

Carving Out New Tracks: The Shifting Trends for 2024/25



Foreword

It's encouraging to see the travel landscape making a strong recovery from the past few years, however we recognise that factors such as rising costs still play a role in travellers' holiday planning. What remains clear, however, is that the appetite for ski holidays remains staunch amongst ski enthusiasts - with nine in 10 skiers already booked or intending to book a holiday this season - an increase of 105% compared to the same time last year. We have seen similar patterns at Club Med, whereby the number of ski holidays booked during the first week of our Winter 2025 sales opening in Q1 this year were up 89% year-on-year, with the average booking being made nine months in advance of travel.

Now more than ever, overall value for money and reliable snow conditions are vital when influencing skiers choice of destination and resort. We benefit from a number of high-altitude resorts which are snow-sure, including the newly renovated Serre Chevalier where 80% of the slopes are above 2,000 meters. Furthermore, as we approach the 2024/25 season we've seen a marked increase in



Nicolas Bresch
Managing Director, UK, Ireland &
Nordics at Club Med

travellers looking to book all-inclusive, with our research showing that 40% of skiers are opting for all-inclusive - the most popular accommodation type this season. Our presence as a leading all-inclusive operator, especially with lift passes, ESF group lessons and a first class [snow guarantee](#) included within our packages, has helped establish Club Med as a trusted option amongst our customers year on year. We pride ourselves on delivering a reliable and valuable service that ensures ease and value for money for our customers, taking the stress out of ski holidays and leaving them to focus on making memories, both on and off the slopes.

“During our Winter 2025 sales opening in Q1 this year, sales for our ski holidays were up 89% year-on-year, with the average booking being made nine months in advance of travel”

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Booking Behaviours

For the upcoming 2024/25 season, booking behaviours continue to be dominated by two main considerations: costs and conditions. Whilst neither are dampening Brits' appetite to return to the mountains this season, it's clear both are very much impacting their booking decisions – with many opting to book earlier to secure lower rates, or last minute to take advantage of late deals and good snow conditions.

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Nine in 10 (90%) of skiers have booked or intend to book a ski holiday this season, however, in light of the UK's current economic landscape, value for money is the most important factor for Brits when deciding what to book – with 42% of skiers citing it as a key consideration.

That said, Brits are willing to spend an average of £1,840 per person on a week long ski holiday (£381 more than in 2023), showing that despite it being an expensive hobby, many are willing to make costs work to enjoy their time in the snow during the limited season window. For avid skiers, over a third (36%) are prepared to take two or more trips this season.

For Club Med, the average customer spends £2,000 per person on a week long ski holiday in one of their premium all-inclusive resorts; whilst this may be slightly higher than the figure the average Brit is looking to spend,



their premium all-inclusive packages cover in-resort costs such as food & drink, kids clubs, week-long lift passes and 25 hours of group ski lessons with ESF, plus the [snow guarantee](#) – which can quickly mount up with other package types.

In fact, **88% of skiers say they would be more likely to book with an operator that includes lift passes within their overall package price.**

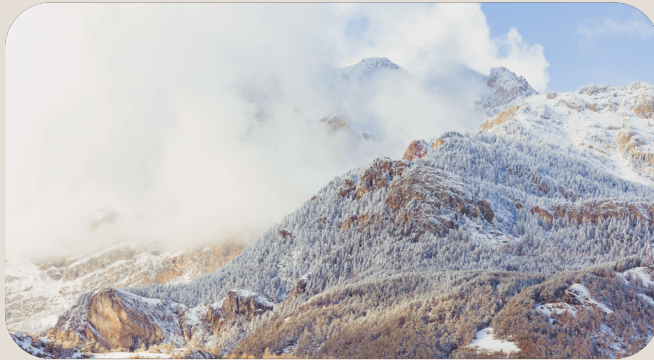
Booking well ahead of the season enables skiers to lock in early deal prices before they rise with demand.

Research found that **56%** of Brits have already booked their ski holiday by September – a **30%** increase compared to the same time last year. Of these, **37%** had booked up to a year in advance. **91%** of those who have already booked their holiday have done so to try to secure the best price, and this is more than double (**+117%**) the number who did so for the same reason last year.



