

SKIING IN CENTRAL EASTERN EUROPE

Czech Republic - Poland - Slovakia



Tomáš Zukał, General Director
Europe-Mountains.com
StayPoland.com

MOUNTAIN RANGES IN CENTRAL EUROPE

THE CARPATHIANS

- Tatras (High / Low): over 2000 m
- Beskidy / Beskid – Pieniny – Fatra, etc.

Countries: Czech Republic, Poland, Slovakia, Ukraine, Romania

THE SUDETES

- Krkonose / Karkonosze (Riesengebirge / "Giant Mts.")
- Jeseníky (Gesenke) etc.

Countries: Germany, Czech Republic, Poland

Other smaller mountain ranges in CZ:

Krusné Hory (Erzgebirge), Šumava (Böhmerwald, Bohemian Forest)

RESORT LOCATIONS

KRKONOSE

KARPACZ
SZKLARSKA POREBA
SPINDLERUV MLYN
JANSKE LAZNE
HARRACHOV
PEC POD SNEZKOU



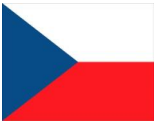
BESKID

SZCZYRK
USTRON
WISLA

TATRAS

ZAKOPANE
STRBSKE PLESO
TATRANSKA
LOMNICA
JASNA

ACTIVE SKIERS IN POPULATION



• **18-22%** **Czechs**



• **3-10%** **Poles**



• **16-22%** **Slovaks**

POTENTIAL: 4-7 MILLION SKIERS

(sources: CZ: Cesky svaz lyzaru, PL: GUS 2008 & estimates; SK: estimate)

SKI LIFT STATISTICS

In each of the 3 countries:

- **2-3 GONDOLA LIFTS**
- **60-75 CHAIR LIFTS (+ 10% per year)**
- **400-500 SURFACE LIFTS**
- **50-80 SKI RESORTS (2+lifts)**

A large number of small ski runs with one ski lift.



CZECH SKI RESORTS 1

All major Czech ski resorts are in the Krkonose Mountains

SPINDLERUV MLYN (1235 m above sea, 700-800k skiers)

- Quality compact resort, 6 stars (Czech grading), “Czech St. Moritz”
- 19 pistes (25 kms), longest piste 2,7 km
- 4 skiing areas - 5 chair lifts - 11 drag lift
- 2 FIS pistes (Women's Alpine Skiing World Cup - Giant Slalom)
- 85 km cross-country skiing trails

JANSKE LAZNE (1260 m, 500-600k skiers)

- Ski resort Cerna Hora → 3 ski areas 5km from one another
- Hot springs
- Investments, quick development
- 8-seat cable car - 3 chair lifts - 22 surface lifts
- 28 pistes (20 km), longest 3 km
- 70 km cross-country skiing trails



CZECH SKI RESORTS 2

PEC POD SNEZKOU (1215 m, 300-400k skiers):

- Below Snezka (1602 m) - season up to 5 months
- Family-style resort, cheaper accommodation
- 3 chair lifts – 10 surface lifts
- 150 km cross-country trails: Krkonosska Magistrála

HARRACHOV (1020 m, 150-200k skiers):

- Relaxed, low-key environment
- Ski-jumping world cup, K-185 on Certova Hora
- 8 pistes (8,5 km), longest 2 km
- 3 chair lifts – 6 surface lifts
- Plans to connect with Rokytnice nad Jizerou → biggest CZ ski resort

New trend - unified regional ski passes:

- **SKIARENA KRKONOSE (pistes 36,8 km):** Pec pod Snezkou, Janske Lazne, Velka and Mala Upa
- **SKIREGION.CZ (pistes 40,5 km):** Harrachov, Rokytnice and Paseky nad Jizerou, Rejdice, Prichovice



HARRACHOV & CZ KRKONOSE (source: Harrachov ski area)



POLISH SKI RESORTS 1

SZCZYRK (Beskid Mountains, up to 1257 m):

- Most pistes in CE Europe: 37- 45 km, (14 km the biggest resort)
- Long pistes: blue 5.3 km, red 3.1 km, black 2.8 km
- Crowded in season, especially weekends
- Great potential, however, state-run & low investments
- Old infrastructure: only 2 chair & 24 surface lifts
- Low skier satisfaction

ZAKOPANE (Tatra Mountains, up to 1987 m):

- Polish “winter capital”
- Very popular: estimated 3 million visitors per year
- Registered 20k beds – possibility 100k?? private (unregistered) beds
- Kasprowy Wierch: 16 km pistes (longest “schuss” 10 km)
- About 16 ski lift providers (1 gondola, 7 chair, 24 surface) - 27 km
- No shared ski pass



