



Final Presentation Consider 2014

Group 6: Johanna Kubisch, Sonja Pieters, Alex Level, Irena Ignatavicienė, Thanh Thuy Nguyen, Marita Schneider

Agenda

1. Introduction
2. Methodology
3. Data Analysis
 1. Ski touring practice and country differences
 2. Gender and consumer needs
 3. Practice differences dependent on the consumer objectives
 4. Different equipment requirements according to ski touring practice
 5. Additional analysis
4. Conclusion and recommendation

1. Introduction

- ▶ Popularity of ski touring ➡ increasing number of practitioners
- ▶ Fast technological developments
- ▶ Aims of the survey: Get deeper information about ...
 - ▶ The consumers of ski touring equipment
 - ▶ Their requirements and needs
 - ▶ Country and gender related differences
 - ▶ On what the consumer focuses regarding ➡ Motivation

2. Metodology

- ▶ Online **questionnaire** sent to 10 participating countries
- ▶ Questionnaire contains questions about:
 - ▶ Ski touring practice
 - ▶ The buying behavior
 - ▶ Ski touring equipment: boots and bindings
 - ▶ Profile of the consumers

- ▶ Creation of a **Data Analysis Plan**
- ▶ **Data Analysis:**
 - ▶ In sum we got 703 responses
 - ▶ Countries Switzerland, Germany/Austria and France were chosen

3. Data Analysis



3.1 Ski touring practice and country differences

Preference of practitioners toward On-Piste/ Off-Piste in ski touring

Mean of all conducted European countries is 6.72



Scale: From 1 (100% on Piste) to 10 (100% off Piste)

Significance of the relation is very high:

- ✓ French practitioners highly appreciate off Piste practice
- ✓ Austria and Switzerland have a preference for off Piste practice too
- ✓ All the countries go on Piste as well