Included	Club Med All-inclusive
25 hours of ESF lessons	✓
6 day lift pass	✓
Ski-in ski-out	✓
Kids club with qualified care and ski lessons	✓
Easy Arrival	✓
Snow Guarantee	✓
Gourmet local alpine food & drinks	✓
Midday and afternoon tea & snacks	✓
Evening entertainment & shows	✓





Club Med's ski holiday comparison tool allows customers to compare the price of a Club Med winter sports holiday with a holiday that they could organise themselves, taking into consideration accommodation and flights, as well as ski passes and lessons.

Club Med has seen this trend first hand with their own customers, whereby the number of ski holidays booked during the first week of the brand's Winter 2025 sales opening are +89% vs last year, with the average ski holiday bookings being made nine months in advance of travel.

Half (50%) of those polled believe that all-inclusive is the best value accommodation option for winter sports holidays, and **with 40% opting for all-inclusive, it is the most popular accommodation type for skiers this season.** All-inclusive resorts can be

a great option for those looking for value from their accommodation, from mitigating against potential inflation and fluctuating exchange rates, to locking in near-entire holiday costs at the time of booking, and therefore creating peace of mind when planning and managing budgeting.

Accommodation bookings:

40% All-inclusive hotel



21% Bed & Breakfast



18% Self-catering



14% Catered chalet



“As the beginning of the 2024/25 season approaches, we are seeing early demand from Brits looking to secure their upcoming ski holidays. Even more so than last year, we’re seeing skiers opting to book early and all-inclusive to lock in the cost of their holiday before they rise throughout the season.”

Nicolas Bresch, Managing Director, UK, Ireland & Nordics at Club Med commented,





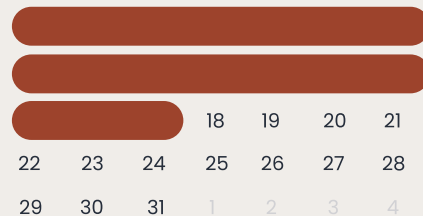
At the other end of the spectrum, half (50%) of those skiers yet to book this year's ski holiday intend to do so a month or less prior to departure. The largest factor in deciding to book last minute is the hope of finding a late deal, with 52% of those yet to book their 2024/25 ski holiday opting to wait for last minute deals. Second to late deals, one third (32%) have opted to delay booking their ski holiday to check snowfall, and plan to book based on the best conditions. **Two thirds of skiers (68%) are concerned about snowfall and conditions going into the 2024/25 season;** this is a 47% increase compared to those concerned ahead of last season.

With consumer confidence potentially bolstered by the strong snowfall at the beginning of last year's season, December is now the most popular month for skiers, with 38% of those polled planning their holiday in the festive month (versus 32% in 2023). Club Med have reported similar patterns with their own bookings, with December bookings currently up 23% year-on-year, and the festive weeks specifically seeing a 38% surge.

In order to put their minds at ease, skiers are increasingly looking for holiday providers to provide reassurance when it comes to a lack of snowfall. **88% would be more likely to book an operator with a [snow guarantee](#) (up 10% versus Club Med's 2023 poll).**

23%**December**

MON TUE WED THU FRI SAT SUN



Club Med has seen a 23% year-on-year increase in bookings for trips in December

Club Med provides a market leading [Snow Guarantee](#), which sees skiers moved to an alternative resort or offered a credit note for the full value of their stay, if more than 50% of the ski domain is closed for two or more consecutive days within a five-day period before departure.



Destinations







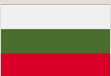

With almost 4,000 ski resorts in Europe alone, there has never been a shortage of options for skiers. For decades, choosing a destination would boil down to factors such as slope suitability, wider domain facilities and offerings within the alpine towns, the breadth of accommodation on offer, but now more than ever, the cost combined with looking at more snow-assured resorts are playing pivotal roles in where Brits are booking their winter sports holiday.

Getting the best value ski holiday has never been more important, and the choice of destination has a huge part to play here. Not only are people feeling the pinch with living costs in the UK, but couple this with significant cost increases in many resorts. While still largely cheaper than North America, lift passes in Europe for the 2023/24 season topped over €400/£300 for the first time for a week's stay - a significant cost to factor into the price of a holiday - with some resorts seeing bigger price increases than others. As such, 65% of those polled cited that the rising cost of a winter sports holiday would make them reconsider their choice of destination this season, up 25% compared to going into the 2023/24 season.

