

12

The Future of the Winter Sport Tourism Industry

Spotlight: Tina Maze places Slovenia in the limelight



Tina Maze

Slovenia's skiing has been put into the international spotlight by Tina Maze, the most successful female ski racer in Slovenian history. Multi-tasking Maze is one of the few winter athletes who competes - and regularly wins on the international level - in all five skiing disciplines: Slalom, Giant Slalom, Super G, Downhill and Combination.

In her own country, Maze is a superstar: five-time winner of best Slovenian athlete, a fabulous fashion model and a pop star with Slovenia's most watched YouTube music video. Born in 1983, Maze grew up in Crna na Koroskem in northern Slovenia, less than two hours drive from

the country's top ski resort, Kranjska Gora which hosts the men's World Cup Slalom events every March.

Tourists come to Kranjska Gora from all over Slovenia, Germany, Croatia, Italy and also Great Britain. According to Kranjska Gora Tourist Board Director, Mirjam Žerjav, out of a total of 177,398 overnight stays in the resort during the 2013/14 season, domestic visitors accounted for 81,429 and foreign visitors 95,969. Of the international visitors, the majority was from Croatia (21,117) followed by Italy (17,416), Britain (13,997) and Germany (3,634).

British ski operator Inghams has been bringing skiers to family-focused Kranjska Gora on and off over the past 20 years. Their numbers have ranged considerably from year to year, from a maximum of around 3,000 down to around 300 predicted for the 2014/15 season. This is in line with national ski visitation numbers which reached a peak in 2008/9 at 207,790 but were reduced to just 128,296 skiers in 2013/14 - reflecting the slow recovery in the European economy since the recession.

Compared to typical ski holidays in Switzerland and France, prices are low in Kranjska Gora. During the 2014/15 season, for example, a week's stay with Inghams in a four-star hotel in February cost around £579 per person (including flight, resort transfer, accommodation, breakfast and dinner) and was discounted to £429 by the end of January.

In the past two decades, there has been considerable investment in hotels, new apartments and sports facilities, says Žerjav: "All the lifts are practically new - the investment in the past 10 years was over 20 million EUR. And all hotels have been renovated, an investment of around 50 million EUR." Hotel beds have increased from 1,384 in 2006 to 1,905 in 2013 and apartment beds have risen from 1,384 in 2006 to 3,054 in 2013.

Set near the Italian and Austrian borders with the spectacular Julian Alps as a backdrop, the affordable ski resort with 30km of skiable slopes appeals particularly to novice and intermediate skiers. As the most forested country in mainland Europe, the scenery is also highly rated. With a good variety of ski trails and the challenging World Cup run at Podkoren, this is one of Slovenia's most popular ski resort for families, says Zuber Sameja, Inghams' product manager for Slovenia. Snow cannons, producing more than 500,000 m³ of artificial snow, supplement precipitation on 85 per cent of the ski terrain.

Factors which encourage skiers to try Kranjska Gora include family facilities, novelty, affordable skiing, good value après ski, the blend of Austrian and Italian cuisine in traditional inns, and the friendliness of local people. "Skiers want to try something else and also Kranjska Gora holds the World Slalom and Giant Slalom Cup every year," Zuber adds. The town of Kranjska Gora, set in the Zgornjesavska Valley is picturesque, attracting domestic and international visitors summer and winter due to its mountain and lakes appeal.

As well as the ski hill, winter amenities include a snow park, cross country trails, ice climbing, night skiing, sledding, snowshoeing, ski touring, and kids' activities. Hotels are equipped with triple and quad rooms, most with door-to-slope skiing. There are many family-friendly events throughout the winter, including in December a live nativity scene which is constructed in the Ice Kingdom. As well as the Vitranc Cup (part of the World Cup series), the Planica World Cup Finals, a ski jumping event, is held each March.

The national profile of Slovenia's ski industry received a boost when ski racer Tina Maze burst onto the World Cup scene around 10 years ago, winning in all five alpine disciplines, as well as nabbing two Olympic gold medals at Sochi. Awarded best female athlete of the year for 2005, 2010, 2011, 2013 and 2014, she is a Slovenian national heroine. "We've yet to see internationally but certainly she is a great ambassador for ski Slovenia and she is present at many U.K. events hosted by Spirit Slovenia," says Zuber. "Slovenia Tourism is working very hard and, as a frequent visitor, I have seen many changes that are positive - especially new German ownership of the main airport of Ljubljana, quite a few gateways from Croatian airports, too, so more possibility of improving numbers."