ZAKOPANE: Gubalowka (source: Biuro Promocji Zakopanego)




POLISH SKI RESORTS 2

KARPACZ & SZKLARSKA POREBA (Karkonosze, 1360-1370 m):

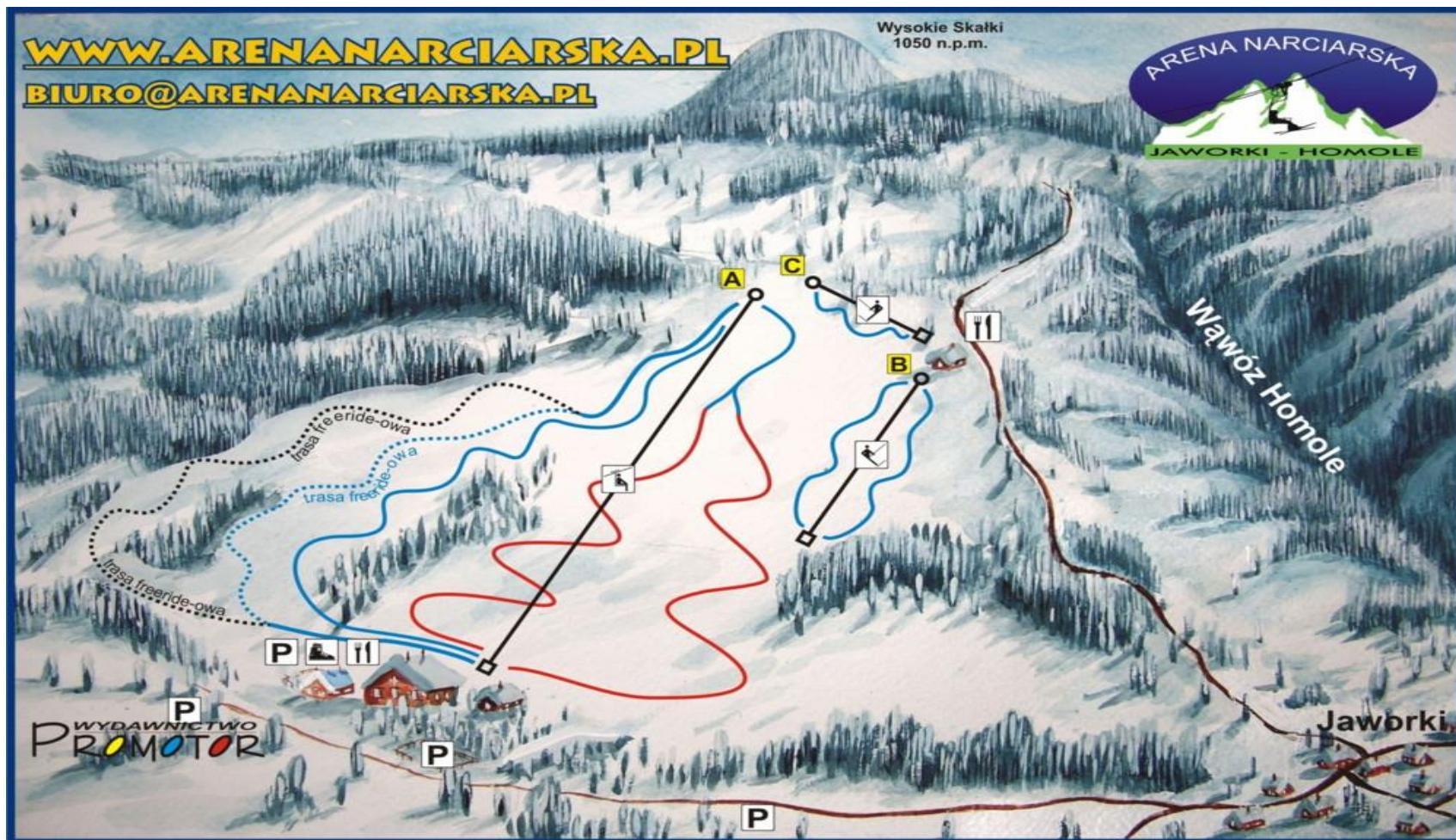
- 2 most important resorts in the PL Karkonosze / Giant Mountains
- Szklarska Poreba (18,3 km pistes) - Karpacz (9,5 km)
- 2 chair lifts / resort. Surface lifts: Karpacz: 28 - Szklarska Poreba: 26