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It is therefore no surprise that the research revealed that value for money (42% agree) was the most important factor for Brits choosing a resort and destination. Interestingly, the study of 1,000 skiers revealed that the following were the best value resorts / domains:

- | | | |
|----|----------------------------|---|
| 9% | Zermatt (Switzerland) |  |
| 7% | Saint-Moritz (Switzerland) |  |
| 7% | Dolomites (Italy) |  |
| 7% | Grindelwald (Switzerland) |  |
| 7% | Borovets (Bulgaria) |  |
| 7% | Pragelato (Italy) |  |

Other factors which influence the overall destination being booked include seeking out less crowded resorts (29%), the variety of slopes on offer (28%) and the overall size of the ski area (23%). While Borovets, and Bulgaria as a whole, is generally known for being a more affordable ski area, others which feature in the list provide value in other ways such as offering an extensive ski network and / or a wide variety of trails both on and off-piste.



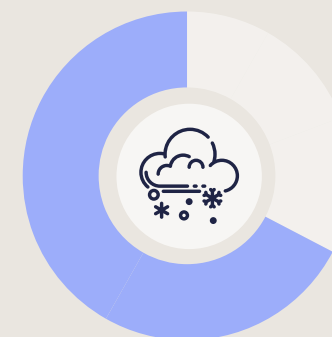
While perhaps surprising that three Swiss resorts feature so prominently within this list, given the country is usually considered a more costly destination, a reason which may be contributing towards this was last season's snowfall. While a hit and miss season for snow conditions across Europe, last winter was one of the best ever for Swiss glaciers in recent memory. Researchers at the Swiss Glacier Monitoring Network (Glamos) estimated that 31% more snow fell on average on the 1,400 glaciers dotted across the Swiss Alps than during the 2010-2020 reference period¹. While unpredictable snowfall levels can clearly be attributed to the ongoing effects of climate change, more snow-sure destinations are also becoming increasingly popular so people can get the most out of their trip and maximize time on the slopes.

Almost two thirds (65%) of those polled expressed their concern about snow fall and conditions going into the 2024/25 season - an 18% uplift compared to the same time last year. **Three in 10 (30%) Brits now also review recent snow conditions of a resort during the booking process - a 50% increase compared to the 2023/24 season.** When asked about recent seasons' snow conditions, 82% would be more likely

82% are now more likely to book a high altitude resort based on recent season snow conditions



to book a high altitude resort, but just over half (56%) are concerned this will come with a higher price tag.



