

Ski Touring France

Knowledge transfer

Saksa, Hjerundfjorden



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1. Executive Summary

In the first quarter of 2018, Innovation Norway France' Paris office conducted a knowledge transfer project targeting the actors in the ski touring market.

France is a ski-nation and has a wide offer for all types of skiing on their own territory. The survey permits to indicate if- and in what way, Norway has added value to the existing offer in France to attract French skiers. Further it presents ideas on how to develop the ski touring destinations to capture the potential in the best possible way.

The goal of the project was to get more knowledge about who the actors on the segment are, how they work, who their clients are and what they seek. We studied French ski touring tour operators, relevant websites- and magazines, federations, associations and mountain clubs.

Three official federations supervise the discipline. Each with thousands of licensees and hundreds of clubs for leisure and competition throughout France. More than 250 clubs offer discovery, initiation and advanced training for ski mountaineering:
38 clubs dedicated to ski mountaineering competitions, and 209 clubs for leisure.

There is an increasing interest for ski touring in France. One of the indicators that talk for itself is a remarkable rise of sales of ski- touring equipment (doubled from November 2014 to October 2016, representing ca 8% of all ski equipment sales).

Out of 8,6M French skiers in 2017, the number of practitioners of ski touring is estimated to between 150 000 and 200 000. From 2014 to 2015, the activity has increased by 40% according to *Compagnie des guides* (Chamonix)

Ski touring is the only growing ski practice in France but as the activity demands physical qualities and a good knowledge of the mountain and a certain income, most actors think that ski touring will never be a mass market activity.

Innovation Norway's strategy points out sustainability as the leading curser for all touristic development. We aimed to find out about ski touring tourist's emphasis on the theme.

Sustainability is not a spoken need, but people practicing this sport put nature first and see the activity as sustainable "per se".

This project also shows some of the specific needs of the French traveler on the segment. It indicates that the French ski-touring tourist, although asking for comfort, puts guiding (in French), expertise, scenery, snow condition and security above luxury, other activities and local food. The actual skiing is the main goal for the trip.

One observation is that ski touring communication can inspire other types of skiing and put Norway on the mind map of consumers of adventure- and active holidays

Norway, despite it's beautiful and appealing nature, also faces many challenges due to high cost and limited availability concerning accommodation, transports and guiding services.

2. Methodology

The project was conducted in two phases:

Phase 1 was done through an internet-based desktop research based on existing knowledge to gather relevant operators and other actors.

The following sections were mapped out in phase 1: ref Excell doc.

- Tour operators who offer ski touring trips
- The most important websites/forums dealing with ski touring
- Ski touring magazines
- Ski touring associations, federations & mountain clubs

After defining relevant tour operators, we picked out the most important of these for phase two of the project.

Phase 2 was done by conducting telephone interviews with 6 different tour operators who propose ski touring tours. Most of them already sell tours to Norway, some not yet. One produces for several operators/brands. (Altaï)

The interviews were done in March 2018.

We hope the reader will get a better idea and enhanced knowledge about the French ski-touring market, from a tour operator's perspective. This includes target audience, understanding of success factors for suppliers, competing destinations and a sense of what criteria needs to be met for a country or region to succeed as a destination for the French ski touring segment.

3. Research on the Internet: Phase 1

The first mapping was internet-based desktop research where we answered several already identified questions within the topics mentioned in the introduction:

- Tour operators who offer ski touring trips
- The most important websites/forums dealing with ski touring
- Ski touring magazines
- Ski touring associations, federations & mountain clubs

4.1 Tour Operators:

We identified 14 French tour operators. We looked at their target audience, what types of trips the operator is offering, if they have an environmentally friendly focus, if they offer trips to Norway, and if they could be interesting for Norwegian suppliers. A few of these operators do not propose ski touring but other types of ski trips, these were not included in the phase two of the project.

4.2 Websites/forums/festivals:

We identified important websites with ski touring as the interest area:

The *Community Touring Club* which is an open ecosystem of ski tourers, free riders, competitors, shop brands, resorts and mountain professionals. It is worth mentioning the Big Up&Down event organized by Community Touring Club each year in Les Arcs, in the French Alps; *Ski Alpinism*, the official website for ski-mountaineering competitions, and *Skitour* the site/forum entirely dedicated to the discipline, 100% ski touring. Forums provide a large scale of all kind of information (the latest news, the weather, sharing of experiences, discussions about equipment...) and are important areas for exchanges between fervent skiers.

4.3 Magazines:

5 French magazines are specialized in ski-or snowboard with the word ski in the title – this shows the interest for the discipline and that there is an audience! One is entirely dedicated to ski touring - *Ski Rando Magazine*. Followed by *Ski Magazine*, *Skieur Magazine*, *Snowboard Magazine*, *Ski Chrono*: all for passionate and ski enthusiasts. Next to those, several well established outdoor, mountain and multi activities magazines regularly present articles about the ski touring discipline. Innovation Norway Paris have worked with almost all of these magazines by accommodating for journalists on press trips to Norway. These magazines are an important arena to promote Norway as a ski destination to the ski enthusiast public even if tour operators do not use this channel to recruit their targeted clients for the ski-touring niche.

4.4 Associations, federations and mountain clubs

We have mapped that the Ski Touring activity is represented by 3 federations, each with specific missions: the mission of the French Federation of Alpine and Mountain Clubs - FFCAM - is to ensure a widespread accessibility to an autonomous and responsible mountain practice; the French Federation of Mountain and Climbing - FFME – was in 1997 given the mandate to promote, develop and organize the discipline by the delegation of the Ministry of Health and Sports. The French Federation of Ski – FFS, - founded in 1924, is dedicated to the practice and the development of skiing in France, it resembles all French ski clubs and organizes competitions on the territory. FFS promotes skiing in all its form, including ski touring. The number of licensees of clubs affiliated to the three main federations mentioned above have doubled in 15 years. Olivier Mansiot, technical advisor for ski-mountaineering at FFME, give us an estimation of 150 000 to 200 000 practitioners out of which 20 000 are licensees in the discipline. Since practicing the discipline is free of charge, these estimates are based on federated practitioners and annual sales of equipment (ski bindings, skins, skis...).

4. In-Depth Telephone Interview: Phase 2

In the first phase we identified 14 different active holiday tour operators that offer ski trips. In depth interviews were conducted with 6 of them, chosen because of their importance due to volume and because they represent slightly different target groups. Almost all operators sell Norway today.

1) Which activities does the operator sell?

Two of the TOs are specialized in mountain activities summer and winter, one of them upscale expensive ones, the other is in Nepal spring and Autumn. Freeride/Heli ski, Alpinism, Mountain bike, via Ferrata for the first. The second Mountain sports Climbing, scrambling, writing books on these activities (Might be interested in writing a book about glacier walking in Norway) Develops tourism in underdeveloped areas. **A third company is specialized in Arctic activities**, the remaining, and also **the largest operators propose multiple activities** such as kayak and canoeing, photo trips, observation of fauna, hiking, trekking, cross country skiing, sailing, dogsledding, snow scooter... etc.

