

# MAPPING SKI TRENDS.

WINTER 2017/18







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## Welcome to Club Med's fifth annual ski report

Since our last look at trends shaping the ski holiday market, Brexit has been regarded as the antennae of consumer confidence. The ongoing uncertainty of negotiations, however, did little to dent Club Med's Winter 2016/17 season, which saw a record 12% increase in the number of clients visiting ski resorts. As the overall market holds steady, 2017/18 is proving to be another stellar year for Club Med. Bookings are up 35% compared to 2016. In the current climate, this exceptionally positive sign demonstrates the core strength of the business model to stand strong against economic fluctuations.

Club Med's simplified ski package prompting ease and convenience is successfully attracting a wider audience of skiers and non-skiers. The value of its core offering is further augmented thanks to our investment in non-ski activities – such as wellbeing (including pools, spas and gyms) as well as gourmet dining – which guests enjoy included in their holiday, continually broadening the appeal of our resorts. One of the

most striking shifts is in the proportion of first-time visitors to the slopes, who now make up 47% of Club Med's customers.

Families account for 64% of our market and ABTA has highlighted the rising popularity of all-inclusive breaks, particularly among those with young families. In 2017, 35% of young families planned to take a holiday of this type.

As customers hedge against the potential currency fluctuations of a weak pound, paying upfront and in sterling for a holiday is a strong consideration. Indeed, ABTA's figures show that the overall market share of all-inclusive is up: from 18% in 2016 to 25% in 2017.

Drawing on this insight, Club Med created the **Club Med How Much App** which enables customers to more precisely see the savings they can make compared to chalet and bolt-on options. As everything is included (accommodation, flights, transfers, lift passes, ski lessons, full-board dining, unlimited drinks, entertainment and all non-ski activities) this is an increasingly appealing proposition for travellers. Additionally, with 41% of holidaymakers preferring a winter sports holiday to any other type, early bird bookings took hold in January as customers snapped up cheaper flights and greater choice. Bookings for February half-term are at their peak a full 13 months in advance.

When it comes to destinations, French ski domains continue to be firm favorites amongst British holidaymakers. Bookings at Club Med in Val d'Isère are up 62% compared to last year. In Avoriaz the rise is 47% and in Tignes 41%. Club Med's on-going strategy - to deliver one new

### TOP 3 SKIER NEEDS



Quality of the accommodation



Time of year



Snow conditions/snowfall (importance increases the more advanced the skier)

**"The importance of snow conditions increases the more advanced a skier you are. As does the altitude and the accessible terrain both on and off piste"**  
Jenny Jones

ski resort in the French Alps every year for the next five years - is satisfying current demand, and this month we open the 4 Trident flagship family resort: Grand Massif Samoëns Morillon. This superb ski-in/ski-out location has 250km of slopes, a children's snow garden, outdoor heated pool, and a menu created by a Michelin star chef. In December 2018, a new Club Med in Les Arcs, a luxurious 4 Trident resort with 5 Trident luxury Space, will open in the Paradiski ski area.

Our longer-haul destinations continue to offer adventurers something a little different and, in line with this, we have announced the opening of our first Canadian resort in 2020, at Le Massif, Charlevoix in Quebec. The setting and the facilities will combine Quebecois spirit with an outstanding all-inclusive format. More immediately, in December 2017 a second Club Med resort opens in Hokkaido, Japan at Tomamu. Uncrowded, pristine powder slopes, snow trekking, rafting, ice-skating and sushi, of course, promise to make Tomamu a uniquely memorable ski environment.

This year's ski report taps into different customer profiles to understand what drives their decision-making processes. We see the rise of the ski gourmand: 36% of visitors set as much importance on great local food as they do good snow conditions when choosing a resort. We discover the technology people use on the slopes and look ahead to see how it's about to get smarter. We also find out how travelers are spending the *après-ski* hours. The overriding message from ski customers is that they are seeking added value – our report delves into the areas that interest them most.



It is with great pleasure that I announce the launch of our annual Ski Report, now in its fifth consecutive year. In a resilient British economy, Club Med has seen exponential growth within the ski sector and a year-on-year growth of 35%. The increased popularity in premium all-inclusive ski holidays indicates Britons are seeing the ever growing value in our unique premium all-inclusive model, the most comprehensive package of the market, when considering a ski holiday. I am proud to say ski holidays now sit at the forefront of our business with a rich development plan including the launch of one new ski resort in the French Alps, every year for the next five years, as well as expanding our ski pioneer positioning with new ski destinations such as China, Japan and Canada. It is within this growth context that we investigate four emerging trends shaping the ever changing expectations of Britons and what they look for in premium ski holiday.