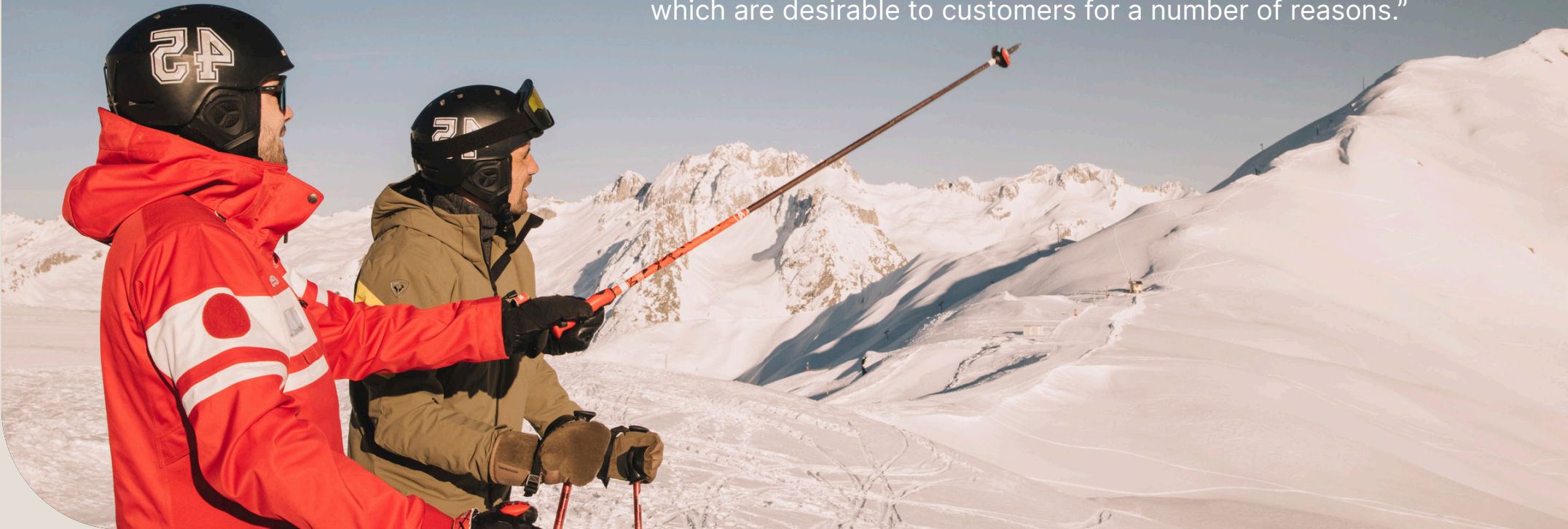
65%
Almost two thirds of those polled

Expressed their concern about snow fall and conditions going into the 2024/25 season - an 18% uplift compared to the same time last year.

¹ Swiss glaciers remain under threat despite huge winter snowfall, Swissinfo.ch (June 2024)

Bresch comments, ”

“We recognise that ski enthusiasts are now faced with a number of factors which influence their choice of ski destination and resort. From looking at overall value for money, while giving themselves the best possible option for good snow conditions, we understand it is a difficult (and highly competitive) process. Now more than ever, we know the importance of offering holiday packages with no hidden costs, all the while ensuring we are considering resorts in destinations which are desirable to customers for a number of reasons.”

