

DEVELOPMENT TRENDS OF MOUNTAIN TOURISM AND WINTER SPORTS MARKET, WORLDWIDE, IN EUROPE AND IN ROMANIA

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Abstract

Knowing and studying the trends in winter sports, as well as the demands of the tourists, and also adjusting the offer to those demands as the fast as possible, are essential elements for ensuring the competitiveness in the international mountain tourism market. A number of studies, reports and statistics have led to defining the main trends and basic characteristics of the clientele for winter sports. These conclusions (verified annually by repeating researches) are of great value to those who provide basic services for mountain tourism and winter sports, service providers who must permanently align their services, products and their marketing and promotion policy with the requirements and particularities of demand.

Keywords: *tourism, mountain, winter sports*

Development trends of mountain tourism market globally

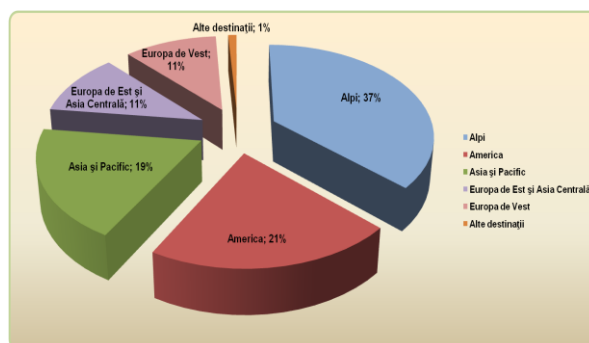
For the second year in a row, the winter season 2017–2018 again registered a global growth trend, after three years of decline. Currently, there are 67 countries that have outdoor ski areas, with a total of 2,084 ski resorts, for which 6 million accommodation places are available.

Of the 2,084 ski resorts, more than half (37%) are located in the Alps (see chart below). At the same time, from the figures analyzed, nearly 80% of the people who come to these resorts declare their main motivation is the practice of skiing.

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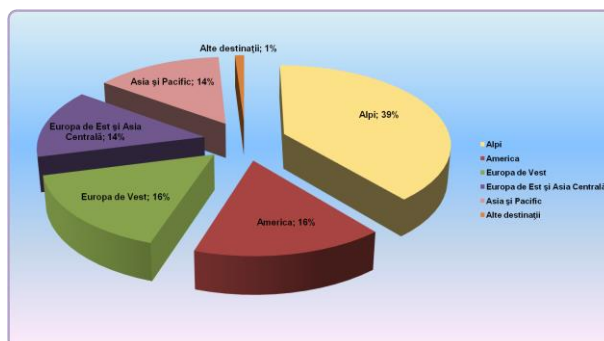
Distribution of the number of ski resorts worldwide in 2018



Source: Laurent Vanat, *International report on snow & mountain tourism*.
Overview of the key industry figures for ski resorts, 2019

As far as the cable transport facilities are concerned, in the 67 countries considered, the same source mentioned above specified that their total number was 26,109 in 2018, most of them (37%) being also located in the Alps (as can be seen in the graph above). We should also mention that France, Austria and the United States of America are the countries having the most cable installations, nearly 3,000 each.

Distribution of the number of cableway installations worldwide in 2018



Source: Laurent Vanat, *International report on snow & mountain tourism*.
Overview of the key industry figures for ski resorts, 2019

Concerning the *preferences* of skiers worldwide, the available information revealed that 44% of them chose the Alps (which remain one of the most important ski destinations), 21% of them America (especially the North American area), 15% Asia and the Pacific nations, 10% Western Europe, 9% Eastern Europe and Central Asia and 1% other destinations.

Regarding the *evolution of the number of skiers*, the figures for the last 15 years have shown some stability worldwide. In 2018, the total number of skiers was estimated at approximately 130,000,000. Of these, the share of foreign visitors was about 12%.

Depending on their *country of origin*, most skiers come from Western Europe and North America (24% each), Asia and the Pacific (22% cumulatively), the Alps (15%), Eastern Europe and Central Asia (13% cumulated) and from other destinations – only 2%

Development trends of the mountain tourism market in Europe

As far as the *profile of the clientele* is concerned, in the mountain resorts in Europe, winter sports are practiced by as many as approximately 60% of the tourists under 35 years old, coming mainly from urban areas or from the proximity of ski areas, having medium and high incomes (which means designing tourist products / facilities / endowments that meet their preferences), and their budget is significantly higher than that of tourists who choose summer resorts.