2) What kind of company do you represent?

One of the interviewees is an authorized mountain guide working under license as an agent (forfaitiste) (Serac Grenoble), all the rest are TO / TA thereof two also doing Incoming to the French Alps.

3) Which market(s) do you represent?

France for all the interviewed companies, Belgium for 4 of them as well as Canada and China for one.

4) Does the company offer ski touring activities in Norway?

Only one of the asked companies does not offer ski-touring trips to Norway but is planning to do so from 2019 (Paulo Grobel).

5) Where in Norway?

Allibert Trekking offers trips to Lofoten, Lyngen, Senja, Sognefjord and Ålesund.
The other ones are all in the Lyngen Alps, one in Lyngen and Lofoten and another in Lyngen and Svalbard. Most of the trips are for the moment produced in Northern Norway but there is some activity also in Fjord Norway.

6) Does the company have offices/ are represented in other countries than France?

GNGL products are sold in Switzerland and Belgium represented by Terre d'Aventure Altaï in Switzerland, Belgium (UK China (66 Nord) just starting). Paulo Grobel in Nepal Allibert Trekking in UK where KE Adventures are selling Allibert products.

7) How do you consider the development of demand for ski-touring tourism over the past years?

Half of the TO's (3) say there is an increase, 2 say large increase and one finds the market steady.

8) In which way will you characterize the demand?

The tour operators have similar answers to this question, here a resumé:

Client are generally between 30- 60 years old. It's a specific market, niche, for passionate and already initiated skiers and mountaineers. Clients have paying ability, they ask for instruction and competence. Paulo Grobel thinks that the Ski&sail activity triggers the guides in the French market to develop ski touring in Norway, also inland. The TOs mostly have regular clients, looking for new destinations ex. Norway, Iceland etc.

9) Can you say something about the size of the market for ski-touring?

Azimut have in 2018 40-50 pax to Norway, they will focus on getting max clients to the two products they have for the moment, then look for more places in Norway. **Product 1 in Lofoten** <https://azimut.ski/fr/trips/norvege-ski-de-randonnee-dans-les-lofoten> **Produkt 2** in the Lyyngen Alps <https://azimut.ski/fr/trips/bateau-ski-de-randonnee---alpes-de-lyngen>

The TOs all think the market will remain a niche but get bigger. They all think it is a cost sensible market, meaning that the products are not accessible for people without a certain ability to pay. The market has few actors with informed clients who know what they want. The competence from suppliers is crucial.

One interviewee stresses the great potential for new areas/ destinations in Norway, also inland.

10) What kind of accommodation do ski tourists prefer on ski-touring holidays?

All the TOs uses hotels, 50% mentions boat and 50 % cabins with self-service. (One uses tent for the cross-country skiing trips in Svalbard). Altaï are looking for a boat for next year for ski and sail in Lyngen or Senja. Otherwise, Rorbu is a sought-after alternative.

11) Are there special demands regarding accommodation facility needs?

The facilities can be simple but must be comfortable. Welcome, service and atmosphere are very important factors. Good examples mentioned: rorbu or the alpine camp in Henningsvær..

Good amenities and comfort, not too expensive. Problem in Lofoten: less and less capacity, more and more expensive concerning accommodation, therefore one operator wishes to buy their own building there ...

Services on location are important like logistics, bus shuttles, taxis - Transport...One TO suggests that hotels could manage these services. This could be a business opportunity?

Allibert Trekking mentions kitchen to make own food, accommodation with moderate pricing, no luxury... yet

12) How does your company consider the target group's willingness to Pay (WTP)

The WTP for accommodation in the total budget is average. This reflects the answers about accommodation above.

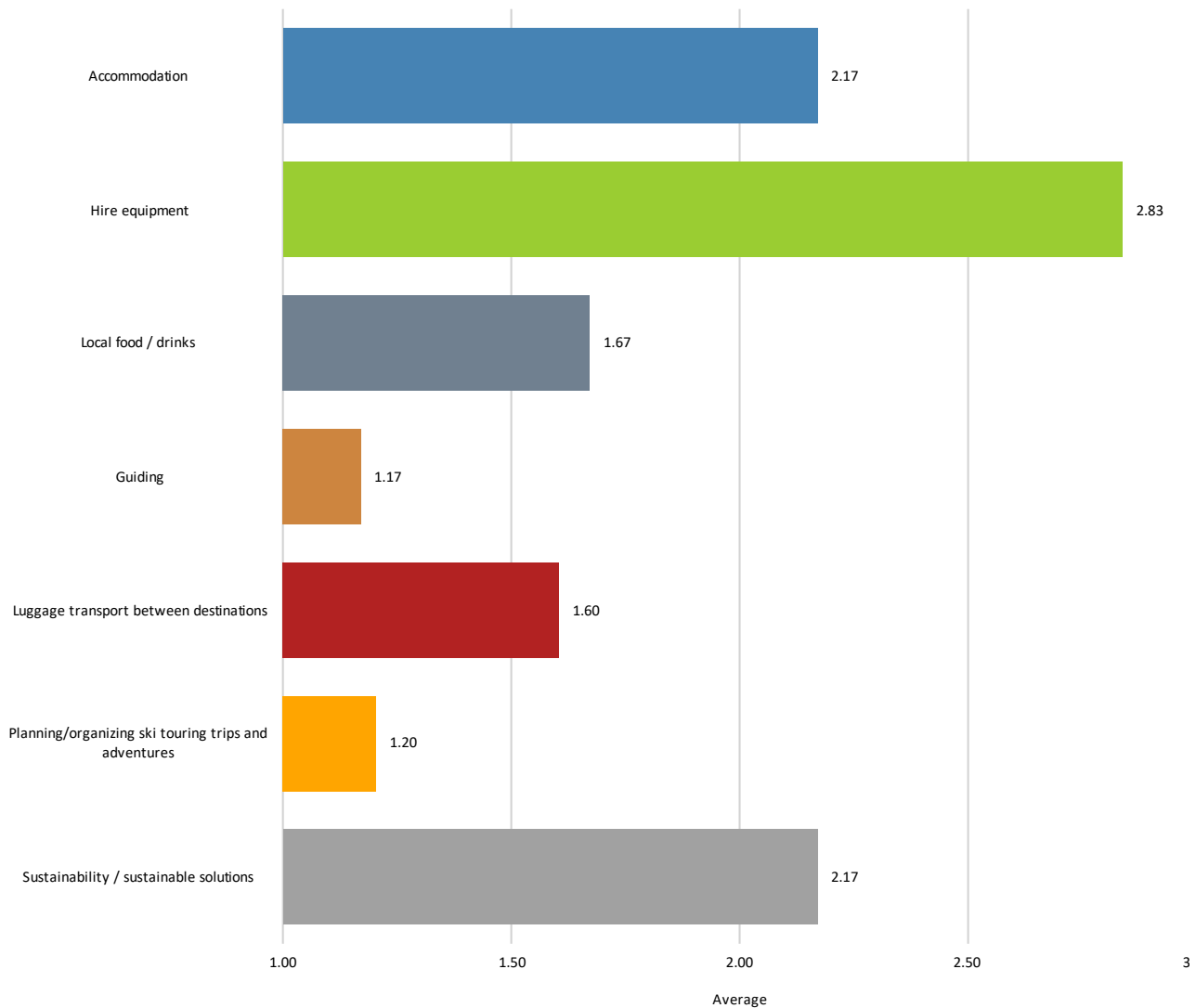
WTP for equipment hire is low as most skiers bring their own equipment.

