

Hiking: A Megamarket

A short Survey of Modern Hiking Tourism

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1. The Rediscovery of Hiking

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Growing numbers of hikers

| Germans claiming to hike | 1985 | 1995 | 2002 | 2008 |
|----------------------------|------|------|------|------|
| % of the German population | 45 | 50 | 54 | 56 |

International sports equipment fair
Munic 2009:

Estimated expenses of German
hikers for their hobby:
€15b per year

40% of all sports equipment retailers say:
Hiking equipment was the segment with the highest
turnover in the outdoor market

75% of them say:
Hiking has of high growth potenial

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The expanding hiking market

eg

Numerous new first class hiking paths

eg Rothaarsteig, Rheinsteig, Traumpfade

High quality certificates

eg „Deutsches Wandersiegel“, „Qualitätsbetriebe Wanderbares Deutschland“

Marketing cooperations

eg „Top Trails of Germany“, „Best of Wandern“, „Wander-Gasthöfe“

Lots of new hiking travel agencies

eg „Wikinger“, „Kleins Wanderreisen“, „TUI“

Rankings and awards

eg „Deutschlands schönste Wanderwege“, „Wander-Award“

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Hiking in the media

eg

Growing number of hiking reports

in papers, mags, on radio and TV

New hiking mags

partly conversion of outdoor to hiking mags

Lavish new internet portals

eg wandermagazin.de, fernwege.de, wanderbares-deutschland.de

Hiking as a subject of trade fairs

eg in Düsseldorf, Stuttgart, Karlsruhe

Renaissance of travel accounts about hiking

eg by Kerkeling, Andrack, Grober, Büscher,

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Alpine initiatives

eg

**Hiking villages in Austria
European- und Tyrolian hiking Hotels**

**Swiss Trails
1.480 km Adlerweg Tyrol
5.000 km Via Alpina in 8 countries**

Research on hiking:

„Profilstudien Wandern“

**Since 1998
regular surveys of active hikers
in nearly all German-speaking countries**

Up to now more than 18.000 data records

2.

The Background: Longing for Nature

The framework:

Living in a glass menagery

Behind the glass:

In the apartment, at work, in school
in one's freetime, the sports hall, the supermarket
In the car, on the bus, on the train

In front of the screen

TV, PC, Internet, Mail, Mobile ...

The hectic of modern lifestyle

Eco-psychology

Turbo civilisation causes mental fatigue
by one sided concentration and too many external stimuli

**Contacts with nature are connected to
„effortless attention“**

**Hilking balances permanent brain work
in sedentary jobs**

Students' hiking motivation 2007

| | |
|-------------------------------|------|
| stress release | 60 % |
| contrast to brain work | 67 % |
| enjoying beautiful landscapes | 81 % |

Living near nature

**„Very important“ reasons for choosing
one's place of living**

| | |
|-------------------------------------|-------------|
| Natural Environment | 56 % |
| Good public transport | 44 % |
| close to friends | 32 % |
| close to shopping centres | 26 % |
| close to my workplace | 25 % |
| close to freetime facilities | 15 % |

Source: Forsa 2007

Nature as a holiday paradise

The core motive „experience of nature“

| Long term trend | important | very important |
|-----------------|-----------|----------------|
| 1987 | 40 % | |
| 1997 | 70 % | 30 % |
| 2007 | 80 % | 40 % |

Source: Reiseanalysen

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Ideological background:

Nature as a paradise

| | adults | young people |
|-----------------------------|--------|--------------|
| Nature is harmony and peace | 72 % | 73 % |
| Nature is always good | 74 % | 73 % |

Source: www.natursoziologie.de

The meaning of life

What is your personal location of spirituality?

1. nature 41 %
2. church 18 %
3. soul 15 %

Swiss survey 2008

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Profilstudie Wandern 2008:

Motives for hiking

- | | |
|----------------------------------|------|
| 1. Enjoying landscape and nature | 88 % |
| 2. Being active for one's health | 70 % |
| 3. Being together with friends | 62 % |

More or less out of date:

- | | |
|--------------------|------|
| sporty hiking | 18 % |
| Walking in a group | 6 % |

3.

Reviving the Nature of Man

Eco-psychology:

Green landscapes ...

or even images of them

... **enhance positive feelings**

like joy, happiness, contentness, freedom

... **reduce negative feelings**

like stress, grief, anxiety, anger, aggression, neuroticism, depression

Opposite effects are caused
by urban environment

Eco-psychology:

Views of a beautiful nature

reduce

heartbeat and blood pressure
muscle tension and skin conductivity

enhance

judgement and selfcontrol
creativity and inventiveness
attention and concentration

The positive effects of regular hiking in prevention and therapy of

metabolism (cholesterol, overweight, diabetes)
cardio vascular system , immune system, cancer, skeleton
psychosomatic problems, depression, ...

Gesundheitskongress Wandern 2007

www.wanderforschung.de/Gesundheit

Self-awareness of hikers:

After a hiking tour being in a better

| | |
|--------------------|------|
| physical condition | 77 % |
| mood | 74 % |

Profilstudie Wandern 2008

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Hiking for health?