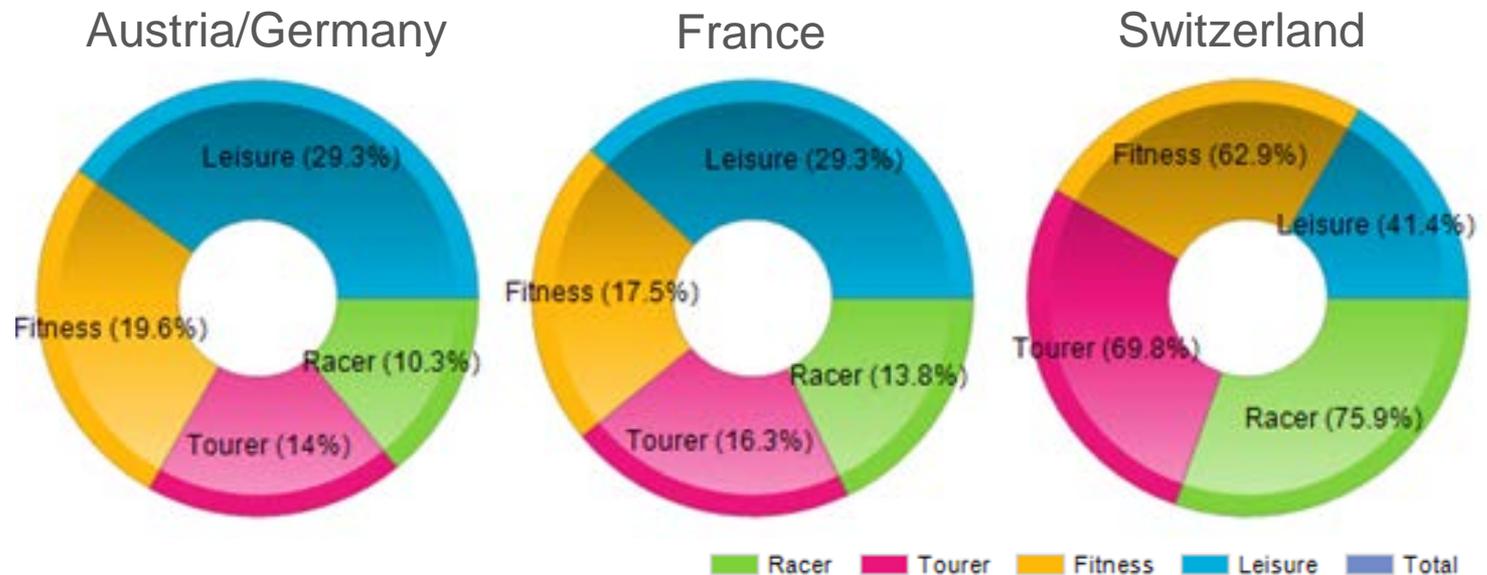
3. Data Analysis



3.1 Ski touring practice and country differences

The practice habits related to the objectives

- ✓ Austria /Germany and France ➡ Leisure and Fitness
- ✓ Switzerland ➡ Racer and Tourer
- ✓ For touring Switzerland



3. Data Analysis



3.1 Ski touring practice and country differences

Preference of practitioners toward going up and going down

Mean of all conducted European countries is 6.06



Scale: 1 (100% going up) to 10 (100% going down)

- ✓ All the three countries are below the European mean
- ✓ Austria/Germany has the highest preference for going down
- ✓ Switzerland lightly prefer going up the mountain

3. Data Analysis

3.1 Ski touring practice and country differences

Level of difficulties

- ✓ Austria/Germany ➡ easy routes
- ✓ France ➡ medium routes
- ✓ Switzerland ➡ hard routes

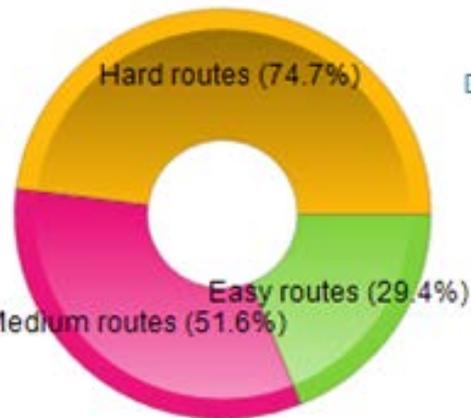
Austria/Germany



France



Switzerland



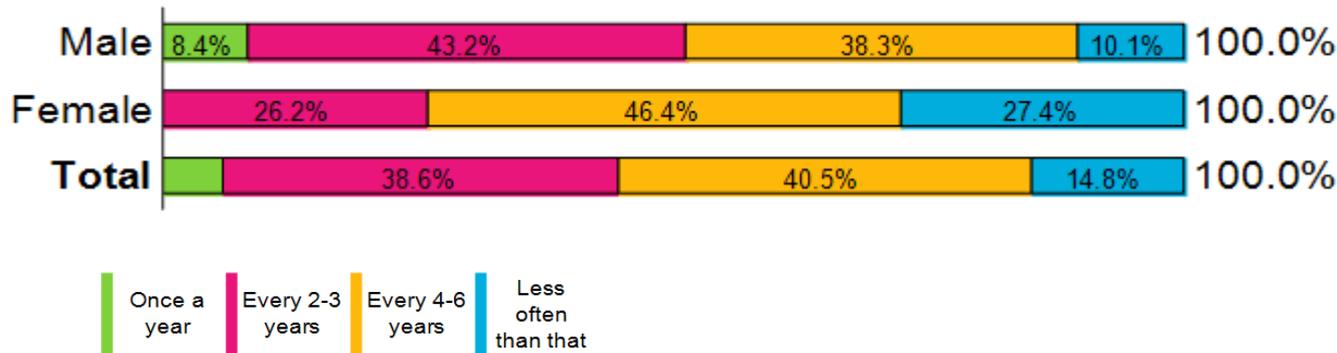
■ Easy routes
 ■ Medium routes
 ■ Hard routes

3. Data Analysis

3.2 Gender and Consumer needs



The purchase behavior of women and men in contrast



Women and men have a different purchase behavior:

- ✓ Men change more often their boots than women
- ✓ Female mainly change boots every 4-6 years