Local Food is important but just over average WTP, this is the case also for luggage transport (this shouldn't be too expensive). Sustainable solutions have under average WTP.

The highest WTP is on the guide and for the planning and organizing.

The knowledge and competence is the core of what ski touring tourist want and need.

Question	Average	N
Accommodation	2.17	6
Hire equipment	2.83	6
Local food / drinks	1.67	6
Guiding	1.17	6
Luggage transport between destinations	1.60	6
Planning/organizing ski touring trips and adventures	1.20	5
Sustainability / sustainable solutions	2.17	6



13) How important is local food and drinks to your customers, when they are at a destination?

For two TOs local food it is very important. Azimut they have rather upscale clients and for Altaï. One TO does not know. The rest says local food is not that important.

14) Have your customers requested sustainable solutions for their ski holiday?

GNGL, doesn't know. Most of the TOs say there is no demand for sustainable solutions.

These operators and the ski touring activity is regarded upon as a sustainable activity unconsciously and "per se"

15) Are there other elements regarding the adventures that the ski touring tourists are willing to pay extra for?

The answers vary from TO to TO One has no demand for other elements.

Snow conditions!

Security and rescue services important!

"Not in our programs so far, they come essentially for the package we sell".

"Comfort and spa, not so many other activities because they are mainly there for the skiing and as the travels are only 8 days travel included, not so much time left".

Otherwise these elements were mentioned: Extension to go to Oslo + museums, whale watching, Aurora borealis activities, Culture + nature Sauna or hot bath tub

16) Any additional comments to the question above?

We received a comment concerning air transport: Concerning SAS and Norwegian: As tickets can be expensive ex. 500-700 € in some periods, the services on board does not reflect this price, as they are only offered a coffee or a tea and must purchase any other services. This has an impact on client satisfaction for the whole trip. This is important for them.

17) Do the ski tourists bring their own equipment, or do they hire on site?

All TOs say that the clients bring their own equipment.

Exceptions: They hire on site in Svalbard. Safety equipment is provided by the TO.

18) Is guide considered as important?

All the TO answer that they bring their own guide.

Guides are very important. Collaboration with local guides has started lately.

French speaking guides are essential, but there could be mixed guiding NO/FR, as a solution to the language challenge. Norwegian guides are sometimes too expensive.

19) What kind of ski touring holiday is most wanted?

Base camp with guided day trips is most frequent, then follows ski and sail and Haute Route.

The TOs have neither base camp with self-guided day trips, nor hire a car and go on your own, no guide

Comments: Azimut uses an old whaling skip, 66 Nord a sailing boat with motor

Paulo Grobel can have 2 different Base camps in one travel. Allibert Trekking wishes to start ski and sail.

20) What is the typical length of a ski touring holiday?

All ski touring trips in Norway with the interviewed TOs, last 7-9 days

Other places one of them has travels up to 14 days

21) What characterizes a typical booking?

The main rule is Individual bookings, rarely groups

22) What kind of groups?

If there are groups, it is GIR = groups of individuals or friends or colleagues.

No Incentives, very rarely teams, clubs or families.

23) When does the majority of bookings take place?

Most travels are booked 2-3 months before travel.

Azimut: 70% in advance, 30% last minute (this goes for all their travels not only ski-touring)

GNGL 80% in beforehand (6 months before) 20 % last minute = 1 to 1 1/2 month before

Altaï: 30% books earlier than 3 months in advance and 70% from 3months to 1 1/2 prior to the trip

P Grobel: Ski sail: Long time in advance

For other types of programs 2 months in advance – this can cause problems concerning aviation (availability and price)

Allibert mostly 2-3 months before, booking in November and December

24) How often does the main target group travel abroad for ski touring holidays?

The main target group travel once a year most commonly. Sometimes 2 times a year or less than once a year.

25) Other important information about the main target group? (special needs, requests, demands etc.)

The most important is to understand that the target group are passionate mountaineers and skiers who want to see something different from what they find in France, ex. ski with sea view or discover the arctic (Svalbard). They are changing destination each year.

One TO points out: 3 sorts of markets:

A) One market drags the other: Norwegian guides inspire French guides

B) Those who travel on their own are more trained skiers and they go also inland to ski.

C) This kind of niche segment is a good way to stretch the seasons.

26) Which countries/destinations are on the ski touring tourist's bucket list?

Countries mentioned by the TOs are: France, Italy, Austria, Switzerland, Norway, Iceland, Greenland, Georgia, Slovakia, Poland, Canada, Japan

Comments: Travels to Nepal are seen as "expeditions" travels to other destinations = "Travel"

GNGL: " We only offer Norway, sometimes we get requests for Iceland and Greenland for ski touring, this is because of the nature of our activities, we are specialized in arctic travels, so it's not natural to ask for ex. Italy or other countries in other hemispheres".

27) Which are the most important success factors for destinations developing ski touring tourism?

Snow conditions, beautiful nature, ski with sea view and difference from own country.

Unique environment that offers more than France, the particularity of the destination.

The fact that the destination is less developed creates good opportunities. Otherwise, exclusivity, novelty, good accommodation, comfort, are important factors

Better transports, new zones, no crowds, good prices, inspire people to go

Communication = get the message out, even in summer. Explain the different regions in Norway:

Ex: "the 5 best regions for Ski touring» Top 5 or Top 10 etc...

28) What are the challenges for Norway as a ski touring tourism destination in order to succeed?

Success already!

More notoriety, promotion and communication of the different regions where ski touring is possible towards the TOs and producers

Accessible formulas price wise.

One challenge would be not to develop too much, people come for silence, snow quality and traditions... and no crowds!

Continue the development even inside the country without boat. Ski and sail triggers but opens for other types of development also.

Norwegian guides knowing French are needed.

