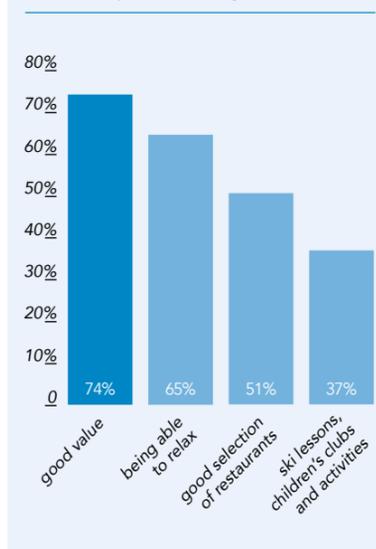
cited as the top three most important decision making factors for families when choosing where to ski.

Ski lessons for all the family, and children's clubs and activities, came fourth on the list of priorities to those who have been on a ski holiday in the last two years. With more people to please including grandparents and children, there are a lot of contributing factors that ski providers need to be aware of to keep everyone entertained.

Angus Kinloch, at Skiline travel agency said:

“For Brits and Europeans the Alps tops the wish list of ski destinations. Customers are attracted to the quality of the ski terrain, choice of resorts and the luxurious accommodation on offer, especially across the region of Les Deux Alps.”

The most important booking criteria for skiers



Perhaps unsurprisingly, Club Med's most popular winter snow resorts are located within the Alps and include Tignes, Peisey-Vallandry and Val D'Isere.

“During the planning stages of Val Thorens, customer input was very important to us. We used crowd sourcing to make sure our client's needs were at the core of the resort. Top quality cuisine was something that appeared time and time again – in response we partnered with Michelin chef Edouard Loubet to curate the menus throughout the resort, something we're very excited about!”

— Estelle Giraudeau, Marketing Manager, Club Med UK

Research reveals that those who choose to travel outside of the Alps for ski do so in the quest for something new and different from what they might be used to in their European snow holiday.

Identifying this trend, Club Med launched resorts across the more exotic terrain of Japan and China for those looking for a little adventure after years of skiing in the Alps.

Despite being in a less conventional ski domain, resorts are still suitable for all the family.

The most popular ski locations for the multi-generational family are:

- Alps (82%)
- Europe (not Alps) (52%)
- USA/Canada (48%)
- Other (11%)

Club Med's most popular ski resorts in the Alps

1. Cervinia, Italy
2. Val'd Isère, France
3. Val Thorens, France
4. Tignes Val Claret, France
5. Peisey Vallandry, France
6. Pragelato Vialattea, Italy
7. Valmorel, France
8. La Plagne 2100, France
9. Aime La Plagne, France
10. L'Alpe d'Huez La Sarenne, France

GENERATION SKI

SILVER SKIERS: GRANDPARENTS TAKE TO THE SLOPES

Whilst over half choose to ski with partners, there's been a notable increase in those holidaying with family members and older generations, with a fifth of holidaymakers having skied with extended family and grandparents in the last two years.

A huge majority would also consider skiing with grandparents in the future, with 83% contemplating it – citing enjoyment and the opportunity to create shared memories as the motivating factors.

Of those who wouldn't consider going on a ski holiday with grandparents, either a lack of interest from the older generation towards skiing, or concerns relating to age, are the top contributing factors.

Increasingly varied offerings at all-inclusive resorts – such as Michelin-starred menus, winter mountain activities, and more and more varied

spa treatments – may see these fears assuaged as the ski holiday is seen as a more multi-faceted, generational trip away.

The continued growth of family bookings in the 2014/15 season has also been attributed to the educational benefits, with almost two thirds of people choosing to ski with their children in order to encourage them to learn new skills.

Family interaction is also high up on people's skiing priorities, with 44% of those asked referencing 'bonding as a family' as a top reason for skiing together.

Graham Bell, ambassador for Club Med, talks about why family skiing is important to him:

"I grew up skiing with both my parents who were hugely supportive of our ski racing career – and I love the thought of going on an extended family holiday and have often skied with both generations. With the older generation staying fitter for longer, there's no reason you can't bring your parents on your next ski trip, as well as the children."

