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Knowledge Transfer Project

Ski Touring From Spain

2017-2018

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1. Executive Summary

In the last three months of 2017 and first three months of 2018, Innovation Norway in Spain conducted a research project regarding ski touring in Spain.

The goal of the project was to acquire more knowledge about ski touring and get to know better this segment in Spain. The task was divided into two phases:

1. Research in websites of tour operators, magazines, forums, organizations, clubs and events websites. In addition to the research in websites in many cases we completed this information by phone.
2. Telephone interviews with tour operators which were completed by a detailed questionnaire done by questback.

When speaking about ski touring trips in Spain most of the tourists travel in groups of friends. When they start looking for inspiration for this kind of trips, one of the most important factors is to have a guarantee of the quality of the ski experience.

Even though the demand for ski touring is increasing over the last years, this is still a niche ski product and Norway is not in the pole position for Spanish to go skiing. The main reason is the perception of Norway having high prices and difficult connections. If there is no direct flight and after arriving to Norway they need to drive or continue with long land transportation, they would select other more far away destinations which have a higher awareness and perhaps not so much longer travel in total.

2. Introduction & Methodology

This knowledge transfer project was conducted by Innovation Norway's office in Madrid (Spain).

The project's target group was Spanish people with a "special interest" in ski touring. The reason why Spain was selected is because IN office in Madrid has been experiencing an increasing demand of information by users and specialized press.

The project was conducted in two phases:

Phase 1 was done through research on the internet and based on existing knowledge.

The following sections were mapped out in phase 1:

- Tour operators who offer skiing trips
- Guides/guiding companies/activity companies offering ski touring
- The most important websites/forums covering ski touring
- Media: Ski/outdoor magazines covering ski touring
- Special interest organizations/associations for people interested in ski touring

We did a selection of the most relevant contacts and companies for the project.

Phase 2 consisted of a questionnaire done to a selection of tour operators and travel agencies working with this segment and conducting telephone interviews. We spoke to the four most relevant tour operators, all of them currently sell Norway as a ski tourism destination.

The interviews were conducted between February and March of 2018.

As a result of both phases, we got a better understanding and knowledge about Spanish ski touring market. This gives interesting information about target audience, success factors and concerns and needs about products and suppliers in Norway. We also got an overview of the competition and what makes skiers to choose a country or region as destination.

3. Research on the Internet: Phase 1

The first phase of the research was done by Innovation Norway based on information taken from internet. We found very interesting information and we answered some questions within the next topics:

- Tour operators who offer skiing trips
- Guides/guiding companies/activity companies offering ski touring
- The most important websites/forums covering ski touring
- Media: newspapers and magazines. Ski/outdoor magazines covering ski touring
- Special interest organizations/associations for people interested in ski and ski touring

3.01 Tour Operators:

We identified six Spanish tour operators. We looked at their target audience, what types of trips each operator offers, if they offer trips to Norway and if they can be interested for Norwegian suppliers.

3.02 Websites/Forums:

We identified three websites with focus on skiing. We looked at their target audience, content and advertising opportunities.

3.03 Magazines:

We identified six ski magazines. We looked at their target audiences, distribution, content, frequency and advertising costs.

3.04 Ski Clubs:

We identified four ski clubs/associations and looked specifically at membership numbers, target audience, if they are organizing annual events, and if they have a membership magazine.

4. In-Depth Telephone Interview: Phase 2

In the first phase we identified six different Spanish ski tour operators, both selling Norway and not selling Norway. In-depth interviews were conducted with four of them (one is a guide company). In the second phase we focused in having interviews with the ones selling Norway because they can give us a more accurate feedback about weaknesses and strenghts of Norway as a ski touring destination. We also included in the interviews Guia Llongueras, a guide who travels with groups to practice ski touring and knows Norway quite well.

4.01 Offer of Trips to Norway

All of them are offering trips to Norway, some to more than one place in the country. They are very satisfied because Norway is perceived as a safe destination among their clients and there are good services for the practice of ski touring and also for other activities in the snow. Although Norway is an expensive destination for Spanish, all of them agree on the development of this market with the increase of bookings over the last years and potential for future development. Some of them would like to include other regions of Norway in the future.

4.02 Presence in Other Markets

They are all based in Spain but also sell in other countries. Especially Latin America.

4.03 Demand

All interviewed tour operators described the ski tourism industry as “increase” or “large increase” over the past few years. Every year they have new clients with different desires to practice this sport. For example, one of them had 5-8 ski touring trips three years ago and they had had around 30 this season.