The Quality and variety of accommodation is worth looking into; Ex. Eco lodge, sport lodge, farms within the local life.

The service and welcoming of guests are crucial elements

Build up clusters, have a large vision of development and take concern to the architecture of the information.

Weather conditions and probability for good snow conditions.

29) Which channels do you use in order to reach the main target group?

All say through internet, websites, Social media, very few go through outdoor magazines. No fairs and no printed press. (OBS! For this particular segment, eks, Allibert Trekking are present on fairs and festivals for their overall offer)

Other channels;

Word of mouth between regular clients, event evenings, The guide's Facebook pages, films and photos from ski touring travels.

There is an agency that gives service to individual guides: SERAC in Grenoble.

Contact them for more info, they know the variety of the different travels ...

www.skipass.com

www.ski-rando.fr/

30) Who, in your opinion, are the most important bloggers or other social media influencers? (NB! the TOs vision)

"In France bloggers are not important on this segment".

Did not get any names from the TOs, they did not know them.

Ski guides are the real influencers with-in the segment, according to them.

31) Which are the most important skiing/outdoor magazines?

The TO's mention these:

Ski Rando Mag www.Ski-rando.fr

Powder

Montagne Magazine, paper edition

Alpine Mag = webmag

Skipass Magazine

Wider

Two TOs do not know the magazines and don't communicate in them

32) Are there any other interesting/relevant comments from the interview?

"Interested in partnerships with Innovation Norway, (promo, fam-trips etc..)"

"We are interested to learn in contact with Innovation Norway about new opportunities for ski touring in other regions than we produce so far".

"The specificities in Norway, can be a driving force for motivation to come, Ex Vikings Myths..."

"Marketing about skiing also leads to increasing demand for snowshoeing and other activities."

"Norway is very visible"

"Innovation Norway's presence in the B2B market important to help developing new destinations in common"

"Interested in partnership in marketing new circuits."

NB! Vidian (Allibert Trekking) wishes to hear result of this survey (concerning all countries) possible?

5. Conclusions and Recommendations

Throughout this survey we found that there is a significant and increasing demand for practicing ski-touring.

Ski touring has literally exploded these recent years in the vicinity of French ski resorts. Through dedicated trails, events and initiations, equipment brands, professionals and ski resorts accompany this development to make things easier and more secure. The last 2 years, the event " *the BIG débat*" initiated by Community Touring Club <http://communitytouringclub.com/big-debat/> gather professionals - brands, retailers, ski resort managers and institutions – to exchange about the growing discipline (how to accompany, help and promote ski touring). Around the table this year (february 2018) were: Bruno Bertrand for *Salomon*; Pierre-Jean Touchard for *Dynafit*, Caroline de Wailly for *ZAG*; Philippe Janin for *Les Arcs*; Philippe Goy from *Vertical Mountain*; David Giraud from *My-Ski.fr*; James Blanc from *l'ESI (école de ski international)*.

"Ski touring is a great way to enjoy a different kind of experience in the snow and taste the freedom of wide-open spaces. A number of ski resorts are keen to offer people the chance to try it out in a safe and managed setting this winter. Breath-taking descents, access to wild and untouched places, powder snow up to your knees – ski touring offers purists unique freedom, far from the busy ski areas and in the heart of unspoiled nature.

But this sport of dreams – and even fantasy – needs to be approached with care and respect. For a safe introduction to this activity, you need to put yourself in the hands of mountain specialists who will teach you the correct approach to ski touring." says France Montagnes.

France Montagnes is an association that brings together the major players within the mountain tourism industry of France. The objective of France Montagnes is to promote the French mountains on a national and international level.

Even if France has a large offer of places to practice ski touring, there is a potential for Norway in the French market because we can offer added value such as the possibility of skiing with a sea view, to practice ski and sail, the vast unexploited areas with untouched snow and no cueing with other skiers, longer seasons with a high probability of good snow conditions.

Ski touring tourists seem to fit our strategy for tourism development in Norway:

The fact that these types of tourists (apart from flights to come here) have a low impact on nature, goes well with our aim for sustainable tourism, so does the fact that this niche contributes to prolonged tourist seasons and thus create opportunities and work for suppliers all year round. Ski touring is possible in large areas in the north, in the Fjord region and other mountain areas, and not only in winter. The activity could help to get more activity in shoulder seasons in high mountain areas.

We have also learned something about the challenges for the development.

Costs: Even if people have a good ability to pay, it is a challenge to keep prices in check to fit the quality offered.

Tour leading: The guides are crucial for this segment, not only for the organizing and tour leading but as we have seen above, for the communication and promotion of potential destinations. French tourists like having guides in their own language and it is therefore more cost efficient bringing French guides on the tours. There seem to be an opportunity that Norwegian guides team up to work with French guides.

Accommodation: The accommodation can be simple but must be comfortable, with possibility to cook the skier's own food. There is a lack of these types of accommodations in some periods, but here lies a chance to invest, invent and develop.

Transportation: For land programs, transportation is a challenge when it comes to availability and costs.

Communication: Norway is vast and difficult to understand, so the information should be easy to find and simple to understand, ref. example: 5 best spots to do ski-touring etc.

For this niche segment the most efficient channels to reach the consumer are somewhat narrower than for other segments which, could also be seen as an opportunity to reach a niche audience.

Connections, relations and personal contact with relevant tour operators and guides is important to develop the market further.

Sales channel: The new web platform Adrenaline Hunter can be a good channel for direct marketing and sales <https://www.adrenaline-hunter.com/fr-FR/rechercher-par-sport-et-spot/neige/ski-de-randonnee/comte-de-more-og-romsdal/124-1216-2049>

Development: One of the most important added values for Norway as a ski-touring destination, is that skiers can enjoy vast areas of untouched snow without cueing with too many other skiers. This value would disappear if some areas get overexploited or are developed in a wrong way, eks. By opening up to heli- or catskiing. A good idea would be to plan nation- regional or cluster