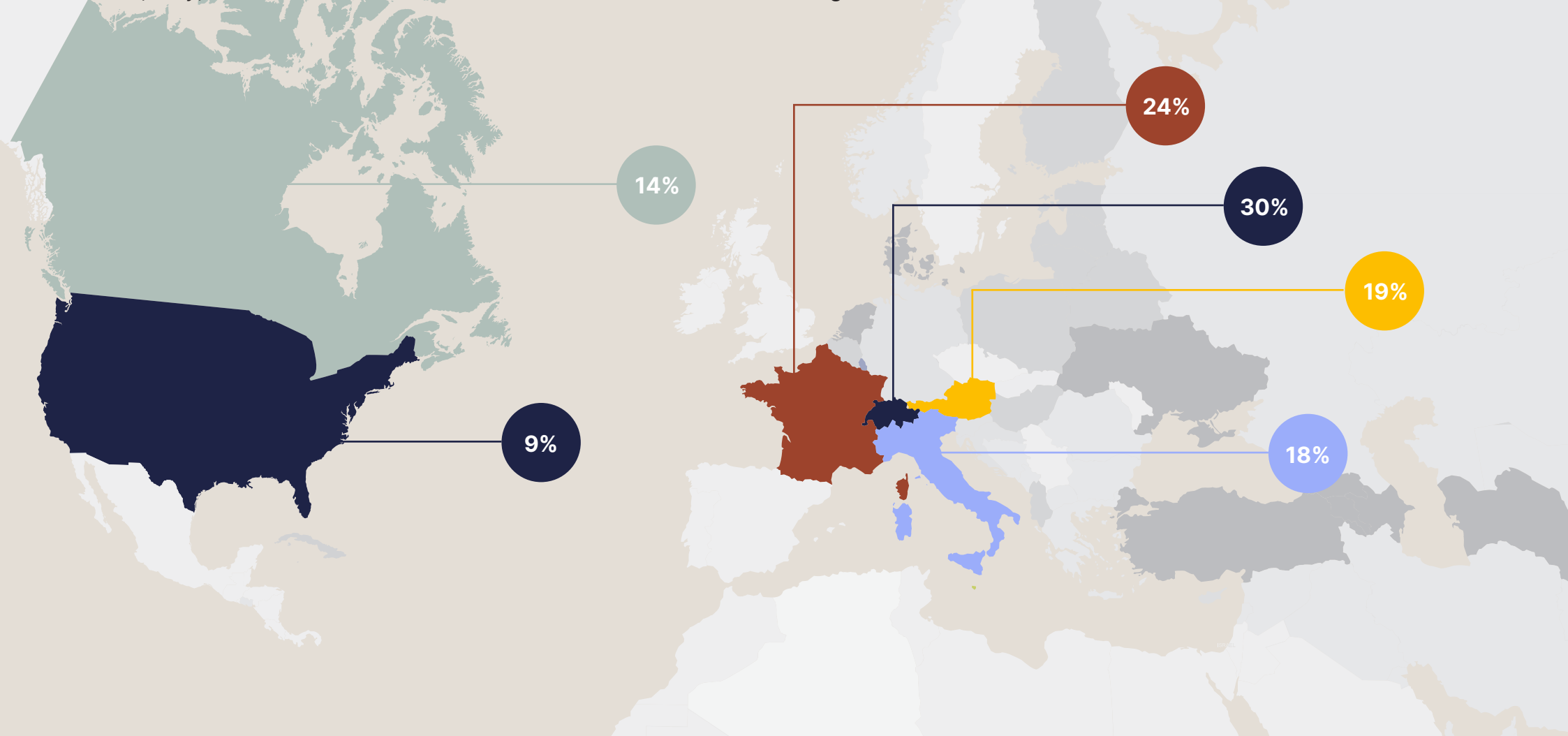


Club Med benefits from a number of high altitude resorts which are more snow-sure - including eight located over 1,800m and located in domains reaching 3,000m. Val Thorens Sensations is located a little over 2,300m - making it Club Med's highest altitude resort in Europe, with snow regularly in place from November to May. Equally, the resort in Tignes as well as benefiting from a high altitude in the upper town of Val Claret (at 2,300m), at the summit of the Tignes - Val d'Isère ski area lies the Grande Motte glacier at 3,656m whereby skiing and snowboarding can also be possible throughout the summer months.

The research also revealed that Switzerland comprises almost a third (30%) of bookings or intended bookings for the upcoming season, with the below the top six countries which Brits have booked or plan to book for winter 2024/25; Switzerland, France, Austria, Italy, Canada and USA.

For the top two destinations, these are both uplifts on last year's research findings, with a 30% increase for Switzerland and 20% increase for France. The increased demand for these countries is also reflected by Club Med sales data for the upcoming season, with an increase in bookings for the brand's

French resorts with Tignes, Val Thorens Sensation and Alpe d'Huez amongst the most popular and 26% year-on-year increase in bookings for Club Med's Swiss resort in Saint-Moritz.



Families and Activities

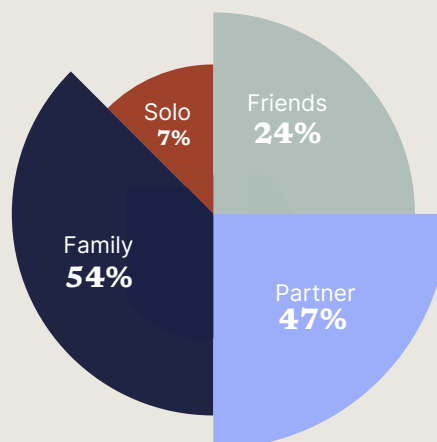


Holidays are traditionally a prime time for families to come together, and for active families, there is little better than a winter sports holiday. Whether it's carving down the slopes, exploring the charm of alpine towns and villages, or taking some well-deserved downtime to relax and enjoy the breathtaking mountain scenery, there is something for everyone.

Club Med has long established itself as a leader in family-friendly ski holidays, and this year family trips have proved to remain the key demographic for the brand - with over half (54%) of those polled choosing to enjoy a ski holiday with their families. 47%

are opting for a getaway with their partner, whilst 24% will be embarking on a trip with friends, and 7% are choosing to take on a solo adventure.

This season, people will be taking their ski holiday with their:



When it comes to planning a family holiday, a significant criteria is finding a resort that ensures reliable childcare provision and supervision. Club Med pioneered the kids club concept and has over 50+ years of experience in providing kids clubs which gives credence to the statistic that **64% of families would use a kids club if available**, with a 7% increase in 2024 of those opting to use the kids clubs since 2023, where last

Club Med has seen a 7% increase in use of kids clubs compared to last season

7%

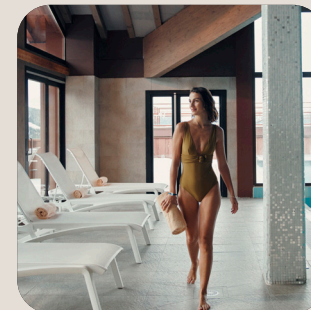
year saw a further 34% increase vs 2022. Tailored for each age group from toddlers to teens, Baby Club (4-23 months), Petit Club (2 - 3 years) and Mini Club (4-10 years) are carefully crafted spaces for children to have fun and learn at the same time, whilst being cared for by a dedicated team of professionals.