**Estelle Giraudeau, Managing Director, Club Med UK and Scandinavia**

**"In a resilient British economy, Club Med has seen exponential growth within the ski sector and a year-on-year growth of 35%."**



## Contributors



### JENNY JONES

Great Britain's first Olympic medallist on snow, snowboarder Jenny Jones gives her take on ski trends and getting the most from the slopes throughout the ski report.

Winning bronze in Snowboard Slopestyle at Sochi 2014 Winter Olympics, Jenny has been a trailblazer in British snowsports for over a decade. Her Olympic medal is undoubtedly her career highlight; Jenny is also a three-time X Games slopestyle gold medallist (one European title, two global) and former silver medallist.

She is looking forward to supporting the GB team in South Korea for the PyeongChang 2018 Winter Olympics.



### ADRIENNE LDN

Personal trainer and influencer, Adrienne LDN shares fitness plans to get beginner and advanced skiers mountain-ready.

A former professional dancer in London's West End, Adrienne's love of living an active life led her to become a personal trainer and, subsequently, launch her blog. She blogs to share, inspire and showcase ways to lead a happy and healthy lifestyle. Ahead of her Club Med ski holiday in December 2017, Adrienne is adding Pilates and back and lower body stretches to her training routine.

Find her on Instagram, YouTube and at [AdrienneLondon.com](http://AdrienneLondon.com).



### LEE BELL

Freelance technology, health and lifestyle journalist Lee Bell explores the latest ski gadgets – and the future of ski tech.

Lee is a regular contributor to Forbes, Wired UK and Metro. He covers the buzzing tech scene, reporting on the latest innovations in consumer tech, such as apps, wearables, artificial intelligence, the Internet of Things and telecoms. He also specialises in lifestyle and health and fitness content.

Turn to the technology chapter to get Lee's low down on the gadgets coming to the slopes.

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What thrills and delights skiers post piste? *Après-ski* activities reveal how resorts are broadening their appeal



# SKI GOURMAND.

An increasingly important factor for many booking holidays. We take a look at the regional delicacies and Michelin star meals available high in the slopes



**Refueling after a long day on the slopes is essential, so it's no surprise 68% of skiers eat more on a skiing holiday than on an average day at home. But since the calorie burn can be anything from 300 to 400 per active hour, there's leeway to indulge – and now is the time, as skiers become increasingly food focused.**

Previously an overlooked aspect of a holiday, 84% of winter sports fans say their week away is the ideal opportunity to try new foods. For 36%, the range of restaurants and bars in the local area is the most important factor when selecting a destination and for 31%, it's quality that matters most. Nearly a quarter – 23% – will dine at international, local and Asian restaurants while

for 14%, no ski trip is complete without a fine dining experience. Michelin starred restaurants now dot the Alps and Dolomites, like beacons of gastronomy.

Club Med has adopted this gourmet trend in a partnership with chef Edouard Loubet, holder of two Michelin stars and five Gault & Millau Toques. The Epicurious Gourmet Lounge at Val Thorens showcases Loubet's light, contemporary cuisine, which celebrates the regional produce of the Savoie landscape and is inspired by the cooking of his grandparents. A native of Val Thorens (and former member of the under-21 French skiing team), Loubet is now bringing his flair to the newly opened Gourmet Lounge at Club Med Grand Massif Samoëns Morillon.



**34%**

pick a ski domain based on the good selection of cafes they can stop at on the slopes



**92%**

will try local delicacies whilst on a ski holiday



**LAST SKI SEASON AT CLUB MED**

ACROSS ALL CLUB MED SKI RESORTS GUESTS ENJOYED A TOTAL OF



**12,000L**

of Champagne



**3.5 Tons**

of smoked Salmon (or around 1,500 salmon)



**26 Tons**

of Oysters (equivalent to 400,000)

## Food with the feelgood factor

**Of all the food trends, it's hearty, local cuisine that gets skiers' taste buds buzzing, with 92% eager to discover the delicacies of the area and 81% saying it enhances their holiday experience. Just 15% are reluctant to try anything new, while 18% of women choose gluten-free or dairy-free options.**

Along with an appetite for authenticity, 73% say eating sustainably sourced food in everyday life is important for them. For one in seven (14%) holidaymakers, supporting local, traditional and independent food producers is an important factor to the enjoyment of their holiday.