6. References data – Tour operators

Name of Company	Allibert Trekking	ALTAÍ 66 Nord	UCPA
URL	http://www.allibert-trekking.com/ski-de-randonnee.htm	http://www.66nord.com/	https://www.ucpa-vacances.com/
Phone	+33 (0)4 76 45 50 19 Vidian	nicolas@66nord.com Nicolas Bichet	Voir Nicolas Bichet Altaï (66 Nord)
Mass or Niche	Niche	Niche	
Description	Ski rando, ski rando Nordique ski de fond	ski nordique et de randonnées	
Season	Winter / spring	All year	
Target Market	Privat, not lux, GIR , hiking clubs,	Private, not lux, GIR	
Level of Experience	Initiation in France Norway niveau 3	Niveau 3	
Themed Tours	Ski randonnée, Off piste skiing, cross country included in multiactivity programs	Yes	
Destinations	Div. Europe (incl. Norway +Spitzbergen), Japan, Marocco, Iran, Greenland	Alaska, Antarctique, Canada Div. Europe (incl. Norway), Mongolie, Russia	
Standard or Customized	Both	Both	
Custom	Custom or taylor made trips	Custom or taylor made trips	
Packaging	Flights, full pension, guides included	Base packages BB with options to activities	
Prices	Reasonable	Reasonable	
Additional Activities	Yes Hiking	Yes	
Norway?	Yes + Spitzbergen	Yes Ski in Lyngen, Lofoten	
Sustainability Focus	Yes !	Yes	
Safety Focus? (Avalanche)	Yes safety kit	Yes	
Online Bookings	Yes	Yes	
Brochures	Yes but not for ski yet		
Potential for Norway	Yes they are continuing the developpement	Yes wants to develop, 66 Nord is	
Comments	This is one of the most important operators for aktive holidays and they wish to continue developping ski products in Norway		

6. References & data – Tour operators

Name of Company	Terre d'Aventure	GNGL	Chamina
URL	https://www.terdav.com/lm-ski-de-randonnee-et-freeride-859	https://www.gngl.com/	http://www.chamina-voyages.com/randonnees-hiver
Phone	+33 1 53 73 76 85 Caroline Laurent	+33 (0) 1 40 46 05 14 Dominique Albouy	Fabrice Weber
Mass or Niche	Niche	Niche	Niche
Description	Ski Rando Ski de Font Ski Nordique	Ski Rando Ski de Font Ski Nordique	Randonnée ski nordique
Season	Winter spring (All year for other activities)	Tout saison Northern destinations and southern hemisphere	All year
Target Market	Groupes, wants to develop FIT	Sporty people between 30-60 years to Spitzbergen, Norway more confort larger profile mostly GIR	
Level of Experience	level 3 in Norway	level 3 in Norway	
Themed Tours	Ski and sail	Ski and sail	Culture, winter, Pilegrimage, CE and Associations, recurrent hikes, new years travels
Destinations	France, Italiy, Norway		
Standard or Customized			
Custom	yes	Yes	Yes
Packaging	Full package with guides and full pension	Full package with guides and full pension	
Prices	Reasonable to expensive		
Additional Activities	Yes ,Sow shoe, dog sledding, Hiking, bikikng, cruises, kayak, snorklin		Hiking, biking, Trail ,dogsledding wellness/spa,
Norway?	Yes + Spitzbergen	Yes + Spitzbergen	Yes Fjord Norway, Lofioten and Vesterålen , Cap Nord, Oslo Bergen
Sustainability Focus	Yes!member of Agir pour un Tourisme Responsable (ATR).	Founder and member of ATR (Agir pour un Tourisme Responsable), certified for Responsible tourism by l'AFNOR Certification since Déc 2009.	
Safety Focus? (Avalanche)	yes	yes	
Online Bookings	yes	yes teaser	
Brochures	yes	yes	
Potential for Norway	Wishes to further develop FIT ski products and group trips		
Comments	Terre d'Avepture is a brand in the Groupe Voyageurs du Monde.Collaborating with GNGL on production	GNGL is a brand in the Groupe Voyageurs du Monde.Collaborating with Terre d'Aventure for production	

6. References & data – Tour Operators

Name of Company+D1A1:D21	Visages Terre du Syd	Ski-rando.fr et Alta-Via	Grand Angle
URL	https://bit.ly/2rvihsk	http://www.ski-rando.fr/	http://www.grandangle.fr/
Phone	Mazet Philippe 04 92 45 18 05	+33 458 00 17 11	
Mass or Niche	Niche rando all year	Niche	Niche / All public
Description	Ski rando	Alta- Via Association regisrered in Atout France Ski Rando	Only cross country and mountain ski
Season	All year	Winter, but Alta-Via all year	All Year
Target Market	People interested in randonnée all ages , family	Families, groups and individuals from niveau 1 to 4 meaning moderate to sportive people	All ages, Asso, clubs, CE, Families, Seniors..
Level of Experience	Level 4 for ski rando in Norway	level 1 to 4	all levels
Themed Tours			Yes nature, culture, sport, relaxation and encounters ;
Destinations	For ski rando: Monténégro, Arménie, Slovénie, Iran, Maroc : les 4000 de l'Atlas à ski de rando, Europe	Customized	All continents, see here for details: http://www.grandangle.fr/destinations/
Standard or Customized	Paquages with option and supplements	Both	Both
Custom	Yes	Yes for smaller groups	Yes
Packaging	Full paquage with flights	Activities inclusive of guide	Yes
Prices	Resonable		Resonable ++ (taylor made)
Additional Activities	All types of hikinng and trekking, snowshoes and bike	Alpinisme , climbing, hiking	hiking and trekking with or without guides, biking with or without guide, Cross country skiing, Snowshoeing, kajak and canooing,
Norway?	Yes Alpes de Lyngen	No	
Sustainability Focus	Not especially mentioned on their site	Yes	YES. MEMBER OF " Agir pour un Tourisme Responsable". AND labelled European charter for sustainable tourism in protected areas
Safety Focus? (Avalanche)	Insurance	Yes	
Online Bookings	Yes	Yes	
Brochures	Yes	no	yes
Potential for Norway	Yes in other areas?	...	Yes but not for Ski Touring

6. References & data – Tour Operators

Name of Company	Paulo Grobel	Tarentaise Tours	Nomade Aventure
URL	http://www.paulogrobel.com/ski-de-randonnee/	http://www.tarentaise-tours.com/welcome	https://www.nomade-aventure.com/
Phone	+33 (0)4 76 79 99 68	tel:+33457376565	01 46 33 71 71
Mass or Niche	Niche	High end	All public
Description	Mountain guide organizing expeditions and tours.	Tour Operator ad Agency, FIT, groups CE, insentives Events	TO since 1992 created already in 1975 as asso. No 3 in FR on adventure travels, 40 pax work there and 4 agencies Paris, Lyon. Toulouse Marseille
Season	All year	All year	All year
Target Market	High level sportive people but also inition to ski -Rando	FIT , Groups, CE, corporate high end	FIT, groups and Families
Level of Experience	advanced know all types of ski	All levels but rather sporty public	All levels
Themed Tours	Yes cultural alpinisme	Yes	Yes, ex Culture and Civilizations, Immersion, solidarity
Destinations	Alpes (La Grave) in winter, Himalaya and Nepal rest of year	France, Island Russia, Italie and Colorado	Global
Standard or Customized	Customized	Customized	Both
Custom	Yes	Yes	yes
Packaging	No	A la carte and activity packages	Yes
Prices	Resonable, pay the guide	From resanable to high	Resonable
Additional Activities	Alpinisme , hiking /trekking, cultural visits. Courses.	Snowboard, snowshoeing heliski, bobsleigh, multiactivities, events and evenings, Climbing, via Ferrata, Alpinism, whitewater, paragliding	A multitude of activities and rhemes ; https://www.nomade-aventure.com/cartographie/destination#themes
Norway?	No	No	Yes Oslo, Fjords Norway Northern Norway and Spitzberg
Sustainability Focus	Yes , in the learning program, how to leave no traces and how to respect nature.	? Does Heliskiing... No sustainability focus on their website	YES MEMBER OF " Agir pour un Tourisme Responsable ATR are about to be certified Ecocert Sustainability, respect for the people and cultures are the heart values of this TO's around which the trips are taylored
Safety Focus? (Avalanche)	Yes , ANENA memeber(Association Nationale pour l'Étude de la Neige et des Avalanches, courses	Multisport Insurance	Yes , general security for their passangers communicated on their website, not specially avalanches
Online Bookings	Yes, inscription		Yes
Brochures	No		No
Potential for Norway	little potential and if, only for few people with their guide.	Could be ! has travels to Italy, Island, Russia and Colorado , Intereseting TO/TA	Yes but maybe not for ski touring,, Other labels in Voyaheurs du monde will do that activity: Allibert or GNGL ..
Comments	Could be a good voice for Norway, if ever invited to experience there, he has his own blog.		Cross country skiing and snowshoeing , not Ski Touring.