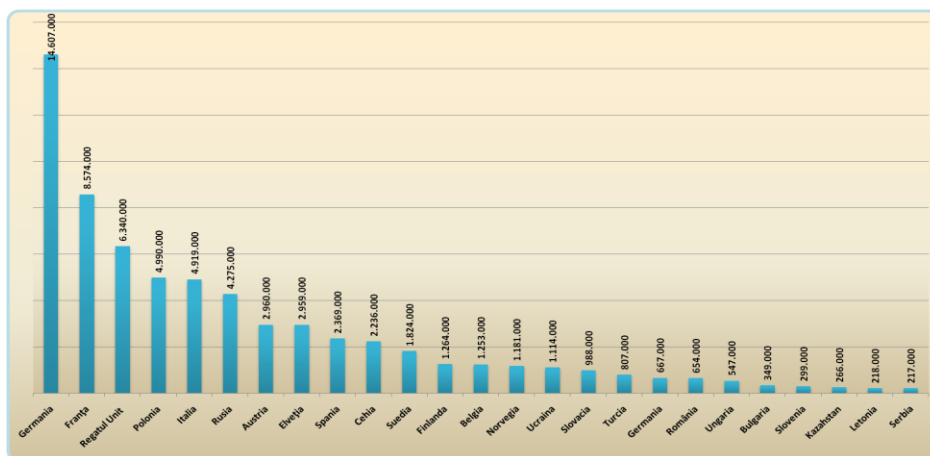
Tourists who have a minimum of training (the sporting type) are attracted to the more difficult slopes (they actually make up the clientele that returns almost every year). In the top of the preferences of European skiers are the slopes that have an inclination of less than 30 degrees (according to the specialists from Alpin Concept). European ski resorts attract a clientele coming from various nations (Asia, South America, the Arab countries, etc.) and nearly 80% of them are male.

According to Eurostat statistics regarding the *overnight stays of tourists* in hotels and similar accommodation units in Europe in the winter season 2017-2018, growth rates were recorded in most European countries, compared to the same period of the winter season 2016-2017.

Among the skiers who sojourn overnight in European mountain resorts, the World Tourism Organization reports show that only Austria has just over 60% *foreign tourists*, Norway and Switzerland just over 45% each, the Czech Republic and France about 35% each, Italy 25%, Germany 12%, Romania 5%. These statistics show that the base of tourists who come to ski in these countries is strongly represented by *domestic tourists*.

Regarding the *number of skiers*, in 2018 *Romania* ranked 19th (out of a total of 25 countries), cumulating 654,000 people who skied (see chart below). Of these, almost 95% were Romanian tourists and only 5% foreign tourists. The ranking is led by Germany, France, the United Kingdom, Poland, Italy, Russia, Austria, Estonia, Spain, Czechia, Sweden, Finland, Belgium, Norway, Ukraine, Slovenia, Turkey, Germany, Romania, Hungary, Bulgaria, Slovakia, Kazakhstan, Latvia and Serbia.

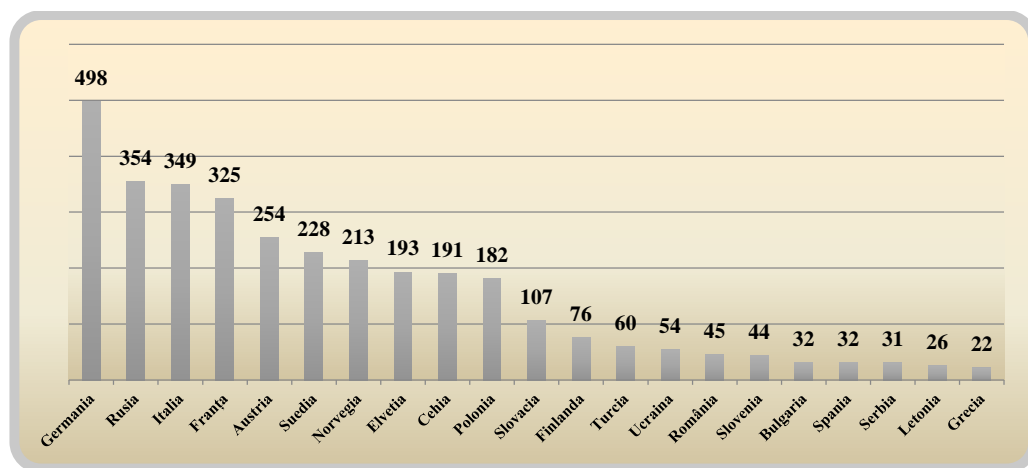
Number of people who practice skiing in Europe (2018)



Source: the Statista database

It is Germany again that held the lead in the ranking of **ski areas in Europe** in 2018 (it has 498 ski areas), a value ranking top in which **Romania** recorded the 15th place, with a total of 45 areas where one can ski (according to the chart below).