Club Med's new Chill and Teens Pass provides a fun space for groups of older aged children to mingle and play games suited to an older audience. Teens can engage in fun icebreaker activities, creative workshops, or enjoy exclusive events like magic evenings. The mobile Chill Spot provides a dedicated space for teens to hang out and unwind, while flagship activities, such as the Champion's Challenge, have been adapted for the mountains, becoming the Outdoor

Snow Challenge. Teens can also enjoy mountain-themed escape rooms and laser games, adding an element of adventure beyond skiing.

When it comes to what families value most in a resort's kids club, two in five parents (39%) prioritise English-speaking staff, while a third (33%) appreciate tailored activities for different age groups. Additionally, 32% of parents seek opportunities to participate in activities as a whole family, and another 32% value kids clubs that cater to all ages, up to 17 years. Over a quarter (27%) of parents said they would be comfortable leaving their children in a kid's club for up to four hours a day.

For 22% of families booking a winter sports holiday, the variety of slopes is the top priority, while 17% value group-friendly activities. The après-ski scene is a key consideration for 13%, and 19% of families see the quality of the kids club as the most important factor when choosing a child-friendly resort. This is where Club Med's Amazing Family program shines, offering a range of family-focused activities; where families can bond over giant outdoor wooden games, participate in cooking classes, and children can take to the stage for performances, ensuring every member of the family gets more than their fair share of fun.



Nicolas Bresch, Managing Director, UK, Ireland & Nordics at Club Med, stated,

“We take great pride in our family offerings, as a winter sports trip provides an ideal opportunity for families to come together and create lasting memories. Whether travelling with young children or older teenagers, we ensure that there is something for everyone. This commitment is one of the reasons we have been recognised as a Which? Recommended Provider for Family Holidays for two years running”



Since the start of the overall development of the Mini Club+ concept, families of Club Med have seen their children grow in confidence through the variety of activities provided in the kids clubs on ski holidays. This is backed up by evidence from Professor Ilona Boniwell, Expert in Positive Psychology and Positive Education and Consultant for Club Med.

Boniwell claims “Positive Education responds to one of parent’s major concerns, which is how to raise happy children? The added bonus is that this approach brings a range of activities that motivate, interest and make children feel valued by combining education and fun.”

Away from the hustle and bustle of family life, for those seeking relaxation and a moment of tranquillity following a busy day on the slopes, Club Med offers luxury spa facilities with extensive treatment menus that are the perfect remedy for tired muscles, with the newly renovated Serre Chevalier offering a premium experience with a brand-new spa for guests to enjoy.

When it comes to other activities, for thrill-seekers, Tignes is the ultimate playground, offering high-adrenaline activities like

paragliding through the skies or ice diving in the depths of Tignes Le Lac—an unforgettable adventure for the more daring family members.

At La Rosière, mountain guides will take you off the beaten path to find hidden gems of tree-lined routes up in the mountains and away from the more popular ski slopes. There is a clear demand for people wanting to explore more than just skiing and snowboarding on their holiday, with over half (56%) of those polled mentioning they have been on a winter sports holiday without taking to the slopes. It is here why Club Med continues to expand its offering of an array of alternative activities beyond the slopes, ensuring there’s something for everyone to enjoy.

When it comes to culinary experiences, Club Med resorts offer an abundance of alpine flavours and delights, found across all of their Mountain Resorts. From a la carte to specialist restaurants, Club Med prides itself on offering high quality food using as much locally sourced produce as possible. This also includes at the Exclusive Collection resort Club Med Val d’Isère where guests can indulge in an exquisite five-course tasting menus at the Les Millésimes restaurant, whilst taking in the awe-inspiring scene of the surrounding mountains. **Almost a third (29%) of participants cited that high quality food and drink was one of the most important factors when choosing a resort,** and Les Millésimes is truly the epitome of luxurious and indulgent dining to cater for this need.