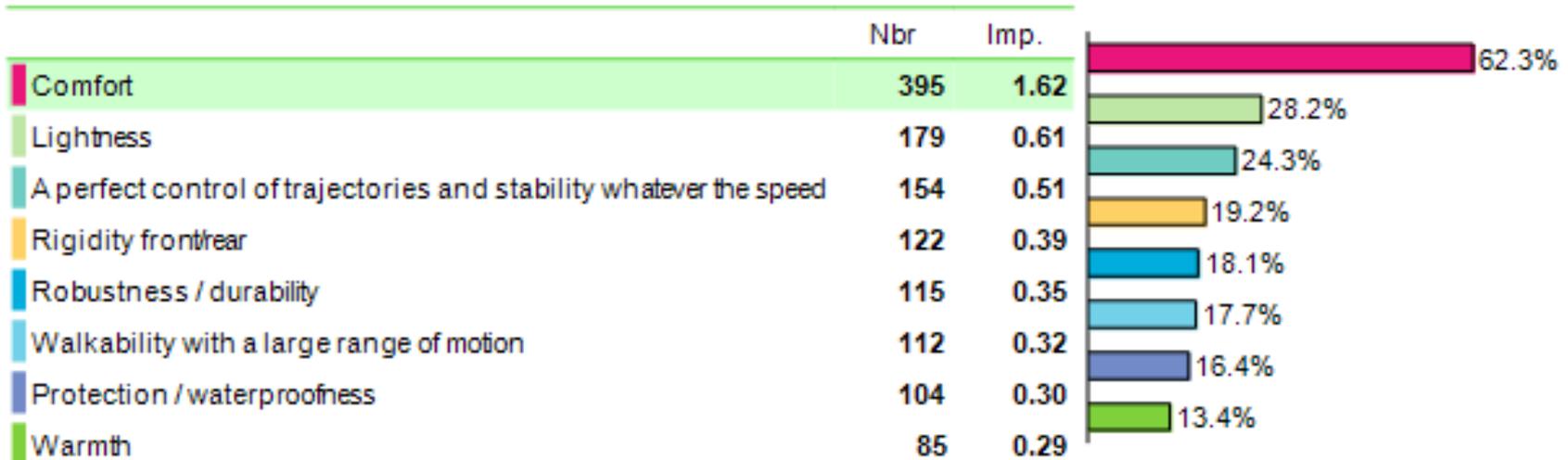
Gender have different purchase behaviors!

3. Data Analysis

3.2 Gender and Consumer needs



The three most important criteria regarding touring boots for women **and** men



Summary of the detailed data:

- ✓ Slightly difference between gender
- ✓ Difference refers to countries
- ✓ Please see detailed data enclosed



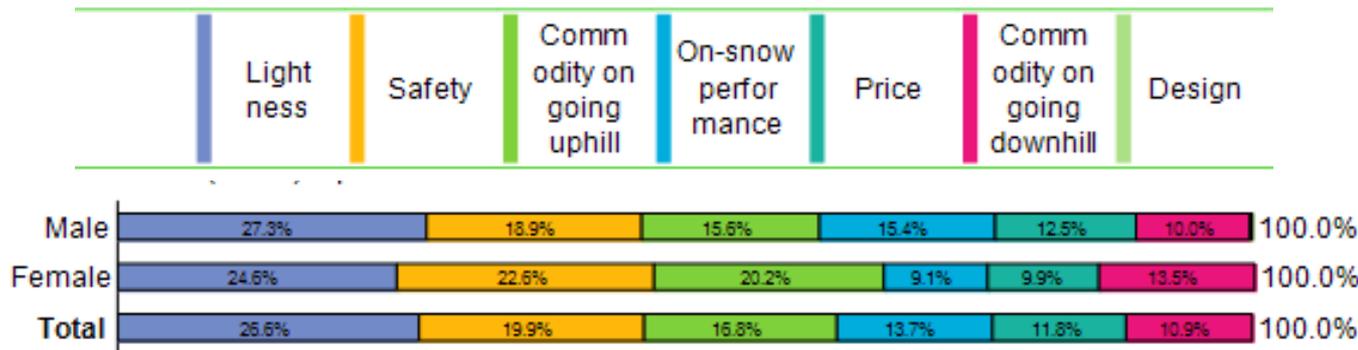
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3. Data Analysis