Number of skiing areas in Europe (in 2018)



Source: the Statista database

The main aspects related to the **current development trends of European countries** with a long tradition in the field of mountain tourism and winter sports are essentially related to:

- the efforts undertaken by the European countries with a significant potential in this field (mainly Switzerland, France, Italy, the Czech Republic) to develop the resorts in the mountain areas starting from the tourist adjustment and arrangement of the mountainscape, highlighting their natural resources and local traditions, so as to attract foreign tourists. At the same time, the **main concern** of those who manage the mountain resorts in the countries mentioned above is to ensure a **continuity of tourist activities** in all four seasons, by extending the ski season, using artificial snow cannons, developing grass skiing, organizing courses for mountaineering and various other sports for the mountain area (to attract tourists outside the winter season), the development and promotion of various tourist offers for the summer and winter season (by taking advantage of the presence of mountain villages near the slopes, lakes and resorts, and thus managing to lay the foundations of a type of agro-tourism throughout the year). The studies we consulted mentioned that the main reason why mountain resorts attract a limited number of tourists over one year is that skiing is perceived as a seasonal activity;
- in Austria and Switzerland, winter resorts were created by equipping older climatic or balneoclimatic resorts, by equipping and outfitting mountain villages with facilities and equipment specific to winter sports. Thus, currently the most sought-after, visited and **demanding resorts are those that have a complex profile** (both for winter sports – with the provision of conditions for all types of skiers,

beginners or advanced, and also for spa treatment, tourism for the summer season, ecotourism), the fees being set accordingly (for all types of tourists, with lower or higher pecuniary possibilities). It should be mentioned that all these resorts were *rebuilt and rearranged after building cable transport facilities*. The general trend has been for cable installations to be *connected to one another*, so that tourists do not have to wait (especially on weekends, when demand is higher). In fact, waiting to have access to the cable transport facilities is one of the main reasons for the skiers' concern (after fares, accidents and lack of snow);

- regarding the *accommodation* of tourists, it is done in various units (ranging from chalets, campsites and inns to luxury hotels);
- in terms of *food* and catering for tourists, the mountain resorts in the Alps again preferred to diversify their offer (while restaurants with a specific predominate, as well as those that offer elements of local cuisine). Chalets have been built that offer dining services (with traditional specific dishes) right within the skiing areas, so that tourists do not have to go down to the resort if they want to eat. There are also restaurants along the ski slopes;
- the “auxpieds” type facilities are being used more and more, which presuppose that all the *facilities and endowments are located near the slopes*. The access to the ski areas and to the ski slopes is made through various means, such as: own car, plane, helicopter, cable installations;
- nowadays, along with the slopes for downhill or alpine skiing (slalom), tourists are increasingly choosing the cross-country ski slopes;
- winter sports stays are increasingly sought after, which also include offers for families, beginners and seniors (given that the segment of mature and senior tourists is ever growing across the European continent). For all those categories wellness-type facilities, spa facilities, indoor swimming pools, tourist packages for recovery and relaxation have been built;
- another trend is that in almost every ski resort in the Alps there are *ski schools* for all age groups (this trend has emerged as a result of the growing number of people who want to ski). Skiing classes are usually held in November to December;
- in the resorts in the Alps about 20% of the clientele is represented by people who do not come to practice winter sports. For such people, it was decided to diversify the leisure range, and hiking trails or paths were built and rearranged, indoor and outdoor swimming pools were built (with hot water), various categories of bars and discos, sports fields, saunas, halls bowling alleys, ice rinks (natural and artificial), shows, festivals, competitions are organized, and also commercial nets were built (e.g. souvenir shops, food, art and antiques and sports equipment). As for hiking trails, they have been successful in Switzerland and Austria, being designed for walks without specific equipment, offering tourists who do not ski the opportunity to benefit from the high altitude climate and panoramic images;
- in general, the ski-pass fee includes transport, accommodation, use of cable facilities, ski lessons, to which various facilities are added, depending on the resort. The fees are structured according to the season (the peak season is

represented by the beginning of February and the end of March), depending on the resort, the favourable weather conditions, or not skiing periods, and the number of visitors;

- as mentioned above, a trend of recent years has been to lend **more and more importance and attention of mountain tourism in the summer season**. This trend was manifested by the building and equipping artificial slopes (an action that also tries to counteract the effects of climate change, and in which massive investment has been made), grass skiing, marking mountain hiking trails, development of speleo-tourism (outfitting and revamping caves and grottoes suitable for visiting), mountaineering, water sports, hunting and sport fishing, building conference and business centers;
- major investments are still being made, given the fact that snowboarding is growing in popularity (about 16% of tourists who ski in the Alps are snowboarders);
- climate change issues and environmental issues in mountain resorts have made their presence felt for a long time. The continued use of the same area and the pressure to extend the ski season have led to conflicts between supporters of skiing and environmentalists (who have already been successful in imposing restrictions on heli-skiing, ski slopes in the forest areas and construction of new cable facilities and installations).

All the countries that we have analyzed above are economically developed countries that operate in the mountain tourism sector based on a favourable natural potential, on the investment resources necessary for the arrangement of mountain fields, in order to practice tourist activities and with economic and financial profitability obvious over the years, reaching a high degree of development in the technical and material organization, through implementing large and expensive projects for the continuous reshaping, outfitting and arrangement of the mountain tourist space.

As far as **the future global development trends** are concerned, it is expected (according to experts¹) that the ski destinations in Eastern Europe and Central Asia will increase, which will however be materializes more slowly. For example, even though Poland, Slovakia and the Czech Republic have modernized their mountain resorts, tourist arrivals have stagnated. Moreover, other Eastern European countries with less developed winter sports infrastructure have failed to build the ski areas they had planned.

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