At Club Med Valmorel, head chef Cyril Delbecque says, 'We want to avoid waste, use local ingredients, and make sure our meat and fish is sustainable. It all makes a difference. With this interest in regional produce, we can develop menus according to the produce around us and highlight this on our menu, so guests become more knowledgeable about the food they are

enjoying. Incorporating home-grown local ingredients into our buffet and a la carte dishes is an integral part of our guests' enjoyment and they actively demand it.'

In Serre-Chevalier, chef Stéphane Dessarce agrees: 'We have seen many food fashions but for the majority of guests, it's traditional food they want. A seasonally changing menu allows guests to make new discoveries.' His favourite ingredient is a local cheese - Tomme de l'Izoard - and seasonal fruit and veg.

**“Of all the food trends, it's hearty, local cuisine that gets skiers' taste buds buzzing.”**



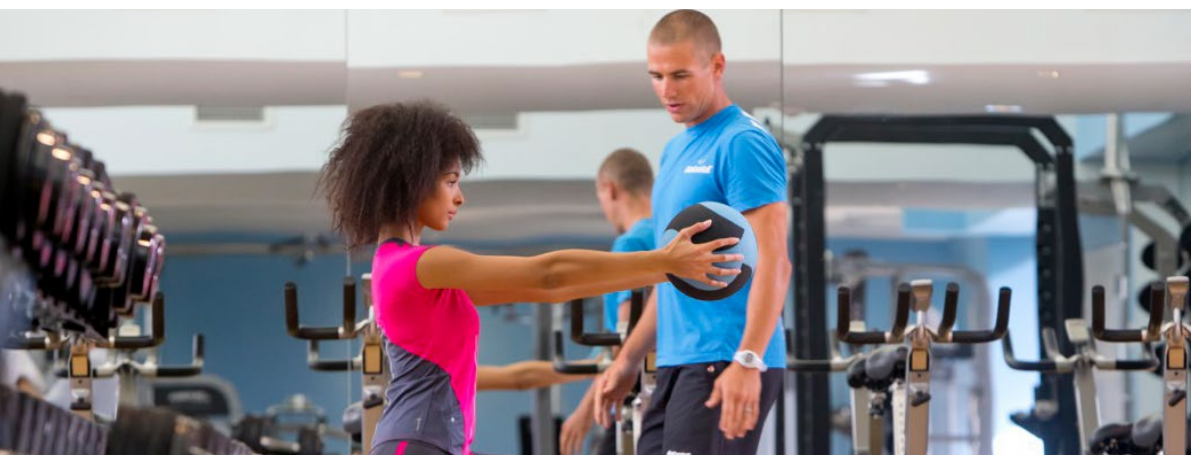
To read more on Club Med's chefs in conversation visit:

[www.clubmed.co.uk/ski-holidays/ski-hub/questions-and-answers-with-french-chefs](http://www.clubmed.co.uk/ski-holidays/ski-hub/questions-and-answers-with-french-chefs)



# FIT FOR PURPOSE?

You wouldn't arrive on a mountain top unprepared... would you? Our exercise stats reveal all

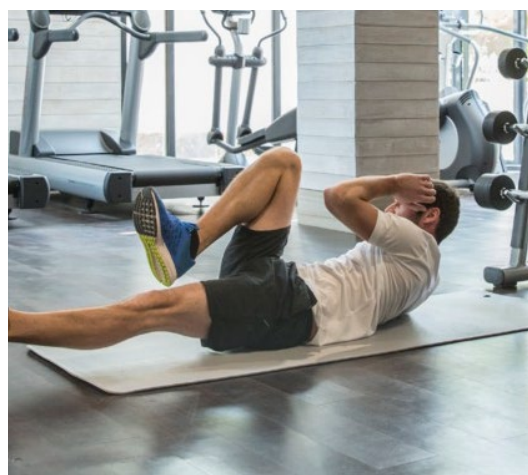


**Despite skiing being a sport, and one that takes place at high altitude, just 11% of skiers follow a dedicated ski fit routine before their holiday with over 55s (14% of whom have a ski fit routine) the most likely to prepare for the slopes. Nearly a third (30%) of first time skiers make no attempt to exercise with 18-24 year-olds the most likely to do nothing at all (33%).**

Among those who do exercise ahead of their trip, 48% maintain their regular routine and 17% increase the number of workout sessions. Women who do pre-trip exercise are more likely to increase their number of workouts than men (20% vs. 15%) though, overall, women are more likely to do no exercise to prepare (26% vs. 22% of men).