Norway has a lot of potential areas for good quality ski touring. That is the reason why tour operators think the number of ski touring skiers in Norway will continue increasing and they see a need for accommodation for groups. Even today they have difficulties to find accommodation for groups.

4.04 Booking Behavior and Length of Stay

The average length of the typical trip is between 8 and 12 days (including travel between Spain and Norway). Reservations are done quite close to the date of the departure due to Spanish travel habits. Most of the reservations are done between three of one month in advance.

All tour operators also agreed that the largest part of their business comes from group bookings made of friends, colleagues or teams/clubs traveling together or from individual bookings. One of the tour operators pointed out the difficulty to find big vans when reserving for groups of friends.

4.05 Accommodations

Tour operators reported that their clients have different needs in regards to accommodation. Most of the operators agreed that most of their clients stay in hotel or guest houses. They also like cabins as an option.

One operator pointed out due to the increase in the general demand, accommodation is always the most difficult part of the reservation due to reservation conditions, like advance booking and payment. This is a big problem for them because they produce the program and then try to make the groups out of individual reservations. In some cases they do not have the final group until close to the arrival date and sometimes they have cancellation costs if they do not manage to sell the complete allotments.

Regarding the possibility of sleeping in the boat one of the experts found it a good alternative as long as the quality of the boat and sleeping conditions was extremely good.

4.06 Local Food

All the operators agreed that local food in a destination is quite important to their clients and they are ready to pay for it. However some specifically stressed the need for a more varied food offer.

4.07 Sustainability

Surprisingly, all the tour operators interviewed reported that sustainability is not a priority for their clients and working with companies marked as sustainable or eco certified does not have an added value for them.

Although the tour operators know there is an overall awareness of the need to be sustainable, they all agreed that it still does not drive decision-making.

4.08 Willingness to Pay (WTP)

When it comes to what clients are willing to pay extra for, answers were quite consistent across all tour operators.

Accommodation

Willingness to pay for medium quality accommodations was universal across all tour operators.

100% Medium WTP

Hire Equipment

Eventhough some clients bring their own equipment, the idea of hiring equipment is taken into account.

25% High WTP

50% Medium WTP

Local Food

Importance of local food was very consistent across the board, but some don't pay attention to it.

50% High WTP

25% Low WTP

Guiding

Guiding is essential for all of them but due to the fact that some of the operators bring their

own guides we got this answer:

50% Medium WTP

50% Low WTP

Luggage Transport Between Destinations

It is not a priority since most of the skiers like to stay in one place.

25% Medium WTP

25% Low WTP

Planning/Organizing Ski Trips & Adventures

Majority of the operators agree on the WTP for ski trips and adventures among their clients.

75% Medium WTP

25% Low WTP

Sustainability / Sustainable Solutions

Some operator rated it a medium WTP, but some others answered “don’t know”, which means this is not a priority criteria for many of the skiers.

50% Medium WTP

4.09 Willingness to Pay Extra

The operators didn’t report any WTP Extra for. One of them answered that clients don’t like to pay for local guides because they think it’s too expensive.

4.10 Equipment

Operators reported that most of their clients prefer to bring their own equipment while only 25% rent it on site. One operator said that some clients think about renting equipment because it is more convenient than bringing it in the flight.

4.11 Frequency of Travel

Frequency of travel for this target group is not very high. More interested clients travel abroad once per year. Sometimes it is less frequent than that, but they have also clients that travel multiple times per year. There is a variety of answers.

4.12 Importance of Guides

Guiding is very important for the clients. All of them prefer going with guides and most of the operators they bring their own guides. It’s relevant to note that the most wanted ski touring holiday is base camp with guided day trips or ski and sail with guide included too. Therefore, for the Spanish market, guides are very important when making a reservation for ski touring trip.

4.13 Ski Tourist Bucket List

All the snow countries were mentioned during the survey, specially Scandinavian countries, Italy (Dolomites) or the Alps. Less common places, such as Japan, Russia or Kyrguistan were also mentioned.

4.14 Special Needs

Good quality hotels and other accommodations are a must for the clients of the interviewed operators. As they are paying a high price they expect to receive a high quality of the service. The location is, of course, very important. The accommodation should be close to the place where they will be practicing ski touring.

It's also important to cover the needs of groups, in terms of accommodation and transportation. That's why operators want big vans to move around the country.

It was also mentioned that they would like to have the possibility of booking cabins without cancellation fees, because sometimes this can cause extra costs for the operator when they do not manage to have the group confirmed in time.