„Staying healthy is the main reason for
going on a hiking tour“ yes 37 %

I just hike for fun!

„In the first place I like hiking because it is fun.
Improving my health is a nice side effekt“ yes 63 %

Profilstudie Wandern 2008

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4.

**The Focus:
Nature und Landscape**

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**Where does hiking become
an experience in nature?**

The landscape should

1. be beautiful

enhancing feelings of wellness and security

and

2. make you curious by

a variety of experiences,
the magic of distant lands, exciting adventures

Ulrich Gebhard, psychologist

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That is valid all over the world:

What is a beautiful landscape?

much nature, little civilisation
open landscape, large space, wide views

undulating countryside, soft ground
curved contours

unspoilt streams and lakes
natural quiet, fresh air

rich variety of impressions

Cultural scene
instead of wilderness

Scientific background:
the theory of evolution

Profilstudie Wandern 2004

Preferred types of landscapes

Survey made in ...

| | <u>low mountain ranges</u> | <u>the Alpes</u> |
|--------------------------|----------------------------|------------------|
| lots of views | 59 % | |
| lots of forests | 49 % | |
| low mountain ranges | 61 % | 32 % |
| the Alpes: high pastures | 43 % | 60 % |
| the Alpes: high summits | 25 % | 41 % |

Preferred hiking destinations:

Nature on top of the list

- | | |
|-----------------|---|
| 1. place | unspoilt nature views, summits caves, ravines, waterfalls |
| 2. place | forests, fields, heath nature reserves, animal reserves castles, churches, pubs |
| 3. place | conservation centres arts installations museums |

Profilstudien Wandern 1998 - 2004

Preferred paths

| | |
|-------------------------------|-------------|
| small paths | 57 % |
| grassy and earthy ways | 54 % |
| gravel lanes | 6 % |
| tarmac lanes | 1 % |
| ways beside roads | 1 % |

Profilstudien Wandern 1998 - 2004

5.

Consumer Orientation: Who is the Modern Hiking Tourist?

Statistically based features

Average age: 49

Women's share: 50 %

A level / diploma 50 %

(Upper managerial staff: 68%)

Profilstudien Wandern

Core motives in comparison

| | Central Europe | |
|-------------------|---------------------|-----------|
| | low mountain ranges | the Alpes |
| Enjoying nature | 84 % | 83 % |
| physical activity | 64 % | 62 % |
| partner/friends | 58 % | 53 % |

Profilstudie Wandern 2004

Core-Aversions in comparison

| Preferred hiking paths | Central Europe | |
|-------------------------|---------------------|-----------|
| | low mountain ranges | the Alpes |
| through housing estates | 6 % | 3 % |
| parallel to roads | 1 % | 1 % |
| on tarmac lanes | 1 % | 2 % |

Everyone is annoyed about the same

Financial potential of hikers

More than €500 extra money to spend per month

| frequent hikers | hikers now and then | average German |
|-----------------|---------------------|----------------|
| 29% | 24% | 22% |

W&V-Wanderstudie '09

Willingness to spend money on ...

| | frequent hikers | occasional hikers |
|---------------------|-----------------|-------------------|
| ... good food | 62 % | 56 % |
| ...travelling | 59 % | 50 % |
| ...health, wellness | 47 % | 39 % |

Consequences:

Hikers are attractive customers

But they are
**hard to please
and very individualistic!**

Mainstream target group:

**Hikers
who enjoy the landscape
and do it only now and then**

6.

Hiking as an Element of Lifestyle

Growing individualism

Increasing preference for individual tours:

| | | |
|------|------|------|
| 2008 | 2006 | 2003 |
| 55 % | 46 % | 36 % |

Declining preference for guided tours:

| | | |
|------|------|------|
| 2008 | 2003 | 1998 |
| 8 % | 10 % | 15 % |

Consequence:

Of great importance for hikers:
marked hiking paths 70 %
signposts, information plates 60 %

Profilstudien Wandern

Social networking:

Feeling good with friends

I like tours

| | 2008 | 2006 | 2003 |
|----------------------------|------|------|------|
| with my partner or friends | 62 % | | |
| in a big group | 6 % | 7 % | 13 % |

Normally I am accompanied by

| | |
|-------------------------|------|
| 1 person (partner) | 35 % |
| 2 to 5 people (friends) | 43 % |
| more than 10 people | 7 % |

Profilstudie Wandern 2008

Culinary or cultural breaks?

When hiking I like visiting

| | |
|----------------------|------|
| a cultural highlight | 31 % |
| a museum | 26 % |

| | |
|---|------|
| While hiking I like visiting a pub | 39 % |
| After hiking I like visiting a restaurant | 56 % |

Profilstudien Wandern 2006/08

**What do hikers do in their holidays
when they are not hiking?**

| | 2006 | 2003 |
|-------------------------------------|-------------|-------------|
| visiting cultural highlights | 57 % | 44 % |
| going on trips | 55 % | 42 % |
| strolling in a city | 39 % | 23 % |

Profilstudie Wandern

Even hikers want to be entertained

7.