**“Skiing can burn up to 400 calories an hour and could easily wipe out a day's average food intake.**

Skiing can burn up to 400 calories an hour and could easily wipe out a day's average food intake. As a result, 45% of people admit they enjoy their holiday all the more because they feel the extra energy spent on exercise gives them the freedom to indulge, albeit moderately, in a little more food and drink. In fact 68% admit they eat more on their skiing holiday than they do on an average day at home.



**24%**

of people admit they do no physical preparation before their ski trip



**30%**

of first timers make no attempt to get in shape



**14%**

of 55+ skiers follow a dedicated ski fitness regime



**15%**

of those who ski three or more times a year do ski-specific exercises



## Ready to get ski fit?

Personal trainer and blogger **Adrienne LDN** shares fitness plans to get beginner and advanced skiers mountain-ready

### PRE-TRIP PREPARATION FOR BEGINNER SKIERS

**UP YOUR CARDIO.** Increase sessions in the weeks before your trip. Walking or jogging for 30 minutes, 3-4 times a week builds stamina.

**STRENGTHEN THAT CORE.** A good one for improving balance. Hold a forearm plank position for 30 to 40 seconds. Follow with ab crunches and/or Russian twists (to work the obliques). Up the intensity by lifting your legs off the ground, knees bent, ankles crossed.

**POWER UP THE LOWER BODY.** Doing squats and lunges is a must for all that legwork in skiing. Stand with legs hip width apart. Bend your knees, sending your hips backwards and return to upright, keeping your heels on the ground. Repeat for 30-40 seconds.

**STRETCH OUT.** Working on your flexibility is essential. Stand with feet wider than hip distance. Fold forward and reach towards the ground. Rotate and reach both hands to the left foot, hold for 20 seconds, then repeat to the right. Yoga and Pilates are also great ways to add flexibility and core strength to your pre-ski routine.

**RESISTANCE IS NOT FUTILE.** It will enhance upper body strength and give you more control. Introduce exercises using a resistance band or weights. Add lateral arm raises and single arm rows.

### PERFORMANCE ENHANCERS FOR INTERMEDIATE AND ADVANCED SKIERS

**HILL SPRINTS.** Using a treadmill, increase both the incline and the speed. Aim for 20 second sprint / 10 second rest. Repeat 8 times.

**TUCK JUMPS.** From a low squat, jump to raise your bent knees above your hips towards the chest. Try 30 seconds / 15 seconds rest. Repeat 4 times.

**ALTERNATING LUNGE JUMPS.** 30 seconds / 15 seconds rest. Repeat 4 times. Plyometric or jumping exercises such as this are great for building strength, endurance and agility.

**SIDE PLANK.** Propped up on your forearm, hold the body in a line from shoulders to toes for 45 seconds, each side. Repeat 3 times. Engaging the deep core muscles will improve your balance and performance.

**GLUTE BRIDGES.** To strengthen the lower back and enhance hip flexibility, lay on the floor, place your feet flat on the floor, knees bent. Lift your hips up off the ground, squeeze the glutes, and lower your hips down with control. Repeat for 60 seconds.



**Jenny Jones**  
on... fitness

**What do you do to get ski fit?**

'I do snowboard specific exercises in the gym which incorporate strength, agility, plyometrics and cardio. If you've only got one week to ski and snowboard you want to be as physically prepared as possible to not only enjoy it, but avoid injury. I also recommend stretching/yoga before and during your week away to help with recovery.'



Discover more fitness tips for every level  
<https://www.clubmed.co.uk/ski-holidays/ski-hub/ski-exercises>



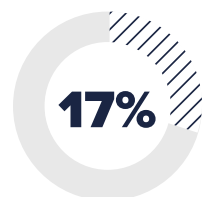
# SKI SMART.

How are we using technology on the slopes and what will snow hunters be using in the future?