6. References & data – Tour Operators

Name of Company	AZIMUT	La Compagnie de guides de Chamonix
URL	https://azimut.ski/	http://www.chamonix-guides.com/
Phone	+33 (0)4 92 23 07 24	00 (33) 450 530 088
Mass or Niche	Niche	Mass
Description	Independent TA/TO situated in Briancon France, makes their own travels, high quality service	Founded in 1821, 1st and biggest guide company in the world, over 240 independent guides. Working in the alpes and mountains all over the world.
Season	All year	All year
Target Market	For passionate mounteneers and skiers	All public
Level of Experience	All levels	All levels
Themed Tours		yes
Destinations	France, Italie, Austria,Switzerland Norway, Iceland, Georgia,	1 trip Nepal (Alpinisme) , 1 Ski Rando Iceland, 1 Ski Rando Chile, Iceland, Switzerland Italie
Standard or Customized	Programs are adapted after the weather conditions	
Custom	Yes	Customized Ad Hoc ?
Packaging	Package on location all included, air ticket not included	Package on location all included, air ticket not included
Prices	High	High
Additional Activities	Freeride/Heliski, Alpinisme, Mountainbike, via Ferrata	Multitude of summer and winter activities: Winter: Off pist skiing, heliski, snowshoeing, snowboard, winter climbing
Norway?	Yes, ski and sail Lyngen, Ski rando Lofoten	No
Sustainability Focus	Not in any visible way, not communicated	Yes , have some activities around the theme: http://www.chamonix-seminaires.com/91-nos-activites-eco-responsables-.htm
Safety Focus? (Avalanche)	Yes, are offering courses in Avalanche security and security and the guides decisions is explained here https://azimut.ski/pages/les-choix-et-les-decisions-de-nos-guides	Yes ! Security is underlying all their activities.
Online Bookings	yes	yes
Brochures		
Potential for Norway	Should be as they already have 2 products Lyngen and Lofoten, why not Fjord Region?	Constituated groups?Maybe ad-hoc travels?
Comments	Interesting to follow up	

6. References & data – Ski websites and forums

Skiing Website / Forum	Community Touring Club	Ski Alpinisme	Skitour (Forum)
URL	http://communitytouringclub.com/	http://www.ski-alpinisme.com/definition.php	http://www.skitour.fr/
Contact	http://communitytouringclub.com/contact/	Olivier Mansiot - National Technical Advisor for FFME in charge of ski mountaineering	-
Phone		Tel : 06 76 41 47 62 / e-mail : o.mansiot@ffme.fr	
Target	Open ecosystem of hikers, free-hikers, ski-runners, shops, brands, resorts, mountain pros	The official website for ski-mountaineering competition	Beginner, unscrambled or confirmed, a competitor, skipper or freeskier
Interest Area	Ski Touring	Ski-mountaineering competition	100 % ski touring
Followers/Likes	85 000 UV		
Selling Tours	No	No	No
Themed Content	CTC is a community program that blew its first candle in September 2014! Which material to choose? Where to practice? With whom ? How? CTC humbly offers answers to all these questions and seeks to create virtuous circles among all those involved in all forms of ski touring.	The official website for ski-mountaineering competition	Site entirely dedicated to ski touring. Whether you are a beginner, an unscrambled or a confirmed, a competitor, skipper or freeskier you will find on skitour a space to exchange, to inform you about the snow conditions, to choose your equipment, to organize your next outing or your next trip, share your experience or just dream. Skitour, it's you, make it live!
TO Aligned	No	No	No
Key Personalities	Gino Decisier & Guillaume Desmurs with Kilian Jornet, Enak Gavaggio, Cédric Pugin	No	No
Advertising Cost	No	No	No
Creative Ad Formats	No	No	No
Social Media Platforms	FB, Twitter and Instagram	https://www.facebook.com/ski-alpinisme-france/	https://www.facebook.com/skitourfr/
Event	Big Up&Down		
Event Website	http://communitytouringclub.com/big-up-down-concept/		
Potential for Norway			
Comments			

6. References & data – Ski websites and forums

Skiing Website / Forum	Outdoor Expert Forum	Camptocamp.org
URL	https://www.outdoorexperthforum.org/	https://www.camptocamp.org/
Contact	contact@outdoorexperthforum.org	https://www.camptocamp.org/articles/106727/en/contact-us
Phone	06 79 28 52 70	
Target	Recognized since 2002 as the leading French outdoor industry publication by key opinion leaders and decision makers, Outdoor Experts provides an outlook across all aspects of the industry	Mountain sports community : ski touring, mountain climbing, rock climbing, ice climbing, hiking, snowshoeing, paragliding, mountain biking, via ferrata, slacklining
Interest Area	Sports nature	Mountain sports
Followers/Likes		
Selling Tours	No	No
Themed Content	market trends, brand and equipment, manufacturer news, outdoor retail news, changes in how people play in the outdoor, tourism strategies, event organizing	Camptocamp.org aims to facilitate information sharing between mountain addicts and contribute to the safety of mountain activities. Topo guide, forum, articles
TO Aligned	No	No
Key Personalities	No	No
Advertising Cost	No	No
Creative Ad Formats	No	No
Social Media Platforms	https://www.outdoorexperthforum.org/blog	https://www.facebook.com/camptocamp.org/
Event		
Event Website		
Potential for Norway		
Comments		

