

SkiBase Results 2012

A unique analysis of the UK Snowsports Market

SAMPLE

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Introduction to SkiBase report sample

At the end of the 2010/2011 ski season SPIKE undertook broad market research with a national consumer panel to understand who would be likely to go skiing in 2011/2012.

The results of this were enlightening. It pointed us toward the conclusion that in the short to medium term the people who are likely to go skiing are those that have been skiing in the past - and even more so those that have skied in the recent past.

This is not a market that is going to be driven by people new to skiing; it is going to be – for the next few years at least – a market driven by people who have already been skiing.

Undeniably the ski market has shrunk in the last few years - which leaves a smaller base of customers for organisations to compete for. Having a better understanding of the people who are going skiing will help all those businesses and organisations that serve skiers to serve them better and so become more successful.

Out of this simple insight the methodology for this research exercise was determined. Who would have the best access to current and lapsed skiers? - Organisations that already operate in the ski market.

We worked with 11 carefully selected organisations who invited their customers and prospects to complete a comprehensive online survey. Recruitment was undertaken using email, Facebook and links on these organisation's websites. The 11 organisations encompassed tour operators, travel agents, tourist boards and travel providers. This gave us a comprehensive view on the market – people tend to have travelled with several tour operators or appear on the email list of one and be the customer of another.

There are more than 500,000 individual data pieces in our SkiBase database. These are available for bespoke analysis and to provide evidence for business decisions. Several organisations have worked with SPIKE and the SkiBase data to provide direction for complex business issues. If you would like to find out more about bespoke analysis and use of the data please contact us at info@spikemarketing.co.uk

The total number of people who completed the survey exceeded 18,000. This enables us to drill down into the data and still maintain statistical significance. Scores are available in great detail for countries, resorts and tour operators.

To avoid bias we have, for some of the analyses, re-sampled the data; where, for example, a particular destination or mode of travel was over-represented due to the responses from a particular participant organisation.

Please find below a sample section from the full report of 60 pages – ‘Countries and Resorts’. If you have any questions, or are interested in purchasing the full report, please email info@spikemarketing.co.uk

4.6 Countries and Resorts

4.6.1 Country retention rates. The winners and losers.

We asked people where they had been on their last ski holiday and where they intended to go next. This enabled us to see how well countries retained skiers and also to develop a 'steal matrix'. This allows individual markets to see from which markets they are gaining skiers and to which they are losing business.

This data shouldn't be confused with market share data but it does give a good indication of the attractiveness and dominance of specific ski countries. So, for example, Scandinavia has a relatively high retention score but a relatively low market share. The people who go on a Scandinavian skiing break enjoy the experience and want to go back, but not that many people from the UK go there in the first place.

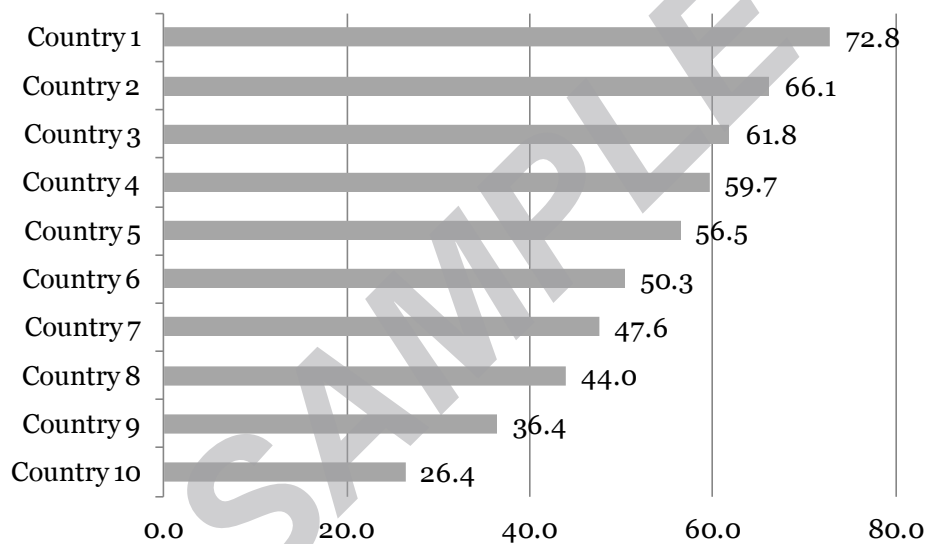


Figure 1: Retention rates by country (full details in report)

The chart above shows the retention rates for 10 major markets. It is calculated by asking people where their last ski holiday was, and where they intend to go next.

Country 1 tops this league – of the people who had skied in Country 1 on their last holiday - 75% say they intended to go back to Country 1 on their next ski holiday - a very strong performance. Country 2 – although relatively small in terms of the number of skiers who have been there, also performs well - as does the Country 3. The other countries and areas perform less well, with Country 10 coming at the bottom of this league.

4.6.2 Resort overview. The top 5 resorts globally.

SPIKE used Net Promoter Scores (NPS) to give a consistent metric to measure the performance of resorts, countries and tour operators.

The Net Promoter Score is a deceptively simple calculation that allows you to gauge satisfaction and performance by asking one question. You can find more about ‘NPS’ here: <http://www.netpromotersystem.com/book/index.aspx>

In our survey respondents were asked a simple question: ‘How likely would you be to recommend the resort you last visited to a friend or colleague?’ They were given a scale from 0 to 10 to tick, these scores ranging from highly unlikely to extremely likely.

