



Press release

2020 International Report on Mountain & Snow Tourism

Overview of key industry figures for ski resorts

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The 2020 edition of the International Report on Snow and Mountain Tourism has just been unveiled at an online press conference this Wednesday April 22, 2020 by the Swiss expert Laurent Vanat in partnership with the organizers of Mountain Planet, world's leading trade fair for the mountain development and industry which should have been taken place from April 22 to 24, 2020 in Grenoble / Alpexpo. Based on the winter 2018/19 figures, it presents rejoicing figures in a depressed covid-19 environment.

Highlight - the best ski season of the millennium!

The 2018/19 ski season presented in the 2020 International Report on Snow & Mountain Tourism report is the best of the new millennium as far as global visitation figures are concerned. It is a pleasure to see that despite adverse conditions the ski industry is facing, with climate change, increasing competition and the demographics, it still has the potential to feature globally 3 seasons in a row with growth. In today's depressed environment further to covid-19 abrupt closure of the 2019/20 season in most of the northern hemispheres' ski areas, this is heralding of a better tomorrow. It demonstrates the strength of the ski industry notwithstanding the current situation and allows dreaming that the 2020/21 season will enable to return to a high level of attendance at ski resorts all over the world.

During 2018/19 winter, United States ski areas recovered with excellent snow conditions and performed well above average. The country is back on the top of the podium for the 2018/19 season. Visitation level was the 4th best in the past 41 years. It may also have been boosted by the spread of the mega-passes that the enhanced competition created by the consolidation of the industry is heavily promoting. This trend, together with dynamic pricing, has also now reached Europe. Both are introducing a disruption in the traditional business model of the industry that is still viewed with a touch of scepticism in some places and not yet widely adopted. However, discounted multi-resort seasonal passes seem to have helped for the recovery of attendance at Swiss resorts for instance. Czech Republic, Poland and Slovakia are also featuring some interesting examples, which integrate interactive customer relationship management systems.

China has built a powerful ski-breeding infrastructure, even if it is not yet used to its full potential, with the development of ski training centres including ski simulators, dry slopes and a growing number of indoor ski halls. However, the industry there still needs to get more mature and has not yet found the golden way to introduce early beginners to skiing with a high customer satisfaction rate that generate a high level of returning guests. Unfortunately, western ski areas have nothing better to offer in support, as this has been for now 2 decades an unsolved pain point in European and North American ski destinations. In spite of this weakness, Chinese ski industry managed to sustain its growth and reached over the 20 million skier visits mark in 2018/19 season.

In Asia, Japan and South Korea still feature a worrying situation. When South Korea ended up showing continuously deteriorating visitation numbers, with a stabilisation in 2018/19, after 6 years of decline, Japan saw again lower attendance. After having stabilised over the former 2 seasons at a level that was about half than 20 years ago, Japanese skier visits figures were dropping again in 2018/19. Iceland and Scotland also experienced very poor seasons, due to bad weather conditions and lack of snow.

Despite the picture is not bright for all industry players, major ones have been favourably influenced in 2018/19 winter:

- A return to a better level of snowfalls in the United States;
- The growing Chinese market still stimulated by the 2020 Winter Games perspective;
- A recovery in some Alpine countries;
- A sustained growing trend in Scandinavia as also in the southern hemisphere;
- The end of the erosion of skier visits in the other western European countries.

All these contributed to make season 2018/19 the best of the new millennial.

A quote from Jimmy Petterson's¹ foreword to the 2020 report

How many pistes are there at North Korea's Masikryong ski resort? Are there any plans in the works to revive the defunct Algerian ski resorts of Tikjda and Chrea? Has the Pakistani ski center of Malam Jabba been rebuilt since it was destroyed by the Taliban? Are the ski pistes in Iran segregated or may men and women actually frequent the same trails? Laurent's report is where you will most likely get the answers to all these questions and much more. So, whether you are the mountain manager of a major Alpine resort or a poor ski bum hoping to locate the cheapest ski resorts, you are likely to glean some relevant information from Laurent in this document.

Coverage: *There are currently 68 countries in the world that offer equipped outdoor ski areas covered with snow. Even if snowfields are much more numerous, about 2'000 ski resorts have been identified worldwide. Besides the major ski destinations in terms of skier visits, there are a number of other, smaller destinations, where skiing has been an industry for a long time, or is currently developing. The most obvious new destinations are Eastern Europe and China, but there are a number of other small players spread out across the globe: Cyprus, Greece, India, Iran, Israel, Lebanon, Lesotho, Morocco, New Zealand, Pakistan, South Africa, Turkey and many more.*

François Heid, director of Alpexpo, organizer of Mountain Planet said: "It was important to maintain the presentation of the 2020 International Report on Snow & Mountain Tourism, the day when the 2020 edition of the fair should have opened. The next Mountain Planet will indeed take place at Grenoble-Alpexpo from April 26 to 28, 2022. We are already focused on this future edition, so that this international meeting of mountain planning, showcase of the most recent innovations and trends in markets, brings together the entire global mountain ecosystem (manufacturers, elected officials, communities, accommodation providers, operators of ski areas, etc.). I invite you to join on April 26 or 28, 2022 at Grenoble-Alpexpo".

¹ Writer & Photographer, Author of Skiing Around the World Volumes I and II, with ski experiences in 75 countries - www.skiingaroundtheworldbook.com

About Laurent Vanat: Besides his personal involvement in the sector of snow & mountain tourism, Laurent Vanat runs his own consulting firm specialized in business management, Laurent Vanat Consulting Ltd. He is working on economic aspects, in industries from all backgrounds, which go well beyond the snow and the mountain. One of his specialties is to assist companies in the study of their business plan. Laurent Vanat has been invited to present his report at various international meetings, including the OITAF Congress in Rio , those of the WTO in Andorra, Almaty, Tbilisi and Ulsan, Asia Pacific Snow Conference – ALPITEC/ISPO in Beijing, Mountain Planet in Grenoble, various meetings of the FIS and the meetings of Grand Ski in Chambéry , among others.

About MOUNTAIN PLANET: Created in 1974 in Grenoble, MOUNTAIN PLANET is the world's leading trade fair for the mountain development and industry. The next edition will take place from 26th to 28th April 2022 at Alpexpo, the event park in Grenoble, Auvergne-Rhône-Alpes (France). An international meeting place for mountain development, a showcase for the latest innovations and market trends, this major event for mountain professionals brings together every two years the entire global mountain ecosystem (industrialists, elected officials, local authorities, accommodation providers, ski area operators, etc.). It enables professionals in the sector to unveil innovations and the latest trends/technologies for sustainable mountain development in summer and winter. Each year, MOUNTAIN PLANET welcomes more than 900 exhibitors and international brands. Its exhibition area is 50,000 m². More than 23,000 professional visitors from more than 70 countries take part.

More information on : www.mountain-planet.com

You can download the full report with following link : www.vanat.ch/RM-world-report-2020.pdf

CONTACTS :

Laurent VANAT, Consultant
19, chemin de la Margelle
1224 GENEVA - SWITZERLAND
Tel / voicemail : +41 22 349 84 40
Web : www.vanat.ch
E-mail: info@vanat.ch

Relations presse : Alternative Media – Alexandre Bérard

Tel / messagerie : +33 (0)6 45 42 95 46
Web : www.alternativemedia.fr
E-mail: alex@alternativemedia.fr