6. References & data – Ski Magazines

Magazines	Ski Rando Magazine	Montagnes Magazine	Ski Magazine
Contact	Sylvio Egea	Fred Labreux	Mathieu Ros Médina
Mail	redaction@skirandomag.com	fred.l@montagnes-magazine.com	mathieu@skimagazine.fr
Tel	+ 33 (0)6 89 40 09 47		+33 (0)6 24 21 21 85
Tourism Focus	The magazine dedicated to ski touring and splitboard. Reports about ski touring in France or abroad, ski touring material tests etc..	100% mountain magazine multi activities: hiking, mountaineering, climbing, ski touring, trail, via ferrata	The Leader Magazine of the Grand Ski Matter tests, freeride and freerando trips, ski resorts and ski trips, events, etc.
Target	Freeriders	Adults, CSP +, hyper-practicing, hyper-consumers, multidisciplinary (5 activities on average) of all categories: contemplative, family or more sporty (professionals or amateurs). Men 30-45 years	For skiers who have the means to live their passion to the full, from large European estates to luxurious lodges with skis or helicopters. Skiing is a passion and a way of life: firewood, good food, beautiful skis, spa, cocktail, our readers seek above all pleasure and freedom, without hindrance. 80% men 30-50 years
Distribution	Kiosk and subscriptions - France	kiosk and subscriptions - France	kiosk and subscriptions - France
Publish Frequency	4 issues/year	14 issues/year	5 issues/year
Lifetime	Issue 31- Feb/March/April 2018	For over 35 years the leading brand, known and recognized by the mountain community	
Website / URL	- http://www.skirandomag.com/	http://www.montagnes-magazine.com/	- http://www.skimagazine.fr/
Advertising Cost A4 side	2 000 EUR	4 900 EUR	4 400 EUR
Circulation	35 000	45 000	41 000
Potential for Norway	Yes	Yes	Yes
Comments			

6. References & data – Ski Magazines

Magazines	Skieur Magazine	Snowboard Magazine	Ski Chrono du Dauphiné Libéré
Contact	Mathieu Raynaud	Mathieu Ros Médina	Laurent Davier
Mail	mathieu.raynaud@skieur.com	mathieu@skimagazine.fr	
Tel	+33 (0)4 76 70 54 11	+33 (0)6 24 21 21 85	
Tourism Focus	The ski reference in all its forms (track, freeride, freerando, racing, freestyle). All the variants of freestyle racing with a focus on freeskiing.	The historic title of snowboarding in France (1992). An editorial approach based on openness and accessibility to speak both to the newcomer and the expert while showing the essence of sport: the pleasure of a rider	The magazine of the ski competition in all its forms. Alpine, Nordic, biathlon or freestyle, it immerses himself every month in the news and behind the scenes of the competition. With the intervention of champions, journalists specialized in each discipline and experts, it is the essential meeting for enthusiasts
Target	Global ski media for both skiers passionate and demanding in search of the latest news, and more casual skiers looking for advice to progress and choose equipments. 85% Men 25-45 years	Snowriders - 87% Men 25-45 year	
Distribution	kiosk and subscriptions	kiosk and subscriptions	
Publish Frequency	Every 2 months - 8 issues/year		5 issues per year
Lifetime	Issue 138 - Januar/Februar 2018	Created in 1993	Since 2006
Website / URL	http://www.skieur.com/	http://www.snowsurf.com/	http://www.ledauphine.com/skicrono
Advertising Cost A4 side	4 000 EUR	3 700 EUR	
Circulation	41 000	25 000	
Potential for Norway	Yes	Yes	
Comments			

6. References & data – Ski Magazines

Magazines	Wider	Outdoor Go !	30 degrés magazine
Contact	Sylvain Bazin	Christophe Delaporte	Christian Bugnon
Mail	sybazin@gmail.com	redaction@outdoorgo.com	christian.bugnon@cbcommunication.com
Tel	+33(0)4 76 70 92 86		+41 79 204 37 90
Tourism Focus	Outdoor magazine multi activities: aventure, trail, kayak, ski, snowboard, rando, trek, VTT, sail	Thematic approaches, targeting the different outdoor activities, escapes proposed in France and / or abroad	In June 2002, sports and leisure joined forces in a single magazine: 30°. Published in French and German, as well as in English, since November 2012 for special editions, 30° has positioned itself as a provider of excitement.
Target	High-end sports-oriented 100% nature. Active, urban, sporty / 85% Men 30-45 years	Hyper-practicing, hyper-consumers, multidisciplinary of all categories: contemplative, family or more sporty (professionals or amateurs)	Urban, active consumers engaged in sports, recreational activities and travel. Two-thirds (67%) of 30° readers are in the 26–45 age bracket! 25'831 men and 22'004 women read 30° regularly. Men 54%, Women 46%
Distribution	kiosk and subscriptions	Kiosk in France	Kiosk and subscriptions - France, Switzerland
Publish Frequency	5 issues per year	5 issues per year	9 annual issues (5 national editions + 4 special issues)
Lifetime		Created in February 2017	Since 2002
Website / URL	http://www.widermag.com/	http://www.outdoorgo.com/	http://www.30degres.ch/
Advertising Cost A4 side	5 400 EUR	4 500 EUR	8 000 EUR
Circulation	50 000	60 000	47 835
Potential for Norway	Yes	Yes	Yes
Comments			

6. References & data – Ski Magazines

Magazines	Geo Aventure (Hors Série GEO)	Respyr
Contact	Eric Meyer	Olivier Domecq-Cazaux
Mail	emeyer@prismamedia.com	v.o@respyr.com
Tel		+33 (0)5 62 26 14 88
Tourism Focus	Recognized as an expert in the field of image and travel, GEO comes in a special Adventure Series and sets out to conquer readers eager to explore the world. Adventurous reports and spectacular photographs.	Hiking, mountain biking, trail running, climbing, skiing, ski touring, freeriding, mountaineering ... RESPYR dissects all the passions under the prism of accessibility and discovery
Target	GEO Adventure is a spokesperson for a community of modern adventurers where freedom, sharing, adrenaline and a pioneering spirit are key words.	Active, CSP +, Men 25-35 years. Wide readership : hikers, skiers, snowboarders, climbers, mountain bikers, mountaineers ...
Distribution	Kiosk and subscriptions - France	Kiosk and subscriptions - France
Publish Frequency	2 annual issues Hors Série	5 annual issues
Lifetime	New! Since 2017	Since 2002
Website / URL	https://www.geo.fr/en-kiosque/geo-aventure-le-nouveau-ne-de-la-famille-geo-174506	www.respyr.fr/
Advertising Cost A4 side	12 800 EUR	2 600 EUR
Circulation	7 000	8 000
Potential for Norway	Yes	Yes
Comments		