The results were then analysed to produce the Net Promoter Score.

To do this people were classified as Detractors, Passives and Promoters. A Detractor is classified as someone who gives a score between 0 and 6. A Passive is anyone giving a score of 7 or 8 and a Promoter is someone scoring 9 or 10.

The % of detractors is subtracted from the % of promoters to produce the final Net Promoter Score. The average score for all ski resorts was 21. This is a reasonably good performance for the industry overall. However, it also masked a wide range of differences between resorts. The top score for a resort was 73 and the lowest was -40.

The table below shows the top 5 resorts globally that rated the highest.

Rank	Resort	Net Promoter Score
1	Whistler	?
2	Banff	?
3	Vail	?
4	Breckenridge	?
5	Tignes	?

Figure 2: Top 5 resorts by Net Promoter Score (full details in report)

4.6.3 What do skiers rate about the best resorts?

Together with the Net Promoter Score, we also asked people to rate the resort they had most recently visited against a set of specific criteria. These were:

- Quality of skiing
- Accommodation
- Value for money
- Restaurants and bars
- Lifts
- Activities outside skiing

Respondents scored these criteria on a 7 point scale ranging from ‘very bad’ to ‘extremely good’. Aggregated results for these top 5 resorts are given in the chart below.

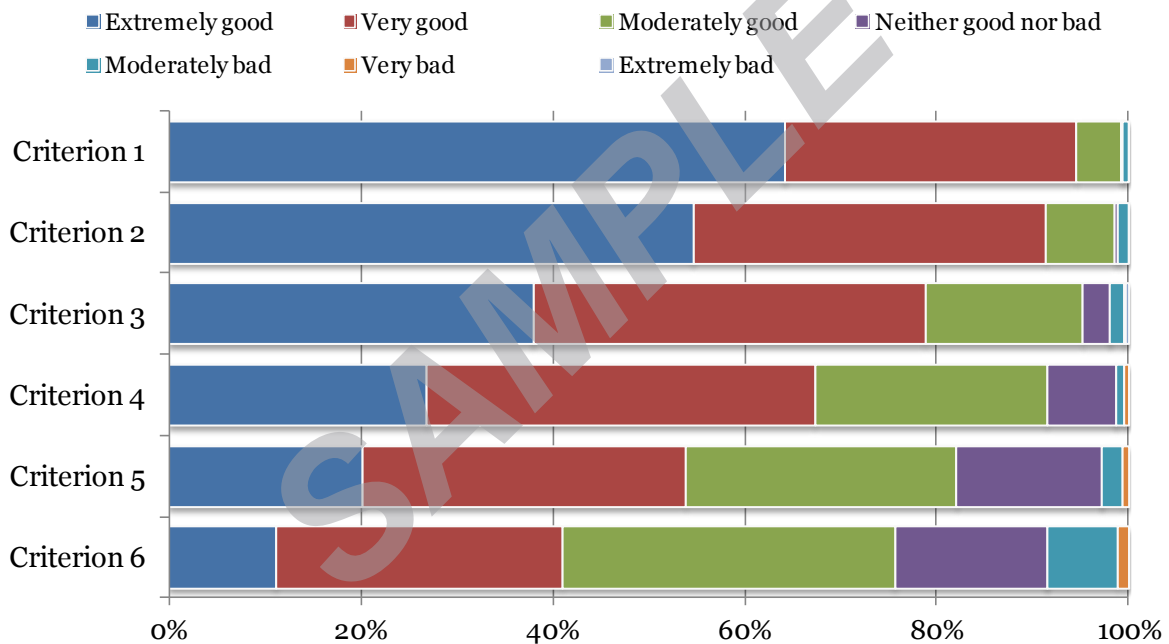


Figure 3: The top 5 resorts (full details in report)

The most important factor in generating a high score is the criterion 1 with 99% of respondents rating this moderately good or better for the top 5 resorts, but even the criterion that has least positive rankings – criterion 6 – has 75% saying this is moderately good or better.

It would seem that the best resorts do most things well but that the core of the ski holiday – criterion 1, criterion 2 and criterion 3 are all very highly rated.

4.6.4 Resort table. The top 50 European resorts.

Here we show the top 20 European resorts ranked by their Net Promoter Scores. Individual resort details are available on request (please contact info@spikemarketing.co.uk).

Rank	Resort	NPS Score
1	Resort 1	43.2
2	Resort 2	42.4
3	Resort 3	41.2
4	Resort 4	36.8
5	Resort 5	35.9
6	Resort 6	35.8
7	Resort 7	35.4
8	Resort 8	34.5
9	Resort 9	31.5
10	Resort 10	31.4
11	Resort 11	31
12	Resort 12	30.9
13	Resort 13	30.5
14	Resort 14	28.3
15	Resort 15	27.8
16	Resort 16	27.3
17	Resort 17	25.5
18	Resort 18	25.2
19	Resort 19	24.1
20	Resort 20	23.7

The table above is a sample of the top 50 resorts presented in the full report.

This is a sample section from the SkiBase Results 2012 report.

The full report is available to purchase online for £795 + VAT from www.spikemarketing.co.uk

Alternatively, you can contact us at info@spikemarketing.co.uk to purchase, or for more information.