Families cite learning new skills (61%) and bonding as a family (44%) as top reasons for skiing with their children.

Over a fifth of people who had concerns about taking their children put it down to their partner being unable to ski. However, in many resorts, such as Club Med's Valmorel, there are ski lessons for children from as young as four years old – as well as adults, who can learn to ski alongside their kids on a family holiday.

People would also consider skiing with their grandparents as they believe it would be:

- fun, enjoyable, active, different
- an opportunity to create shared memories and share experiences as a family
- an opportunity for them to babysit



"With consumer confidence at a high, we've noticed that people are prepared to spend more on a family holiday, and are increasingly willing to spend more money, notably in our 5th spaces where we provide ultimate luxury facilities to our guests."

— Estelle Giraudeau, Marketing Manager, Club Med UK

IN SUMMARY

The traditional family ski holiday is changing, with more families interested in skiing as a group.

Group bookings are also on the rise, with people increasingly looking to enjoy a ski holiday with a group of friends as well as family.

All-inclusive is proving a really popular option for British travellers when looking to book a ski holiday, with Club Med research revealing that all-inclusive bookings are up 8% compared to last year. People are looking for value for money as well as somewhere with good quality amenities and something for all the family.

The UK travel industry is looking healthy, with the travel agent outlook overwhelmingly positive for the winter 2014/15 season.

This December, Club Med has opened its doors to a brand new Val Thorens 4th ski resort. Club Med Val Thorens will offer a range of innovative snow sports including speed-riding, boarder cross, winter mountain biking, sledging and riding snow scooters. The resort will also boast a luxury wellness centre with Club Med Spa by CARITA offering exclusive treatments and massages.

The new resort is also the first of its kind to use crowd-sourcing in its design stages. Designed as an exciting base for skiers and Club Med's famous GM's, alongside unique architecture and impeccable service, the resort means guests can enjoy a stay that is not only festive and cosy, but also stylish and modern.

Club Med offers affordable holidays for any budget from 3rd resorts to luxury villas and chalets worldwide.

Club Med strives to be the best choice for families, couples and groups of friends when booking their ski holidays in the years to come.



— this report reveals that the traditional family ski holiday is changing, with people increasingly looking to enjoy ski holidays with a group of family or friends

All figures, unless otherwise stated, are from Jigsaw or GfK.



The research was conducted by Jigsaw Research:
www.jigsawresearch.com

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. Jigsaw people have an average of 15 years' experience and are involved in every stage of the research process.

The fieldwork was undertaken between 3rd and 12th November, 2014. The research incorporates 1,002 adults, 277 of whom had been skiing in the past 2 years, and 50 travel agents. Both surveys were carried out online and lasted between 10 and 15 minutes. Questions were multiple choice, with multiple responses permitted.



GfK is one of the world's largest research companies, with around 13,000 experts working to discover new insights into the way people live, think, shop and book holidays in more than 100 countries every day. We offer the most comprehensive and accurate picture of the UK outbound holiday market offering insight into where, when, what and how consumers book.

The Leisure Travel Monitor is the leading service in the UK of its kind, covering the whole of the retail travel agent environment and a defined direct market. The service includes in excess of 15 million passenger bookings per annum and is unique in reporting holiday bookings yet to travel. Data in the report is based on winter 2014/15 for cumulative bookings, from launch up to October 2014.

A family is classified as a booking containing a child. Please note, there is no universal travel definition of children, definitions differ by operator and by holiday type.

Club Med is a responsible resort operator. Ever since 1950, the values and culture of Club Med have been focused on sharing happiness.

Club Med respects others and the natural world and this way of living and working is even more important now than ever before.

Club Med works to protect host regions by supporting local people, their environment and their culture and by making positive contributions to the local community. Club Med is also committed to employing locally, buying locally, transferring skills and supporting entrepreneurship. Twenty six Club Med Resorts are currently Green Globe Certified.

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