“From A to B: What’s so new about hiking? - Is the comeback just a marketing bubble?”

9th World Congress on Snow and Mountain Tourism
Session 5: Re-invention of Hiking: An indispensable activity for mountain tourism

Andorra, 3rd of March, Dipl.-Geogr. Franziska Thiele
AGENDA

1. Demand in hiking tourism
2. A new customer profile
3. Hiking experience quality
4. Conclusion
Challenge: The rejuvenation of hiking tourism

1. Involvement
2. Expansion
3. Consolidation
4. Stagnation
5. Rejuvenation

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walking  trekking  hillwalking

HIKING
Positive development of hiking intensity (holiday and leisure)

**Demand for hiking in Germany (By share of population)**

- **2010**
  - Regularly: 44%
  - Occasionally: 23%
  - Seldom: 18%
  - Never: 15%
  - Not applicable: 2%

- **2014**
  - Regularly: 35%
  - Occasionally: 29%
  - Seldom: 11%
  - Never: 11%
  - Not applicable: 2%

**Source:**
- German hiking association: basic study about hiking as a leisure and holiday market 2010; data: CATI, n = 3,032
- GfK/IMT DestinationMonitor Deutschland (travel plans) 2013; n = 2,361 households

**Key Points:**
- Increase in total demand: 69 percent of hikers about 13 percent decrease of non-hikers
- Increase of „beginners“, i.e. people, who don’t go hiking very often
## German hiking market 2014

### Hiking intensity by age (holiday and leisure)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Yes, Regularly</th>
<th>Yes, Occasionally</th>
<th>More Rare</th>
<th>No, Never</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>60 years and older</td>
<td>17%</td>
<td>26%</td>
<td>29%</td>
<td>26%</td>
<td>2%</td>
</tr>
<tr>
<td>50 to 59 years</td>
<td>10%</td>
<td>24%</td>
<td>34%</td>
<td>30%</td>
<td>1%</td>
</tr>
<tr>
<td>40 to 49 years</td>
<td>9%</td>
<td>23%</td>
<td>36%</td>
<td>29%</td>
<td>3%</td>
</tr>
<tr>
<td>30 to 39 years</td>
<td>9%</td>
<td>19%</td>
<td>38%</td>
<td>31%</td>
<td>4%</td>
</tr>
<tr>
<td>up to 29 years</td>
<td>5%</td>
<td>25%</td>
<td>38%</td>
<td>30%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: GfK/IMT DestinationMonitor Deutschland(Reiseplanungen) 2013; all households, n=2,361 households.

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Five hiking-related target groups can be identified…

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Senior Travellers</th>
<th>Singles und Couples without children</th>
<th>Elderly People</th>
<th>Families</th>
<th>Young People</th>
</tr>
</thead>
<tbody>
<tr>
<td>- 50 to 65 years</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- no children under the age of 14 years in the household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- 30 to 49 years</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- no children under the age of 14 years in the household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- over the age of 65 years</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- no children under the age of 14 years in the household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- at least one children under the age of 14 years in the household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- under the age of 30 years</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- no children under the age of 14 years in the household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Volume in Germany (% relating to all hiking interested persons)

<table>
<thead>
<tr>
<th></th>
<th>Senior Travellers</th>
<th>Singles und Couples without children</th>
<th>Elderly People</th>
<th>Families</th>
<th>Young People</th>
</tr>
</thead>
<tbody>
<tr>
<td>6,7 mil.</td>
<td></td>
<td>6,4 mil.</td>
<td>4,3 mil.</td>
<td>4,1 mil.</td>
<td>3,2 mil.</td>
</tr>
<tr>
<td>(27%)</td>
<td></td>
<td>(26%)</td>
<td>(17%)</td>
<td>(17%)</td>
<td>(13%)</td>
</tr>
</tbody>
</table>

Source: IMT Destination Brand 13; n=11,000
Shifting demographics of hikers…

…a younger target group discovers hiking

Sources: German hiking association: basic study about hiking as a leisure and holiday market 2010; CATI, n=3,032 and GfK/IMT DestinationMonitor Deutschland (Reiseplanungen) 2013; all households, n=2,361
*Deviations from 100 % through rounding differences

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Change of values – Hiking serves new needs…