6. References & data – Ski Organizations

Federations, associations & clubs	Fédération Française des Clubs Alpins et de Montagnes	Fédération Française de la Montagne et de l'Escalade FFME	Ecole de ski Français ESF
URL	http://www.ffcam.fr/	http://www.ffme.fr/	https://www.esf.net/
Contact	Eva Poulichet (Directrice) / Niels Martin (Com)	M. Mansiot tel 00 33 (0)6 76 41 47 62	-
Phone	01 53 72 87 52 / 06 30 92 11 54	+33 (0)1 40 18 75 50 (Charlie)	
Members	95,000 licenses (38% women) in 385 clubs and 52 territorial committees throughout France	96 759 licenses / from 10 000 to 20 000 licenses in Ski Rando in 15 years	Est. 1945. 17,000 instructors in 250 offices. Ecole du Ski Français is the largest ski school in the world, with 2,000,000 pupils taking 800,000 tests every year.
Target	Contributes to the training and safety of mountain users, to regional planning and the protection of the natural environment, to the development and transmission of a mountain culture.	Founded in 1945, the FFME promotes and develops six sports activities in France: Climbing, Mountaineering, Canyoning, Mountain Hiking, Snowshoeing and Ski Mountaineering.	ESF offer Ski Touring lessons in all of our resorts in France. Book with a qualified ESF instructor and guide to experience the freedom today.
Characteristics	Multi-sports Federation, the French Federation of Alpine and Mountain Clubs offers various activities to practice in the mountains: mountaineering, hiking, climbing, mountain skiing, snowshoeing, air sports, mountain biking, canyoning, caving, etc.	The FFME is the delegated federation for Ski Mountaineering since 1997. Develops and manages training, represents practitioners for the institutions or local communities. The FFME is responsible for informing the public, developing rules of practice, competition rules and registering events on the official national calendar.	https://www.esf.net/nos-offres-classiques/hors-piste
Annual Events	Organizes popular gatherings for initiation or improvement, in climbing, skialpinism, dry-tooling and ice climbing.		https://www.esf.net/evenements
Magazine	La Montagne & Alpinisme / Montagne Infos	http://grandevoix.fr/	Traces Webzine http://traces.esf.net/
		http://www.ffme.fr/uploads/federation/documents/2016-chiffres-cles.pdf	

6. References & data – Ski Organizations

Federations, associations & clubs	France Montagnes	Sports Gouv.fr	Fédération Française de Ski FFS
URL	https://www.france-montagnes.com/	http://www.sports.gouv.fr/presse/article/Lancement-de-la-campagne-nationale-de-prevention-des-accidents-en-montagne-Pour-que-la-montagne-reste-un-plaisir	http://www.ffs.fr/
Contact	info@france-montagnes.com	-	Président commission ski touring DEJAX CHRISTIAN
Phone	Association Ski France Montagnes Alpespace, 24, voie Saint Exupéry 73800 FRANCIN		http://www.ffs.fr/contact
Members			1000 clubs affiliated to the FFS in France (155 clubs for ski touring) 130,000 members: 48,000 licenses "competitor" 82,000 licenses "leisure"
Target	France Montagnes is an association that brings together the major players in the mountain tourism industry of France. The objective of France Montagnes is to promote the mountains of France on a national and international level.		Est. 1924, FFS is dedicated to the practice and the development of skiing in France, it gathers all the ski clubs of France and organizes competitions on its territory. FFS promotes the ski in all its form, which include ski touring.
Characteristics		http://www.preventionhiver.sports.gouv.fr/IMG/pdf/labaseskiderandolow.pdf	-
Annual Events	Skiing into Spring http://www.skiingintospring.com/		
Magazine	https://www.france-montagnes.com/webzine		
TO Affiliate	https://www.ski-express.com/		

6. References & data – Ski Festivals and Events

Festivals	Big Up & Down	European Outdoor Film Tour	Nuit de la Glisse
URL	http://communitytouringclub.com/big-up-down-concept/	https://www.eoft.eu/fr/	https://nuitdelaglisser.com/
Concept	<p>The event that brings together all the practices and all the practitioners of the universe "ski touring".</p> <p>The Big uP & Down is a unifying event, open to all hikers (beginners or experts) and brings together all new ways of practicing.</p> <p>There will be something for all tastes and all ages, so come take part in one of the events, animations or supervised experiences of the Big uP & Down 2018.</p>	<p>One evening - Seven films - The Best outdoor and adventure films of the year The most renowned film event on the European outdoor calendar: The European Outdoor Film Tour is heading to more than 300 venues in 14 countries showing inspirational protagonists with an heartfelt passion for adventure and the great outdoors. Throughout the programmes of the last 15 years, we've followed one principle: We need no actors, no blue screen, no second takes. Only true adventure. THIS IS REAL.</p> <p>No script, no actors, no special effects</p>	<p>Just one year after the release of Don't Crack Under Pressure - Season 2, Thierry Donard brings us the final part of his trilogy. The culmination of a saga in which friendship and sharing reach their highest heights. La Nuit de la Glisse is entering a new era, exploring new disciplines, documenting the passing on of values between two generations of riders, the ultimate homage to athletes that have left their mark on their sports through their achievements. Goodbyes for some, picking up the relay for others.</p>
Where	Les Arcs (French Alps)	The European Outdoor Film Tour is heading to more than 300 venues in 14 countries	France, Switzerland, Italia, Germany, UK, Sweden, Austria
When	February	December	November
Interest Area	Only Ski Touring	The most renowned film event on the European outdoor calendar, showing inspirational protagonists with an heartfelt passion for adventure and the great outdoors.	The world of boardsports

6. References & data – Ski Festivals and Events

Festivals	Montagnes en scène	International Freeride Festival Tarbes
URL	http://www.montagne-en-scene.com/	http://www.festival-freeride.com/
Concept	<p>Mountains on Stage - After an opening show in Paris, Mountains on Stage will take the road across Europe. The aim of the festival is to showcase adventures, both human and challenging, personal and collective, reachable and extreme, right next to you and on the other side of the world.</p> <p>to experience the happiness of being in the mountains, through exceptional films!</p>	<p>With an ever-growing creativity from filmmakers around the globe and the evident lack of exposure given in Europe, ski/snowboard films deserved a fitting cultural and artistic event of their own. Over these 13 years, our festival has progressively filled this space, encouraging riders, filmmakers and spectators to follow their dreams. The festival has become an essential event in the Pyrenean Winter sports scene, thanks to the quality and diversity of the films presented each year, with a rich variety of footage and stories from all over the world.</p>
Where	40 cities in Europe: France, UK, Belgium, Switzerland, Luxembourg	Tarbes (Southwestern France)
When	March	November
Interest Area	Mountains on Stage	The International Free Ride Film Festival has been built around a strong goal: to give recognition to the artistic aspects of snowboard/ski films and to make them available for a wider audience.