JAWORKI (Pieniny, 1050m):

- Surprise winner of customer satisfaction survey by Onet.pl (March 2010)
- Village (not yet well-known in Poland)
- 1 chair & 2 surface lifts, 5 pistes: max. 900 m

 **PL Experienced: low approval of bigger Polish ski resorts.**
(>>>“patriotic ski disobedience”)

 **PL Beginners: fine with small, cheap (12-15 EUR/ day) areas.**



JAWORKI ski area (source: www.skiarena.pl)



SLOVAK SKI RESORTS 1

JASNA - CHOPOK (Low Tatra, 2024 m):

- CE Europe's largest / alpine-type ski resort
- **Both sides** of Chopok Mountain - connected in 2007
- 1 cable car. 6 chair & 17 surface lifts. 30-34 km pistes. 1 ski pass.
- Jasna = Choice. Cost of ski pass: up to 31 EUR.

STRBSKE PLESO + DONOVALY (Big Fatra) + VELKA RACA (Beskid) = PARKSNOW.SK

- 1 ski pass for 3 quality resorts in 3 Slovak mountains
- Strbske Pleso (7 km). Lovely setting in High Tatra: new 5*+ Kempinski hotel
- Donovaly (11 km). Family-style (200-250k skiers). Central Slovakia.
- Velka Raca (12 km) near the CZ/ PL border (120-150k skiers)

Advantages of seasonal ski pass:

- Skiing & discovering Slovakia
 - Various ski dates in various resorts – money savings
- In 2010 planned 1 ski pass for High Tatra as a whole region.



JASNA: north & south (source: jasna.sk)



SLOVAK SKI RESORTS 2

OTHER HIGH TATRA RESORTS

TATRANSKA LOMNICA

- Cable car to the top of second highest Slovak mountain Lomnický štít
- Longest ski piste: 5.5 km in SK Tatra. Highest start point in CEE: 2200 m

SMOKOVEC

- Atmospheric spa resort between Strbské Pleso and Tatranská Lomnica

OTHER POPULAR GOOD VALUE RESORTS IN SLOVAKIA:

- **KUBINSKA HOLA**: pistes 14 km. 9 ski lifts
- **MARTINSKA HOLA**: 12 km, located high 1500 metres
- **PLEJSY**: 10 km, best resort in south-eastern part of SK mountains
- **PEZINSKA BABA**: 3 km, just half an hour drive from Bratislava

SKIERS - COUNTRY OF ORIGIN

CZECH KRKONOSE (RIESENGBIRGE / GIANT MTS.):

- Czechs: 45-65%
- Poles: 25-40%
- Germans: 5-15%
- Dutch: 5-10%
- Remaining 1-5% (Denmark, Russia, Lithuania, Latvia, Israel)

SLOVAK TATRA & OTHER MOUNTAINS:

- Slovaks: 20% (CZ/PL) - 50% (Tatra) - 95% (near Bratislava)
- Poles: 0% (near Bratislava) - 25% (Tatra, Centre) - 50% (CZ/PL border)
- Czechs: 0% (East) - 15% (Tatra, central Slovakia) - 30% (CZ/PL border)
- Hungary: 0% (CZ/PL, Bratislava) - 5 to 10% (Tatra, Centre) - 20% (South-East)
- UA or RUS: 0% - 5% (Tatra)
- Remaining 0-2% (Lithuania, Romania, UK)

POLISH MOUNTAINS:

- Poles: 85-100%
- UA or RUS: 0-5% (approx. 20-30% of all Zakopane guests in 1st half of January)
- German: 0-5% in Polish Karkonosze and Beskid
- British: 0-5% (30% of STAYPOLAND.COM customers in Zakopane)

HOW TO SELL RESORTS IN CEE?

1. CULTURE



“OUT OF THE ORDINARY” EXPERIENCE

2. BUDGET



LOWER COSTS

3. LOCATION



CENTRAL EUROPE

4. SKIING



EXCEPTIONAL SKIING EXPERIENCE

1. CULTURE: “OUT OF THE ORDINARY”

CZECH KRKONOSE 👍

- Czech beer & cuisine
- Acceptable or very good infrastructure
- Proximity of Prague
- History, architecture, folk tales
- Frontier feeling



ZAKOPANE (POLISH TATRA) 👍

- Winter Capital of Poland
- Krupowki boulevard and nightlife
- Proximity of Krakow
- "Gorale" (highlanders) culture, cuisine, music, wooden architecture