3.2 Gender and Consumer needs



The significant relation between important criteria for bindings and gender



There is only a slight difference between women and men regarding the important criteria for binding:

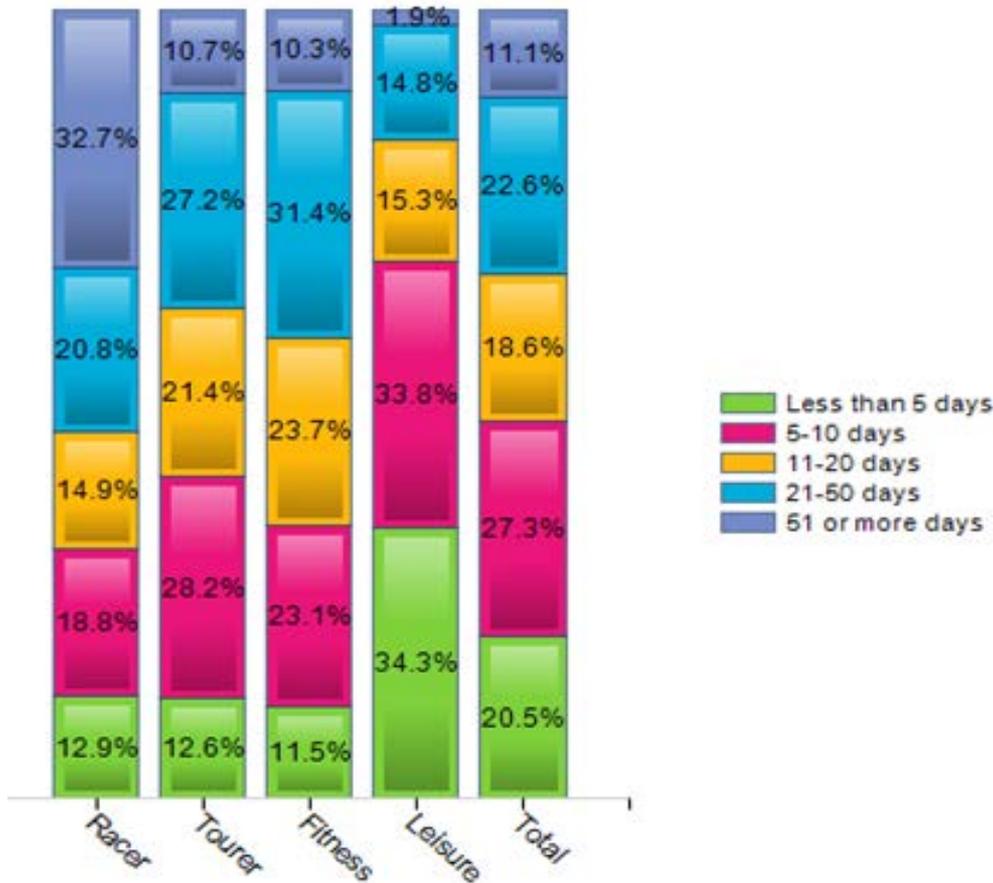
- ✓ Male focus on the lightness of the material
- ✓ For female the security is more important than for men

3. Data Analysis



3.3 Practice differences dependent on the consumer objectives

Objectives of practitioners related to the time practitioners spend



✓ Number of days spend on ski touring depends on consumer objectives

✓ Racer practice most often

✓ Tourer are mostly practicing between 5 and 50 days per year

3. Data Analysis



3.3 Practice differences dependent on the consumer objectives

The relation between the consumer objectives and the on Piste practice is very significant

Scale: from 1 (100% on Piste) to 10 (100% off Piste)



- ✓ Tourer are practicing more off Piste than on Piste
- ✓ Have special requirements regarding equipment

3. Data Analysis



3.3 Practice differences dependent on the consumer objectives

Significance of the relation between consumer objectives and the preference of practicing

Scale: From 1 (going up) to 10 (going down)