Sources: Interview with Zuber Sameja, January 2015

The future for the ski industry

The opening Spotlight focuses on Slovenia's emerging ski industry, and Eastern Europe is one of the few parts of the world where the ski industry is growing. Countries like Bulgaria, Russia and Poland, have joined Slovenia in taking advantage of the increased interest in winter sports following the 2014 Winter Olympic Games held in Sochi. China, too, is rapidly expanding its ski industry (see the Case Study in Chapter 1), with plans to open up 250 new ski centers in Heilongjiang province alone in the next decade. Ski resorts are certainly popping up in some unlikely places. In 2014, the Masikryong Ski Resort in North Korea opened up, to the delight of young dictator Kim Jong Un. The winter wonderland is just one of Mr. Kim's tourism projects, as he has instructed state companies to boost numbers of foreign tourists from 200,000 a year to 1 million by 2016 (*The Economist*, 2014). The 1,400-hectare Masikryong resort sits at an altitude of 768m, and is said to have cost the regime \$35 million. The resort says it wants to attract 5,000 people daily, which might be a challenge, given that barely a few thousand North Koreans know how to ski.

In North America, the industry remains in a phase of maturity, characterized by increased consolidation and diversification. But looking back on the last few decades, there have been some significant changes in the industry in that part of the world. Table 12.1 puts a spotlight on the U.S. winter sport tourism environment in the years 1994 and 2014, showing that while overall skier/rider visits have not changed in 20 years, the composition of those on the slopes has. The number of downhill skiers on the slopes has dropped, while that of snowboarders has more than doubled. More females are participating in both activities, and participants tend to be older than they were 20 years ago. Perhaps of concern is a substantial drop in the number of lessons being taken today compared to 20 years ago, implying there might be fewer beginners taking to the slopes. Certainly, in the U.K. there are concerns that the poor performance of the schools market will have a negative impact on the number of new entrants to the sport.

	Snowboard 1994	Snowboard 2014	Downhill Ski 1994	Downhill Ski 2014
Number of participants (participated 2 times+)	2,061,000	5,991,000	10,620,000	8,337,000
Gender mix M/F	82 to 18	67 to 33	59 to 41	61 to 39
Frequency of participation				
Core= 9+ days	695,000	2,132,000	4,248,000	2,396,000
Casual 2 to 9 days	1,366,000	3,859,000	6,372,000	5,942,000
Age distribution				
Under 18	52.00%	30.00%	25.00%	25.00%
18 to 34 Years	39.00%	51.00%	49.00%	36.00%
35 to 54 Years	4.00%	18.00%	24.00%	33.00%
55+	3.00%	1.00%	3.00%	6.00%
Ethnic diversity				
White	NA	67.1	NA	67.3
Asian/Pacific Islander	NA	10.4	NA	11.6
Hispanic	8.00%	9.10%	7.80%	7.80%
Black	0.00%	10.20%	0.20%	9.60%
Notable Themes		1994	2014	
Skiers' and Snowboarders' concerns	Expense, Lack of time, Nobody to go with, risk of injury, don't know how to start	Expense, Lack of time, Nobody to go with, climate change, risk of injury, don't know how to start		
Business	Fed raises interest rates 6 times to curb inflationary pressure. Economy hurt by Northridge earthquake. Aerospace and defense industries cut spending/cost. House and commercial construction on the weak side.	Cyber security at the forefront of retail business concerns. Chinese middle class balloons, low cost production to Vietnam and Bangladesh. Smart phones used to research and purchase products. Apple introduces Apple Pay mobile wallet technology.		
Number of ski/ride areas	516	478		
Number of skier/rider visits	56,540,000	56,700,000		
AVG number of beginner lessons	7,684	6,189		
AVG number of lessons all levels	26,237	20,629		
AVG days open (areas)	118	125		
AVG % of snowboarder visits	10.80%	29.50%		

Table 12.1: Comparing 1994 to 2014 for the U.S. ski industry (Source: Adapted from Snowsports Industries America, 2014b, p. 5)