Search for nature, silence and deceleration in contrast to everyday stress

a recreational way of experiencing the landscape and nature environment
<table>
<thead>
<tr>
<th>hiking motives</th>
<th>position hiking study 2014*</th>
<th>change of position compared to the basic research 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>enjoing/ experiencing nature</td>
<td>1.</td>
<td>0</td>
</tr>
<tr>
<td>being active</td>
<td>2.</td>
<td>0</td>
</tr>
<tr>
<td>health promotion</td>
<td>3.</td>
<td>0</td>
</tr>
<tr>
<td>experiencing a region</td>
<td>4.</td>
<td>0</td>
</tr>
<tr>
<td>reducing stress</td>
<td>5.</td>
<td>+2</td>
</tr>
<tr>
<td>clearing one´s head</td>
<td>6.</td>
<td>0</td>
</tr>
<tr>
<td>recuperation</td>
<td>7.</td>
<td>+1</td>
</tr>
<tr>
<td>gaining new impressions</td>
<td>8.</td>
<td>-3</td>
</tr>
<tr>
<td>discovering something new</td>
<td>9.</td>
<td>0</td>
</tr>
<tr>
<td>relaxing</td>
<td>10.</td>
<td>0</td>
</tr>
<tr>
<td>socialising</td>
<td>11.</td>
<td>+1</td>
</tr>
<tr>
<td>self reflection</td>
<td>12.</td>
<td>+3</td>
</tr>
<tr>
<td>being free</td>
<td>13.</td>
<td>-2</td>
</tr>
<tr>
<td>doing active sport</td>
<td>14.</td>
<td>0</td>
</tr>
<tr>
<td>recollecting oneself</td>
<td>15.</td>
<td>+1</td>
</tr>
<tr>
<td>Gaining experience</td>
<td>16.</td>
<td>-3</td>
</tr>
<tr>
<td>broadening the horizon, doing sth for learning</td>
<td>17.</td>
<td>0</td>
</tr>
<tr>
<td>religious/ spiritual reasons</td>
<td>18.</td>
<td>0</td>
</tr>
</tbody>
</table>

source: GfK/IMT Destination Monitor Deutschland (Reiseplanungen) 2013; n=1,621 hiker; Deutscher Wanderverband: Grundlagenuntersuchung Freizeit- und Urlaubsmarkt Wandern 2010; n=1,698 active hiker

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### Development of Infrastructure: Quality is on the Move….

<table>
<thead>
<tr>
<th>Certifications</th>
<th>2010</th>
<th>2014</th>
<th>Growth %</th>
</tr>
</thead>
<tbody>
<tr>
<td>„Qualitätsweg Wanderbares Deutschland“ (DWV)</td>
<td>62</td>
<td>105</td>
<td>+70%</td>
</tr>
<tr>
<td>Premiumweg (DWI) (short trails)</td>
<td>200</td>
<td>350</td>
<td>+75%</td>
</tr>
<tr>
<td>„Qualitätsgastgeber Wanderbares Deutschland“ (DWV)</td>
<td>1.300</td>
<td>1.450</td>
<td>+11,5%</td>
</tr>
</tbody>
</table>

- **New quality certifications since 2010:**
  - „Leading Quality Trails – Best of Europe“ (European Ramblers Association (ERA))
  - „Qualitätsregion Wanderbares Deutschland“ (DWV)
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Experience is not considered as an additional service, it is demanded as a core service.

Hikers search for intensive, new and unusual experiences in nature.

The „setting“ will be the most successful factor if the product quality is developed on a high level.
Four fields of development…

Basics of experience quality

Infrastructure

Cooperation

Sense of place

Communication
Creating connection to the landscape

- **Improve quality**: A sustainable profile formation in the market segment is given only, if the infrastructure quality is developed continuously.

- **Tell a story**: Focus and communicate the specific characteristics of the region/landscape: What is special about this region?

- **Meet the needs**: Hiking is the perfect way to experience this specific landscape.

- **Create products**: Hiking regions are developed through cross-linking of the trail system with other suppliers. With the integration of other segments, such as health care, culinary art and other outdoor activities hiking regions improve their competitiveness.
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Hiking tourism has great potential…

- The hiking market is stable – greatest potential lies especially in the younger target group and in day trips (during vacations)

- outdoor tourists are searching for spectacular landscapes

- to stimulate hikers' interests it is important to communicate hiking and its benefits

- The increasing competition between hiking destinations requires a new understanding of quality in hiking tourism

Picture: varuna / Shutterstock.com
Key success factors

- Primary focus on infrastructure management and quality development
- Conscious advertisement of unique nature and specific landscape
- Product design: Focus on „special“ performances/elements
- Communication of hiking experience with information and emotions, especially applied to digital media

→ Adjustment of the „Customer-Journey“ for each particular target group
Thank you for your attention!