**Characteristics of
Favourite Tours**

Day trips are most prominent

Preferred hiking tours

| | |
|--|------|
| lasting | |
| for half a day | 42 % |
| for a full day | 51% |
| ending where they start (circle tour) | 60 % |

Profilstudie Wandern 2008

Today's tour: a circle tour 64 %

A market niche only:

Preference: tours lasting

| | |
|--------------|------|
| several days | 24 % |
| especially | |
| 2-3 days | 18 % |
| a week | 9 % |

Reality:

People hiking more than 1 day
on the day of the survey:

10%

Hiking comfortably

Average hike

| | |
|---------------------------------|----------------------------|
| length: | about 14 km |
| duration: | about 4 h |
| speed: | about 3,5 km/h |
| frequency: | 2-3 times per holiday week |
| beginning | about 9 to 11 o'clock |
| distance home - starting point: | about 30 km |

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important: nice breakfast before a tour, snack on a tour

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Who gives the incentives for the tours?

%

| | | | |
|---------------------|-----------|-------------------|----|
| Friends | 63 | Papers, magazines | 31 |
| Maps | 40 | Internet | 29 |
| Hiking books | 38 | Radio, TV | 15 |
| brochures | 31 | Walking clubs | 10 |
| | | Holiday fairs | 4 |

Profilstudien Wandern 2008

**Friends tell each other,
what was good or bad !**

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8.

What about Quality?

Hikers are longing for

the exceptional event

of a well chosen tour

Promoting XXL km hiking paths
doesn't meet any consumer needs.

**Remember: Only 8 % of all hikers like guided tours.
Therefore the hiking event must develop on ist own**

On the hiking market
there ist not only a competition
between landscapes, destinations and holyday centres,

but between

high profile hiking paths

with lots of new experiences

Quality in hiking management
means focussing on the wishes
of consumers

The grass must be tasty for
the cows, not the farmer

9.

Best of Hiking: Premiumways

The hiking tourist comes first

First class hiking on top trails

Seal of quality:
**Deutsches
Wandersiegel
Premiumweg**



**34 criteria
subdivided into up to 200 features
measured per kilometre**

**A quality label for
first class hiking paths**



34 criteria of quality in 5 categories

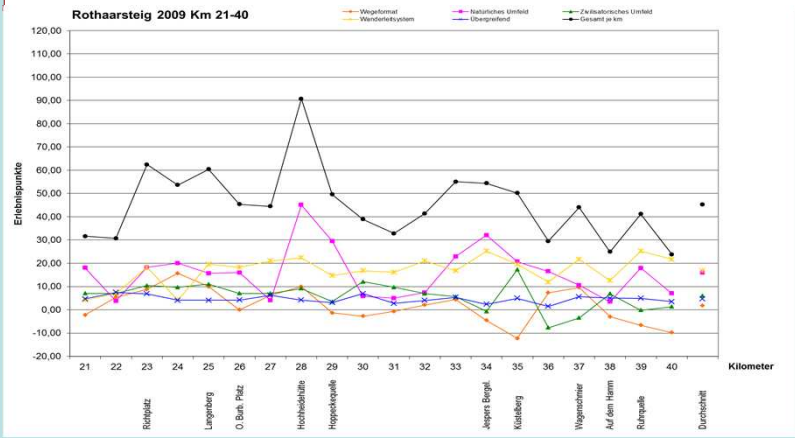
- | | | | |
|----------------------------------|-------------------|---------------------------------|-------------------|
| A. The way itself: | 7 criteria | C. nature and landscape: | 9 criteria |
| B. Wayfinding facilities: | 5 criteria | D. cultural elements: | 8 criteria |
| E. general: | | 5 criteria | |

Additionally 7 core criteria, each of which has to be fulfilled

eg

- | | |
|---------------------------|---|
| tarred tracks: | not more than 15% and not more than 1,2 km in succession |
| on main roads: | not more than 3% and not more than 150 m in succession |
| beside main roads: | not more than 10% and not more than 1,2 km in succession |

Example Rothaarsteig: quality points per km
 Coloured : 5 categories black: total



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The pionier project

Rothaarsteig

5 years after it started



The same strategy

The same success



Independant research in 2005:

More than 1m hikers on the trail

About €32m turnover

That equals about 800 workplaces

Result: complete revival of Rothaargebirge and Rhine as hiking destinations

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Premium trails for day tourists:



offered as an ensemble

**Label for local hiking quality
Presenting the regional variety
Flexible elements in tourist programmes**

Pioneer projects on the rivers Rhine, Moselle, Saar:

**Lots of new guests,
Hiking trails of the year,**

**enthusiastic catering trade,
Mekka of the tourist industry**

10.

Premiumways Tested

Quality certificates as factor in forming a brand

Master thesis Immo Wahl (2010)
University for applied science Eberswalde:

**„Experts are convinced
of the certification of leading hiking paths“**

**„Traditional hiking areas gradually lose their customers
by the success of certified hiking paths
in less famous regions“**

The future of hiking tourism:

**creating optimized
hiking paths**

**professionally planned, marketed
and well kept**