✓ Tourer and Leisure have a lightly preference for going down

✓ Racer and Fitness have no significant preference for one practice type

3. Data Analysis

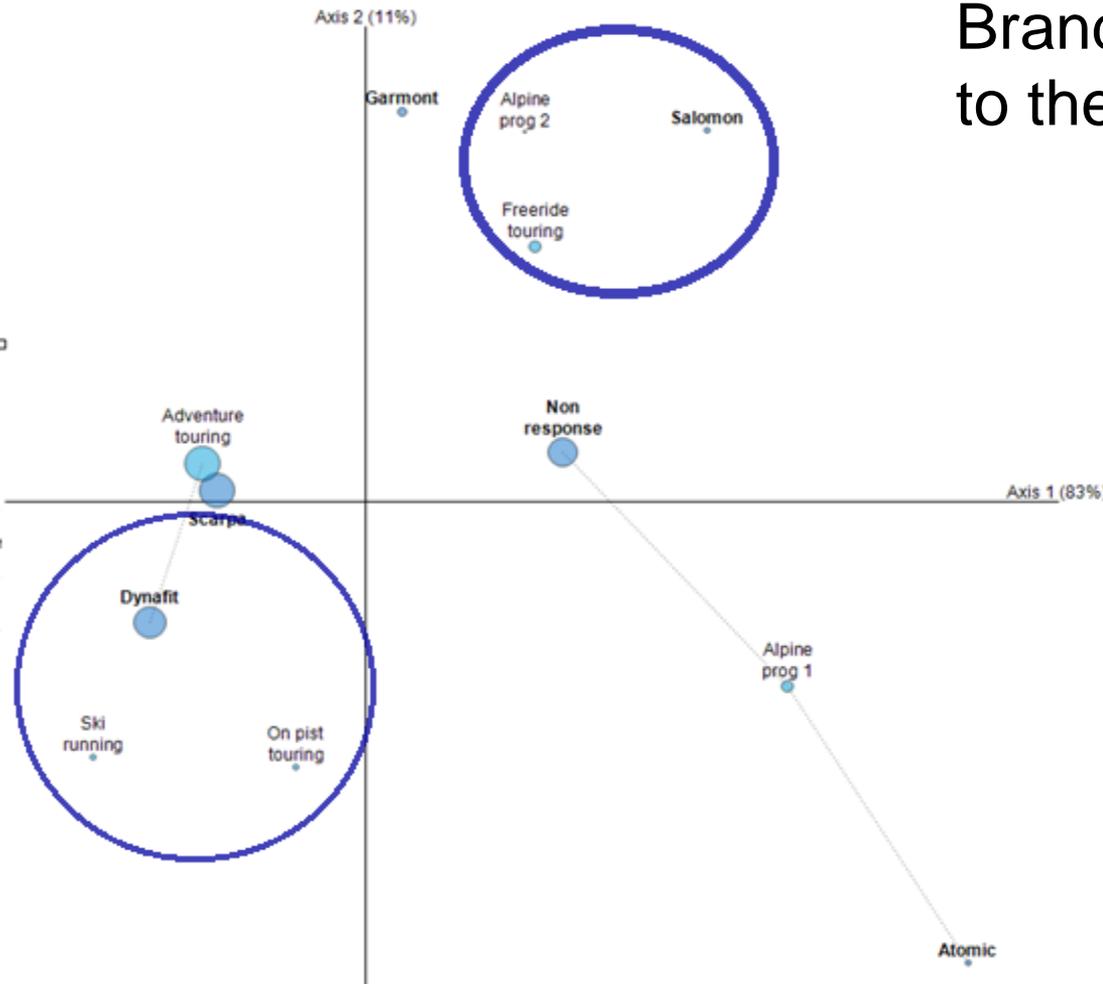


3.4 Different equipment requirements according to ski touring

Brands of ski boots related to the touring practice

✓ **Salomon** is preferred by Freeriding Tourer and Alpine Programme 2

✓ **Dynafit** is used by On Piste Touring practitioners and for Ski running

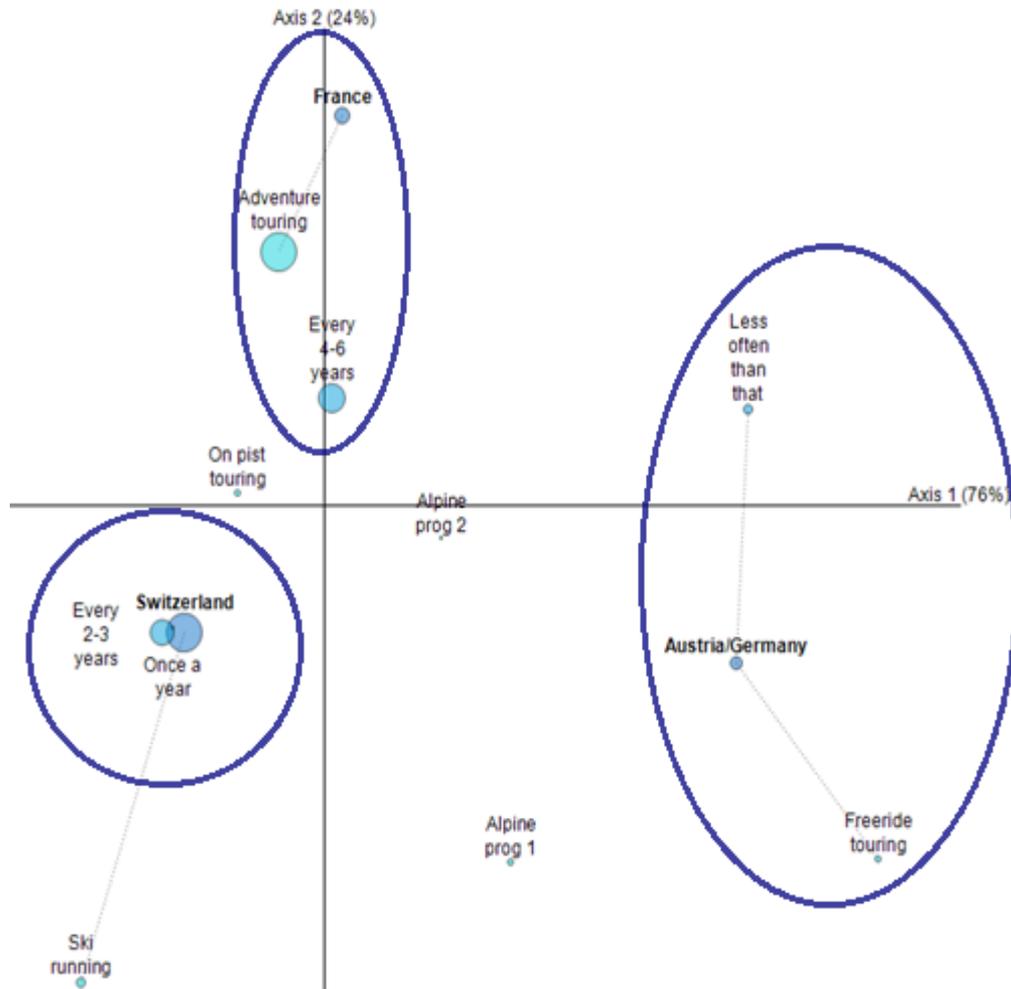


3. Data Analysis

3.4 Different equipment requirements according to ski touring

Relation between the 3 countries, the ski touring practice and the regularity of buying boots

✓ Switzerland (Ski running, on Piste touring) changes boots most often



3. Data Analysis

3.4 Different equipment requirements according to ski touring

Austria & Germany

- ✓ Practice habits: preference for on-pist and alpine programme 2
- ✓ Buying habits: Lightness and warmth

France

- ✓ Large variety of practice habits (ski running, freeride touring, on-pist touring, alpine prog 1 & 2).
- ✓ Buying habits are different according to the practice

 Focused on the control of trajectories and stability for ski touring practitioners

Switzerland

- ✓ Practice habits: preference for Ski running and alpine programme 1 & 2
- ✓ Mostly focused on the lightness and the warmth of equipments.