There are exciting gadgets on the horizon for skiers and snowboarders, from goggles with anti-fog sensors and helmets with audio coaching, to fitness apps to help track progress. In this tech-savvy age, **74% of people ski with at least one piece of wearable tech. For 70%, the smartphone is their favourite companion on the slopes, with these helping 29% locate their friends, and 19% find their way to restaurants and bars. Half have downloaded a ski-related app to their smartphone: 71% use an app to check snow and weather conditions, 63% for maps and guidance, 53% to track their fitness goals, and 38% to keep abreast of safety information.**

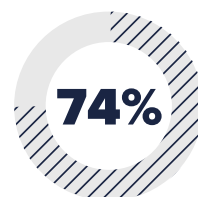
Beyond smartphones, nearly a fifth (18%) of those on the slopes choose to benefit from using goggles with interchangeable lenses. Other technologies seem to divide the ages: 74% of 16 to 24-year-olds use a GoPro, while among the 45+ age group 36% use a Fitbit. Gender also reveals tech preferences: 17% of women use electric hand warmers, while 14% of men use GPS-integrated clothing.



of women use electric handwarmers to keep them warm on the slopes



of men use a GoPro to film maneuvers compared to 40% of women



of 18 to 24-year-olds rank the GoPro as their favourite piece of kit

## TOP FIVE TECH ITEMS

- ① Smartphone
- ② GoPro
- ③ Fitbit
- ④ Smartwatch
- ⑤ Goggles with interchangeable lenses



## You wear it well

Intuitive, useful gadgets are what snow-hunters have been waiting for. **Lee Bell**, technology, health and lifestyle journalist, tracks the future of wearable tech

**Wearable tech in the form of small, connected gadgets that give us unique insights about ourselves is now part of everyday life. Whether it's a smartwatch, fitness tracker or clothing, technology you can wear to keep tabs on your fitness and activity levels are here to stay. It's no surprise that over a third of skiers now use a wearable device, such as a Fitbit. But - in ski terminology - we're still on the nursery slopes when it comes to exploring technology's full potential.**

It's no surprise that over a third of skiers now take a wearable device such as a Fitbit to the slopes with them. But whether these devices are providing any true benefits is questionable. Given that more than half of these skiers also admit that their fitness trackers make no difference to their skiing performance, the lack of any real gain is very likely.

There's a good chance, though, that many people are not exploring the full potential of their tech, and are wearing or hooking up to their devices on more of an experimental basis, because of curiosity.

My hunch is that consumers are confused. Wearable devices are heavily promoted as desirable lifestyle products for daily use, by the likes of tech giants Apple and Samsung, who push them as the 'next big thing'. But many of us don't really know how to make best use the data these wearables give us to a make tangible and positive difference. And with so many fitness gadgets on the market now, it can be hard to separate what is useful.

I'm optimistic that this will change and that the wearable market will become less saturated so that two or three big players will dominate but with fewer offerings, making it easier for people to choose the device that's

right for them. These devices will also become more intelligent, offering more personalised experiences. A fitness tracker won't just record your exercise data, but become an intuitive companion, rather like smartphones are extending their value, as an enabler for more parts of our lives.

The biggest development for wearables will be how smart features are integrated into everyday items: clothes, shoes, jewellery, glasses – or in the case of skiing – visors, gloves and base layers. This will allow us to monitor everything from our heart and breathing rate to the speed, direction and intensity of our activities. They'll feed us information on our brain activity and stress levels, using our physiological or behavioural characteristics to give us deeper and more helpful insights into our health and wellbeing.



### Jenny Jones on... tech

#### What tech do you find most useful on the slopes?

'Technical durable clothes to stay warm and dry are super important, and I wouldn't be without my avalanche transceiver for off piste riding. I also use protective eyewear with a prism lens so I can see in any conditions and protect my eyes at the same time.'