SLOVAK MOUNTAINS 👍

- Highest Carpathian mountains
- Aquaparks and Thermal spa
- Fascinating cave systems
- UNESCO: Spišsky Castle, Levoca, Banská Štiavnica
- "Koliba" restaurants; folklore and tales; gypsy music (High Tatra)
- Acceptable or very good infrastructure



2. BUDGET: LOWER COSTS

- “Locally premium” position themselves as “better value” compared to resorts abroad in the elevation 800-1500 m; and “low cost” in comparison with resorts in the Alps.
- All 3 countries are currently comparable price-wise.
- A stay in lesser-known resorts is 30-50% cheaper than the “locally premium” CE Europe's ski resorts

2. BUDGET: LOWER COSTS (EXAMPLES)

- **ADULT SKI PASS:** 32 EUR (Jasna - SK) - below 10 EUR / day
- **CHILDREN SKI PASS:** 16 EUR down to 4 EUR (ski instruction)
- **SKI INSTRUCTION:** 30-12 EUR / 1 hour (private) to 6-4 EUR/ pax (small group)
- **SKI & BOOTS RENTAL:** 15-10 EUR / day
- **HOTELS (price per double):**
 - ***** 350-100 EUR (Kempinski | Villa Marilor & Litwor Zakopane)
 - **** 200- 60 EUR
 - *** 150- 40 EUR
 - ** 50 – 10 EUR
- **GUESTHOUSES / HUTS:** even 5 EUR / person
- **2 COURSE DINNER:** 12-5 EUR
- **SNACKS:** 3-2 EUR
- **BEER 0,5l:** 2-1 EUR
- **PRIVATE TAXI Poprad Airport – High Tatra Ski resorts:** 10-15 EUR
- **REAL ESTATE**

3. LOCATION: CENTRAL EUROPE

KRKONOSE / KARKONOSZE (Riesengebirge/ Giant Mountains)

- 2 h Prague & Wroclaw
- 3 h Dresden
- 4,5 h Berlin
- 7,5 h Warsaw
- 9,5 h Copenhagen & Amsterdam

SZCZYRK

- 1,5 h Katowice
- 5,5 h Warsaw

TATRA MOUNTAINS

- 2 h+ Krakow - Zakopane
- 3 h+ Krakow- Strbske Pleso
- 4 h Bratislava
- 5 h Budapest
- 6 h L'viv (Ukraine)
- 7 h Warsaw - Zakopane ||| Prague - Slovak Tatra

POPRAD AIRPORT

2009/2010: **1-2 H** flights from **Basel, Bologna, Bratislava, London, Warsaw**, charters from **Moscow**

FURTHER INTERNATIONAL AIRPORTS

Prague – Krakow – Wroclaw

4. SKIING: EXCEPTIONAL SKI EXPERIENCES

SPINDLERUV MLYN (CZ):

- Black & red FIS piste + choice of high standard pistes in 3 areas
- Fantastic cross-country skiing: Krkonosska magistrála (150 km trails)

ZAKOPANE - KASPROWY WIERCH (PL):

- Cable car & the 10 km Schuss (black + red) to Zakopane – Kuznice

JASNA (SK):

- The biggest Alpine-type resort in CEE, well-prepared pistes
- Biggest choice: over 30 km of pistes on Chopok Mt. North & South

Lower cost contenders: Janske Lazne (CZ), Donovaly (SK), Krynica(PL)



(source: Skiareal Spindleruv Mlyn)



(source: Kitewing, Slovak Tourism Agency)



(source: PKL Kasprowy Wierch archive)

COMPETITION: THE ALPS

Closest Austrian ski resort **SEMMERING**: 2 hr drive from Bratislava and southern CZ

- ▶▶▶ **Competition even for 1 day skiing.**
- Biggest competitor for weekly stays.**

THE ALPS:

- better snow and pistes quality
- bigger choice
- wider pistes
- fewer people on the run & shorter queues
- better après-ski, more nightlife
- longer skiing season
- more sunny days (suntan)
- advanced organization
- trend-setters
- sounds better to go to the Alps than CE Europe
- very effective discount strategy

CZECH SKIER HOLIDAYS

2008/2009:

23,7% annual growth of Czechs with ski holiday abroad

Preferences of CZ skiers in 2009

Czech ski resorts: 829 000 skiers

The Alps: 652 000 skiers

Average total main holiday spending / person:

Czech ski resorts: 170 EUR (avg 6 nights)

The Alps: 600 EUR (avg 7,5 nights)