Sustainability

The last few years have seen the travel industry deal with record-breaking warm winter weather currents, which have impacted snowfall and snow base depths, resulting in slope and - in some cases - resort closures. Combine uncertain conditions with airfare price rises, the ski industry is at a pivotal point. With one in eight ski areas at risk of losing all snow by the end of the century², it's crucial that the industry (amongst others) continues to meet both environmental and customer demands in order to preserve winter sports holidays for years to come.



45% Air pollution



37% Energy consumption



44% Plastic waste



29% Deforestation



36% Food waste

With an increased effort to travel more sustainably and visit resorts that are actively sustainable, it's perhaps no surprise that two thirds (67%) of those surveyed look at the eco credentials of providers before booking their holiday. This figure has increased from 60% in 2023, highlighting the ever growing significance of sustainability for customers and how this is a key factor when selecting a holiday. Of those surveyed, air pollution (45%) and plastic waste (44%) are perceived to have the most impact on the environment when it comes to international holidays, followed by energy consumption (37%), food waste (36%), and deforestation (29%). Club Med's [Happy To Care](#) programme continues to strive and commit to responsible tourism and tackles some of these areas, amongst others. **Across Club Med's mountain Resorts in Europe, 60% of the electricity consumed is produced by renewable energy sources and by the end of 2025, all Club Med resorts will be fully solar, wind and/or hydro powered. All**

of Club Med's Alpine Resorts are also Green Globe certified.³



Two thirds (67%) of those surveyed look at the eco credentials of providers before booking their holiday.

² 'How climate change could transform our holidays', The Telegraph (August 2024)

³ Green Globe is one of the most recognised and demanding international and independent sustainable tourism certification. It is awarded to tourism industry establishments committed to a comprehensive approach and to continuously improving the environmental and social management of their business



Club Med's newly renovated Serre Chevalier resort, launching for this coming Winter 2025 season was specifically designed and re-modelled to minimise its environmental footprint, from the resort's alpine design to its structural operations. The resort is the brand's first ski resort to generate its own electricity, with a goal of producing enough power to cover up to 50% of its energy requirements by 2030. Almost half (43%) of Brits believe that booking with a holiday provider which gives back to the local community is one of the most important factors when planning their

winter sports holiday. Serre Chevalier uses local distribution networks and hires local guides to teach both children and adults about environmental networks. Worldwide, almost 94% of the jobs created directly or indirectly by Club Med are filled by local hiring and 56% of the fresh produce used by Club Med Resorts are sourced from local farms or suppliers.

“Club Med’s newly renovated Serre Chevalier resort is the brand’s first ski resort to generate its own electricity, with a goal of producing enough power to cover up to 50% of its energy requirements by 2030.”



“Travel is at a turning point, with sustainability now a key priority for our guests. We take pride in listening to our customers and reflecting their values in everything we do—from promoting eco-conscious travel to building resorts with dedicated in-resort initiatives. By supporting local communities and prioritising responsible practices, we create authentic experiences that allow guests to enjoy their stay while making a positive impact.”

Nicolas Bresch, Managing Director, UK, Ireland & Nordics at Club Med commented.

When it comes to transport methods in getting to winter sports destinations, while flying still leads the way (79%), the rising cost in airfares coupled with increased efforts to travel more sustainably has resulted in holiday goers considering alternative routes. With airfares in Europe rising by as much as 10%⁴ and forecasted to continue rising by a further 1.4% in 2025⁵, **over three quarters of those surveyed (79%) would be open to using the reinstated Snow Train.** Brought back in 2023, the train heads to key destinations in the French Alps via a changeover in Lille, with Club Med offering guests the option to book without flights, giving them the flexibility to choose the Snow Train or an alternative mode of travel. Bourg Saint Maurice train station is centrally located for short onward transfers to Club Med's resorts in Les Arcs, Tignes, Val d'Isère and La Rosière, and from Moutiers, Val Thorens in the Three Valleys.

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⁴ Why are airfares rising - and should I book my summer holiday flight now?, The Independent (February 2024)

⁵ Travel costs to continue rising in 2025 as CWT predicts moderate increases, Business Travel News Europe (September 2024)