4.15 Success Factors for Ski Tourism Destinations

Most operators mentioned that it is needed to offer a variety of different types of skiing, like cross country or alpine in addition to ski touring. They don't want to sell only ski touring trips, they would like to sell new experiences to their clients with trekking, ski, snow activities or any adventure trip abroad related with the nature and sports.

To sum up, they want to improve the offer, being able to adapt to each customer needs and that their clients can find easily what they look for.

4.16 Challenges for Norway as a Ski Tourism Destination

All operators interviewed agreed that Norway is an expensive destination and it's not affordable for everybody, even though their clients are medium-high class.

Despite this, operators agreed on the good quality of the snow and the long season, but they need better connections from Spain to Northern Norway (direct flights) or more frequencies.

4.17 Marketing Channels

All of the operators we spoke to are using the Internet, trade fairs, newspaper and magazines, and social media to market themselves.

4.18 Influential Publications/Bloggers/Social Media Influencers

Influential magazines mentioned included Oxígeno and Desnivel.

5. Conclusions and Recommendations

Skiing is a quite popular sport in Spain, where there are more than 2 million skiers. However, with so many options to ski in Spain, a relatively small amount of ski enthusiasts decide to travel abroad in order to practice ski. The motivation for traveling abroad can be the longer season, the quality of the snow or the complementary offer around ski (after ski, tourism attractions, special accommodations, etc.). Norway has a longer season than Spain and high snow quality but it is not perceived as a quality ski country overall. Mainly because when people think about ski the first association is alpine ski.

Most of the ski lovers in Spain practice all kind of snow sports, from snowshoe to ski touring. According to the research done, Spanish people are demanding more and more ski touring trips. Over the last years, there has been an amazing increase on the number of touring skiers in Spain because people are getting more experienced and looking for new more challenging ski experiences.

When you look at the reservation pattern, we can see that the trend in Spain is to book later than from other European countries. For instance, according to a Google research, we can see that in Spain people start doing their summer reservations in April. This should influence the period in which to do marketing efforts to promote this kind of tourism product.

For Spanish, Norway is an expensive destination, not only to practice ski or ski touring, but also for tourism. The average profile of a Spanish tourist to Norway is people between 30 and 55 years old, medium to medium - high class. Many of the people in this age range do not speak English and they prefer to book their trips in a travel agency where they receive all the support needed. The target for people who practice ski touring abroad is slightly different to the general tourist to Norway. The age range and social class is similar but touring skiers have a very sporty and adventure profile and a high interest for nature and nature based activities. They are also normally more experienced travelers and they would not buy their trip in a regular travel agency but rather in a specialized agency. They would also be active users of online media to get information previous to the reservation.

Spanish see Norway as a safe and attractive destination with a unique culture. Of course, Norway is known among Spanish people as a ski destination thanks to the Winter Olympic Games in Lillehammer.

The long ski season is a good reason for Spanish to choose Norway as a ski destination but also the good quality of the snow and the possibility of practicing this sport surrounded by wonderful nature and with the view of the sea so close to the snow.

For ski touring we see two different target groups in Spain:

- a) Young travelers. From 25-40 years old. Experienced skiers and travelers who would travel mainly on their own trying to find the best deals on internet. Their motivation is adventure and challenging ski.
- b) Mature skiers. From 40-60 years old. Experienced and frequent skiers, with a high economic level who look for the adventure but would also like to sleep in a good place and eat good food. The main motivation for them would be the unspoiled nature, the arctic and exotic aspect.