(source: iDNES.cz, 06/02/2010)

THREATS

1. ECONOMIC CRISIS / LOWER FINANCIAL SECURITY

- Most perceptible in Slovakia (2008/2009 coupled with strong EUR – fewer arrivals from key markets PL and CZ)
- Fewer sign-ups for kids' skiing lessons.
- More difficult financing
- ▶ **Most resorts have already invested and plan to continue.**

2. CLIMATIC CHANGES

- Unreliable weather. Shorter season (3-4 months).
- Often impossible to use snowmaking

3. ECOLOGICAL LIMITATIONS

- Need for resort expansion. Mountains national heritage (national reserves).
- ▶▶ **Necessity to find consensus and avoid the huge potential for corruption.**

THREATS (cont.)

4. FINANCING

- Ski business on lower elevations more risky → bank loans more difficult.
- Grants for snowmaking possible with EU funding.
- ▶ **Buying used chair ski lifts from the Alps (up to 50% savings)**

5. UNDER-INVESTMENT IN STATE PROPERTY

- The resorts with biggest potential in Poland (e.g. Karpacz, Korbiewo, Szczyrk) were not privatised. Other state priorities for investments = bad infrastructure.

6. LACK OF COOPERATION

- Small resorts in PL owned by independent entrepreneurs with low levels of mutual trust.
- Difficulty to introduce unified ski passes

7. LOW STAFF MOTIVATION

- Low salaries (limited job offers in region & risky business for the owners)

ACHIEVABLE GOALS

SKIERS FROM LOCAL COUNTRIES:

- **Keen & Demanding:** 1-2 weekends per year
- **Experienced accepting limited choice:** 1 holiday / year (3-7 days) + 1 weekend
- **Beginners:** Ideal place in Europe to learn skiing.

SKIERS FROM OTHER EUROPEAN COUNTRIES:

- **Experienced:** a good reason for visiting CEE
- **Beginners:** ideal place in Europe to learn skiing

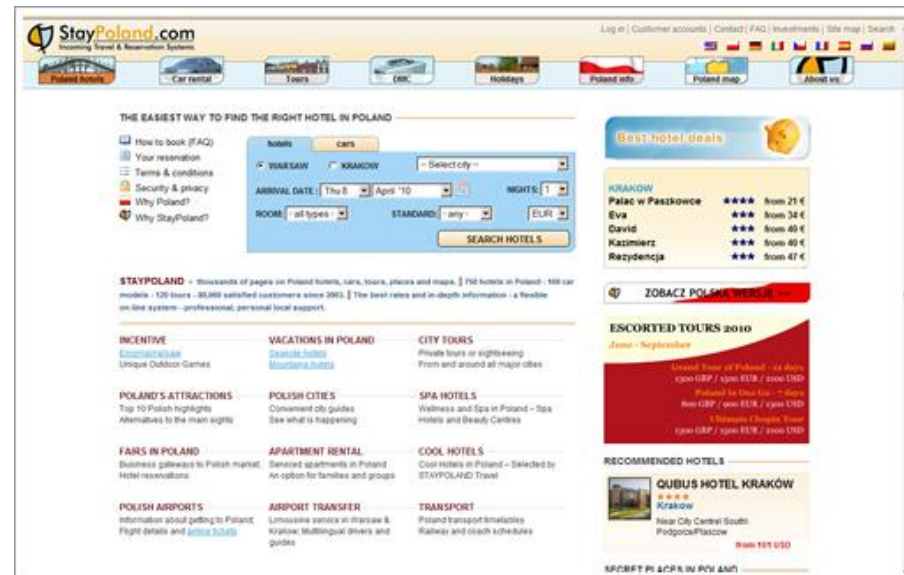
STRATEGIES

- 1. GREAT VALUE FOR BEGINNERS (now)**
- 2. PROMOTE UNIQUE CEE EXPERIENCE**
- 3. SKI PROVIDERS TO CO-OPERATE**
- 4. MORE CONNECTIONS / QUICK TRANSPORT FROM AIRPORTS**
- 5. BEAR RISKS & PROVIDE OUTSTANDING SERVICE = BEST PR**
 - ▶▶ *Social pressure on ski service providers & their expectations.*
 - ▶▶ *Growing sense of responsibility and mutual trust in community.*
 - ▶▶ *State or EU subsidy to facilitate even bigger pistes choice & shorter waiting time.*

THANK YOU



www.europe-mountains.com



www.staypoland.com

Tomáš Zukał, STAYPOLAND
t.zukał@europe-mountains.com