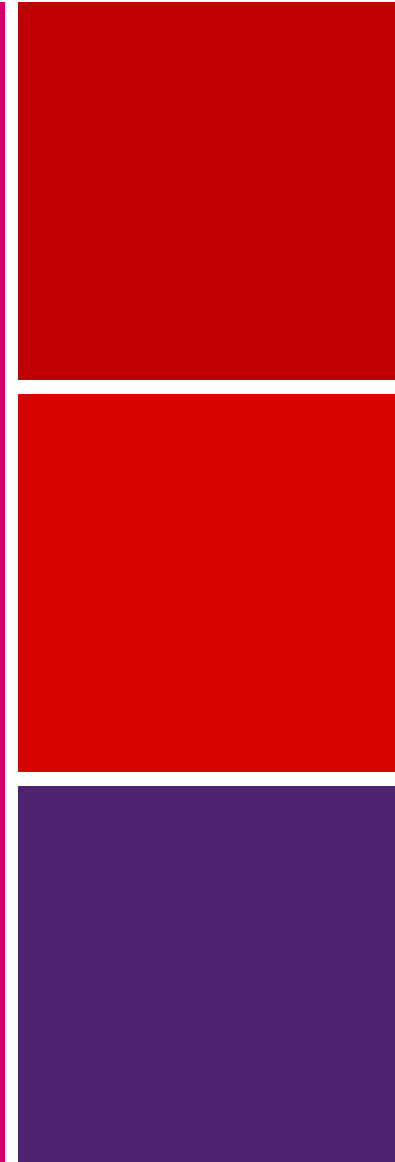


# First experiences in the mountains

A quantitative analysis by Karmasin Behavioural Insights



<p>Scope</p>	<p><b>This study has been used to determine the perceptions of people who spent their first holiday in the mountains — ever or for the first time after a minimum of 8 years.</b></p>
<p>Methods / Target groups</p>	<p><b>A total of 854 online interviews were conducted in Austria, Germany, Switzerland and Italy.</b></p> <p><b>The survey was conducted among people who had spent their holidays in the mountains for the first time ever, or since min. 8 years.</b></p>
<p>Survey timeframe</p>	<p><b>29.03.2021 – 13.04.2021</b></p>

Online interviews per country

213 people from  
Austria



232 people from  
Germany



208 people from  
Switzerland



201 people from Italy



## Sample breakdown

Characteristics	%	Number
	100%	(854)
<b>GENDER</b>		
Male	47	399
Female	53	455
<b>AGE</b>		
18-29 years	20	173
30-49 years	47	400
50+ years	33	281
<b>EDUCATION</b>		
No school-leaving certificate	38	324
School-leaving certificate or higher	62	530
<b>COUNTRY</b>		
Austria	25	213
Switzerland	24	208
Germany	27	232
Italy	24	201
<b>LIFESTYLE TYPES</b>		
Type 1 — Relaxed	31	266
Type 2 — Adventure	36	310
Type 3 — Fun & entertainment	33	278

## Lifestyle type evaluation

Evaluating the lifestyle types was done through a cluster analysis of the answers to question 24.

How important are the following in your life?

Graded using a scale of 1=very important to 5=not important

	very important			not important	
	1	2	3	4	5
Achievement	1	2	3	4	5
Personal growth	1	2	3	4	5
Safety	1	2	3	4	5
Entertainment	1	2	3	4	5
Fun	1	2	3	4	5
Adventure	1	2	3	4	5
Relaxation	1	2	3	4	5
Connection to nature	1	2	3	4	5
Tranquillity	1	2	3	4	5

The following types were then identified:

Type 1: Relaxed

Type 2: Adventure

Type 3:  
Fun & entertainment

These are described subsequently.



### Demographics

- Female (56%)
- 30-49 years (46%)

### Behaviour

- I like to have a handle on what's going on, but sometimes I can also be persuaded to be more spontaneous (68%).
- I need some time out on my own every now and then, because it can all get a bit much being around people (62%).
- I like to relax when I'm on holiday (56%).

### Holidays in the mountains

- In addition to enjoying the beautiful scenery (83%), physical relaxation (53%) and mental relaxation (60%) were what people expected from a holiday in the mountains.
- This group's expectations of their holiday were met the most. They found fault the least.
- Connection to the mountains tended to increase the most. 63% of this group were surprised how beneficial the tranquillity in the mountains was.
- Main activities undertaken were walking (87%) and hiking (73%).