6. References & Data – Tour Operators

Name of Company	Muntania	Naturtrek	X-Plore	Mundo Expedición	Trekking y aventura	Skiarías
URL	www.muntania.com/	www.naturtrek.com	www.x-plore.es	www.mundoexpedicion.es	www.trekkingyaventura.com	www.skiarias.com
Phone	629 37 98 94	948 290 353	606 53 95 92	91 298 16 95	91 522 86 81	91 598 97 80
Mass or Niche	Niche	Niche	Niche	Niche	Niche	Niche
Description	Worldwide ski vacations	Trekking and adventure trips	Adventure and expeditions	Vacation for singles	Trekking and adventure	Ski
Season	All	All	All	All	All	All
Target Market	Groups, private, made to measure	Groups, single	Groups, single	Friends, families, groups, solo travelers	Groups	Groups, individuals.
Level of Experience	All	All	All	All	All	All
Themed Tours	All forms of skiing	Trekking, cycling, ski	Trekking, adventure, ski	Adventure trips	Trekking, adventure, bike experience tour, ski	Ski mountain, snowboard
Destinations	Europe	USA, Europe, South America, Africa, Asia	Africa, Asia, Europe, America	Africa, Asia, Europe, America	Antarctica, Africa, America, Asia, Europe, Oceania	America, Canada, Europe
Standard or Customized	Set departures and customized	Set departures	Set departures	Customized	Set departures	Set departures and customized
Custom	Everything custom	Fixed departure packages	Fixed departure packages	Everything custom	Fixed departure packages	Everything custom
Packaging	Fully inclusive tours	Fully inclusive tours	Fully inclusive tours	Fully inclusive tours	Fully inclusive tours	Fully inclusive tours
Prices	Reasonable	Reasonable	Reasonable	Not listed	Reasonable	Not listed
Additional Activities	No	No	No	Not listed	Yes	N/A
Norway?	Yes	Yes	Yes	No	Yes	No
Sustainability Focus	No	No	No	No	No	No
Safety Focus? (Avalanche)	No	No	No	No	No	No
Online Bookings	Yes	Requests only	Yes	No	No	Yes
Brochures	Unknown	Unknown	Unknown	Unknown	Unknown	No
Potential for Norway	Yes	Yes	Yes	Yes	Yes	Yes
Comments						

6. References & Data – Ski Websites & Forums

Skiing Website / Forum	Esquí de travesía	Lugares de nieve	Nevasport
URL	www.esquidetravesia.net	www.lugaresdenieve.com/	www.nevasport.com/
Phone	N/A	N/A	N/A
Target	Ski and snowboarding enthusiasts	Ski lovers who want to keep inform about ski	Ski lovers who want to keep inform about ski
Interest Area	Ski lovers	News, tips, travel, forum	News, tips, travel, forum
Selling Tours	No	Yes	Yes
Themed Content	Ski information, routes, photos, maps	Resort reports, snowfall data, snow sports news	Resort reports, snowfall data, snow sports news
TO Aligned	No	Yes	No
Key Personalities			
Social Media Platforms	Yes	9k Tw, 127k TB	13,5K TW, 86K FB
Potential for Norway	Some	Yes	Yes
Comments			

6. References & Data – Ski Magazines

Magazine	Oxígeno	Sport Life	Campo Base	Solonieve	Aire Libre	Desnivel
Phone	91 347 01 59	913 47 01 00	917 585 144	93 431 55 33	915 26 80 80	91 360 22 69
Tourism Focus	No	No	No	Yes	Yes	No
Target	70% Male - 30 Female. Age 25-35 is 46,3%		66 % Male - Female 34%. Age 20-45 about 50 %	81 % Male - 19 % Female. Age 45-54 is 25%	68 % Male - 32% Female	77% Male - 23% Female. Age 25-34 is 35%
Distribution	Spain	Spain	Spain	Spain	Spain	Spain
Publish Frequency	Monthly	Monthly	Monthly	Winter time (Nov, Dec, Jan)	Monthly	Monthly
Lifetime	2008	1999	2004	1995	1993	1981
Website?	Yes	Yes	Yes	Yes	Yes	Yes
URL	www.revistaoxigeno.es/	www.sportlife.es/	www.eldiario.es/campobase/	https://solonieve.es/	http://airelibre.com/	http://www.desnivel.com/
Advertising Cost	4,150 € - 217 x 290	7,250 € - 217 x 290	4,500 per page	5,318 - 230x300	5,100 per page	2,900 per page
Circulation	16,328	60,686	15,000	35,000	50,000	20,000
Potential for Norway	Yes	Yes	Yes	Yes	Yes	Yes
Comments						They have a special magazine once a year of ski.

6. References & Data – Special Interest & Ski Clubs

Special Interest / Ski Club	Federación Española de Deportes de Montaña y Escalada	Guía Llongueras	Federació d'Entitas Excursionistes de Catalunya	Asociación Española de Guías de Montaña
URL	http://www.fedme.es/	http://www.guialongueras.com/	www.feec.cat/	http://www.aegm.org/
Phone	934 26 42 67	+34 676 51 06 55	934 120 777	974 355 578
Members	108,000	N/A	39,888	950
Target	Mountain sports and climbing	Mountain courses	Trekking	Only mountain guides could join the association
Characateristics	Private entity to promote mountains sports and climbing	They prepare trips and give formation to guides	It's an asociation only in Cataluña	It's an asociation registered in the Ministry of Work
Annual Events	Yes	Yes	Yes	Yes, but only for asociated
Magazine?	Yes	N/A	Yes	Yes
Circulation and Frequency	N/A		N/A	N/A
TO Affiliate	Own trips	Own trips	Own trips	Own trips