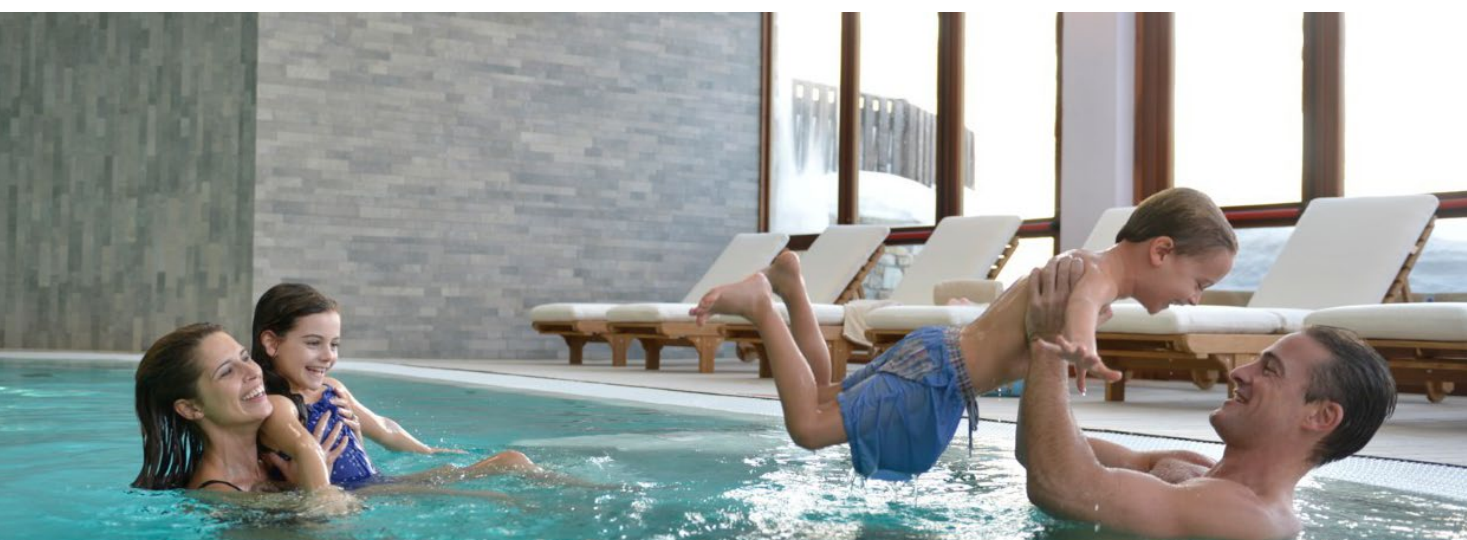


Discover more, download and get moving with our pick of the best ski apps  
<https://www.clubmed.co.uk/ski-holidays/ski-hub/ski-apps>



# TIME TO UNCLIP AND UNWIND.

What thrills and delights skiers post piste?  
According to our research, firing up the Kindle is  
one of the most popular après-ski activities



**Club Med research uncovered several surprises, not least that 41% of people enjoy nothing better than settling down to read a book after a day's skiing. It's the second most popular *après-ski* activity. Equally unexpected, we learned that 38% enjoy afternoon tea as their *après-ski* treat.**

The number one way to enjoy *après-ski* is at the bar – it's popular with 67% of holidaymakers and 74% of 18-24 year olds. However, as resorts widen their proposition so do the range of *après-ski* activities people choose: 37% can be found in the sauna or steam room, 30% head for the swimming pool, and 26% of women visit the spa for a treatment. Wellness is a major trend and is set to grow whether guests are skiers or not.

As the slopes fall into darkness, 67% agree the unique atmosphere that veils a resort is the

best part of those bewitching *après-ski* hours. Others cite the view (41%), the food (39%) and the music (22%). Incidentally, Val Thorens is the highest place to party in the Alps.

With everything included, indulging in *après-ski* is hassle-free at Club Med resorts, whether you're having an acrobatic lesson in Yabuli, China, sipping Sake cocktails at the Ice Village bar in Tomau-Hokkaido, Japan or sweating it out in the hammam in Valmorel.

**“In an unexpected finding, we learned 38% enjoy afternoon tea as their *après-ski* treat.”**



**30%**

of holidaymakers use  
the swimming pool in  
*après-ski* hours



**26%**

of women visit the spa  
for a treatment



## Who's for après-tea?

In France it's known as **le goûter**, or afternoon snack, and has its origins in the traditional tea served to French children: a baguette with butter and chunks of chocolate. The British call it afternoon tea but in any language, it's a popular aspect of the *après-ski* experience. Served at every Club Med ski resort and included in Club Med's all-inclusive holidays, no wonder 38% of guests rank it as their favourite *après-ski* activity.