### Demographics

- Male (49%)
- 30-49 years (46%)

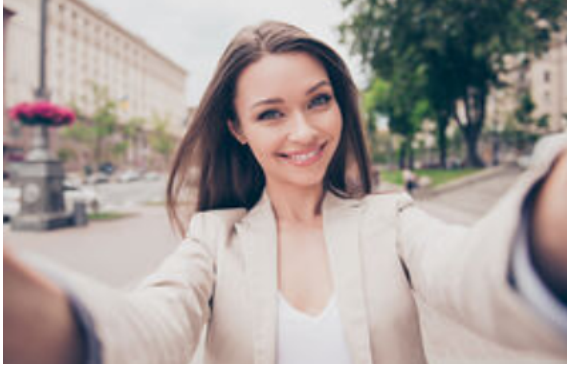
### Behaviour

- I'm always on the lookout for the next adventure. It would be boring if my life was all planned out and structured (32%).
- Achievement is important for 62% of this group.
- Safety tended to be viewed as less important compared with other groups.

### Holidays in the mountains

- 44% expected athletic activities for their holiday in the mountains.
- This group's expectations of their holiday were met the least.
- The holiday changed their sense of connection to the mountains the least for this group.
- Having sports activities and facilities on location was most positively viewed by this group.
- This group mostly went climbing (14%) and mountain biking (13%).
- This group was more likely however, to rate their holiday as boring.

## Type 3: Fun & entertainment



### Demographics

- Female (53%)
- 30-49 years (49%)

### Behaviour

- Love being among people (33%).
- Entertainment is important in their lives (76%).
- They like to relax when on holiday.

### Holidays in the mountains

- 39% said that for their first holiday in the mountains, it was important to get to know their home country better (this was strongest among this group). Discovering new things (36%) was the main driver here.
- 85% felt their expectations were met.
- They were particularly impressed with the infrastructure and range of options (e.g. wellness combos).
- Lack of evening entertainment (18%), poor weather (24%) and lack of daytime provisions (10%) were the main issues highlighted by this group.
- Activities most undertaken in this group were swimming (36%) and sightseeing (35%).



1. Perception of holidays in the mountains

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2. Perception of mountains

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3. Equipment

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4. Repeating holidays in the mountains

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5. Sustainability

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6. Universal values

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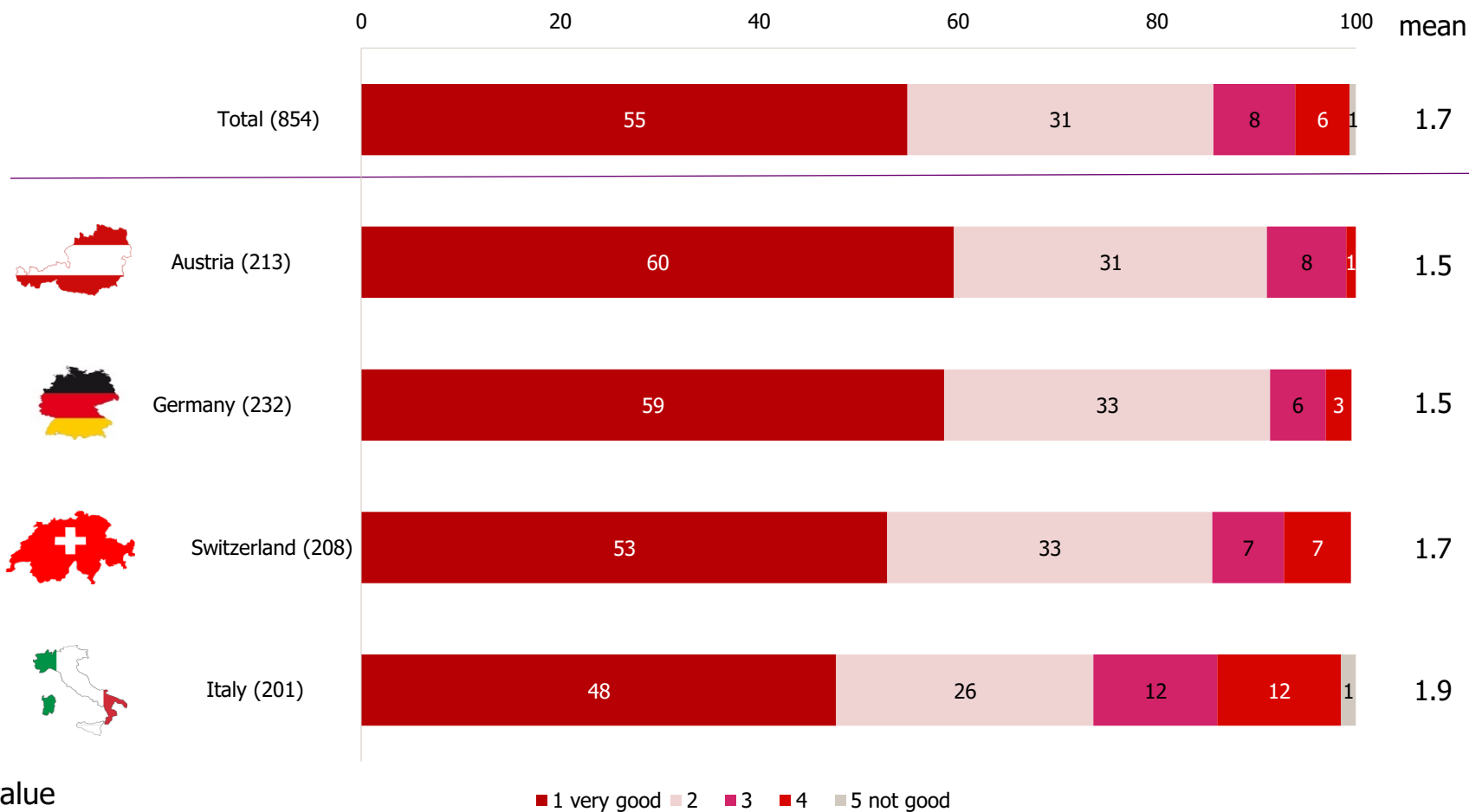
7. Target group description