3. Data Analysis

3.5 Additional Analysis



Place of buying according to the age

	18-25	31-35	51-55
Where do you generally go to buy your touring equipment?	Flea market/Second hand shop (13 , 8.1%)	Internet (43 , 28.3%) Large chain sports store (13 , 8.6%)	Large chain sports store (19 , 28.4%)

The table shows the most significant modalities.

Modalities 'Over 75 years old', '71-75', '66-70', '61-65', '56-60', '46-50', '41-45', '36-40', '26-30', 'Under 18 years old' don't have any characteristic element.

- ✓ The younger people are the more sensitive they are to price
- ✓ Middle age people would rather buy on internet or large chain
- ✓ The older people are the more they are buying on large chains



3. Data Analysis

3.5 Additional Analysis



Place of buying according to the annual budget

	0-250 euros	250-500 euros	800 + euros
Where do you generally go to buy your touring equipment?	Outdoor specialist store or brand store (73 , 44.5%) Large chain sports store (38 , 23.2%) Flea market/Second hand shop (15 , 9.1%) Other (9 , 5.5%)	Internet (56 , 27.1%)	Internet (49 , 16.7%) Flea market/Second hand shop (3 , 1.0%)

The table shows the most significant modalities.

Modalities 'I always use rental equipment', '500-800 euros' don't have any characteristic element.

✓ For Low Budget consumers are really sensitive

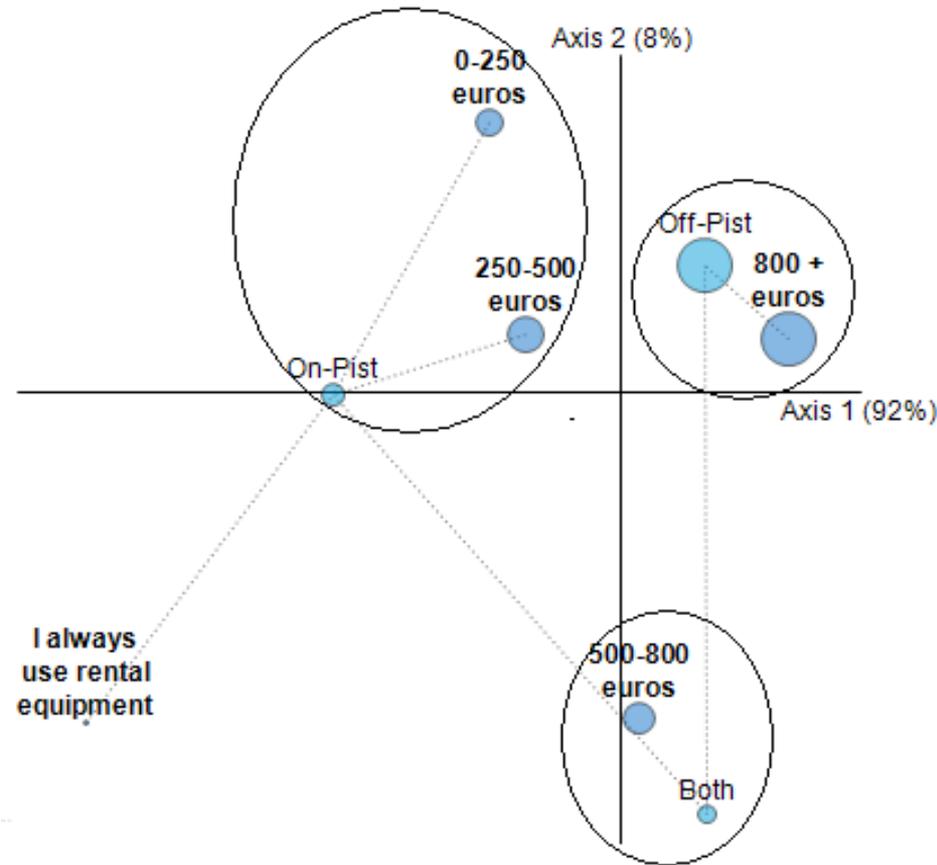
➡ use Multichannels

✓ For Medium Budgets ➡ use Internet

✓ Big annual Budget ➡ Internet and second hand shop

3. Data Analysis

3.5 Additional Analysis



✓ The on-piste practitioners are more regarding on their budget and try to make economy:

✓ Practitioners of both on and off piste are less regarding

✓ Off-piste practitioners seem to be really passionate

4. Conclusion and recommendation (1)

1. Practicing Habits

1. People practice On Piste and



2. Countries only have a slight preference for going down

➔ need equipment that fulfill both requirements

4. Switzerland highest involvement

2. Gender differences

1. Gender have different purchase behavior regarding skiing boots

2. Gender differences are effected by country differences

3. Regarding to some criteria we speak about gender differences, others are related to country differences

4. Conclusion and recommendations (2)

1. Practice Habits and Objectives

1. The Practice Habits depend on the objectives of practitioners → Tourer practice off Piste and on Piste have different requirements

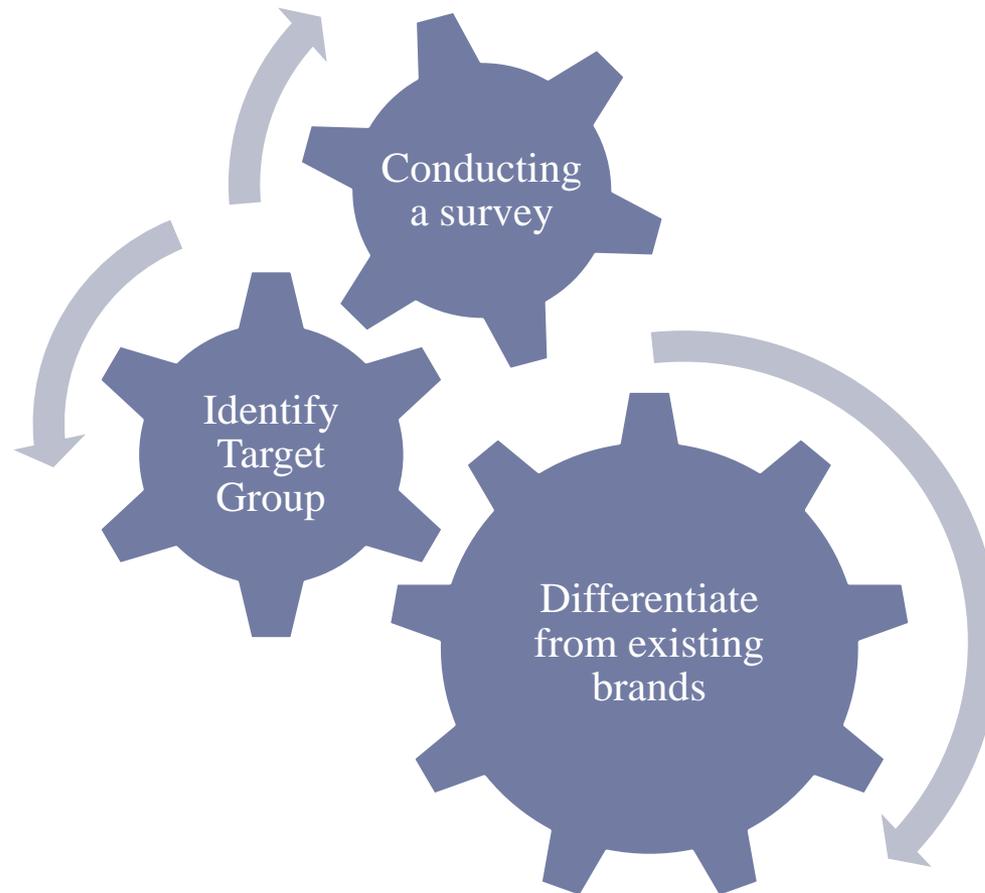
2. Practice Habits and equipment

1. The different practitioner types have different brand preference → Salomon is used by Freeride Tourer and Alpine Programme 2

3. Additional Analysis

1. Try to attract younger people in large chain by promotion and attractive prices

4. Conclusion and recommendation (3)



Thank you for your attention!