**Discover more: Non-skiers welcome**

<https://www.clubmed.co.uk/ski-holidays/ski-hub/ski-holidays-for-non-skiers>



**Après-ski at your fingertips**

<https://www.clubmed.co.uk/ski-holidays/ski-hub/Apres-ski-activities#mountainsidemeals>



# IN SUMMARY.



**Confounding all expectations of a Brexit backlash, the ski market is proving resilient and adaptable. All-inclusive holidays are seeing a surge, as operators entice customers with fixed prices earlier in the season. Bookings at Club Med ski resorts are up by 35% compared to last year, with all-inclusive breaks protecting consumers from fluctuating exchange rates and hidden costs.**

This year's report found that gastronomy – whether upscale or modest – is flourishing as 92% of holidaymakers seek out regional produce in their resort and 35% choose a destination as much for the food as for the mountains. Two resorts – Val Thorens and Grand Massif Samoëns Morillon – feature menus created by two-star Michelin chef, Edouard Loubet.

The smartphone is the most popular piece of technology on the slopes with apps providing essential information. The GoPro is popular with younger skiers and interest in innovative tech such as GPS clothing and wireless helmets, is growing. Despite investing in technology, however, our fitness stats reveal that just 11% of people invest in a ski-specific fitness routine before going away, with 30% of first-time skiers making no effort to prepare for the slopes.

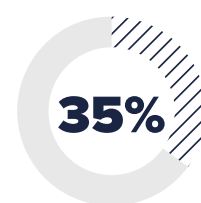
After hours, our research showed people are enjoying a broader range of *après-ski* activities than ever before, reflecting a new influx of consumer and the wider offer available at resorts: reading, afternoon tea, swimming and yoga are some of the top wind-down choices.

France retains its number one position as

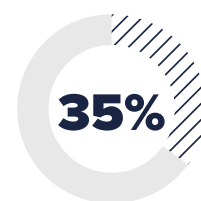
the favourite country for British skiers: 45% of all European ski holidays are taken there. Club Med's portfolio in France is expanding with Club Med Grand Massif Samoëns Morillon (December 2017), offering family-friendly skiing at all levels. In December 2018 Club Med in Les Arcs, a luxurious 4 Trident resort with 5 Trident Luxury Space, will open in the Paradiski ski area, complementing the existing adults-only resort at Arcs Extrême.

New far reaching destinations are also on the horizon: Club Med's second resort in Japan opens at Tomamu in December 2017. In China, adventurers have Yabuli (where the Chinese national skiing team trains) and Beihadu, a fairytale resort blessed with a long ski season. Club Med opens in Canada in 2020 at Le Massif, Charlevoix in Quebec – offering incredible waterfront views down to the St Lawrence River. All are innovative locations for those seeking the long-haul ski experience. And as we look forward to the Winter Olympics in Pyeongchang next February, we expect a boost for the winter sports holiday market as the British public cheers on Team GB.

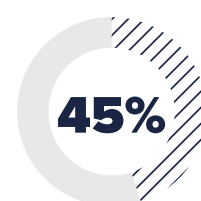
**“Bookings at Club Med ski resorts are up by 35% and new destinations are on the horizon.”**



year on year increase in bookings at Club Med ski resorts



of holidaymakers choose a destination as much for the food as for the mountains



of all European ski holidays are taken in France





Consumer research conducted by YouGov. Total sample size was 1000 adults. Fieldwork was undertaken between 5th and 11<sup>th</sup> October 2017. The survey was carried out online.

ABTA data collated from ABTA Travel Trends Report 2017.

Club Med data collated from 26<sup>th</sup> January and 26<sup>th</sup> August 2017

## Club Med

Club Med the luxury tailor made holiday provider, is known as the pioneer in all-inclusive holidays since opening in 1950 and now operates in 60 destinations globally including 23 ski resorts. The destinations in which Club Med offer ski resorts includes the French, Swiss and Italian Alps as well as Japan and China.

Club Med offers the most comprehensive ski package on the market, with many extras provided as standard. Believing in hassle free holidays, Club Med prides itself on ensuring ski holidays are stress free and 100% happy.

Club Med has been awarded “Brand of the Year” at the 2015 and 2017 World Branding Awards, the Silver award in Prima Baby’s “Best Family Holiday Brand for 2015”, 26 of their resorts have been awarded the “2015 TripAdvisor Travelers’ Choice Award” and 42 Club Med resorts have received “2015 TripAdvisor’s Certificate of Excellence”.

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Ski**