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8. Conclusion

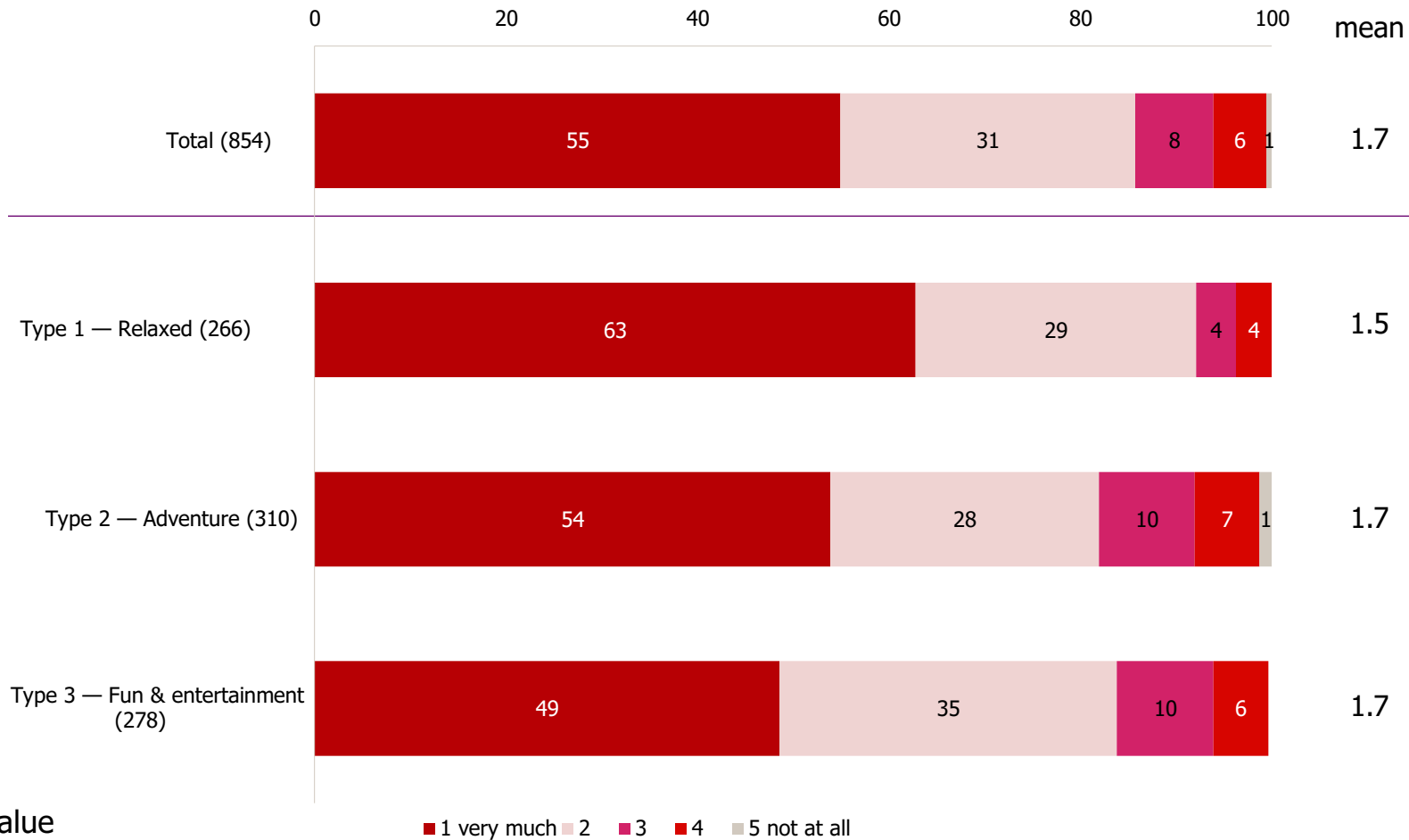
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86% of respondents enjoyed their summer holiday in the mountains. Enjoyment tended to be greatest among the Austrians and Germans.



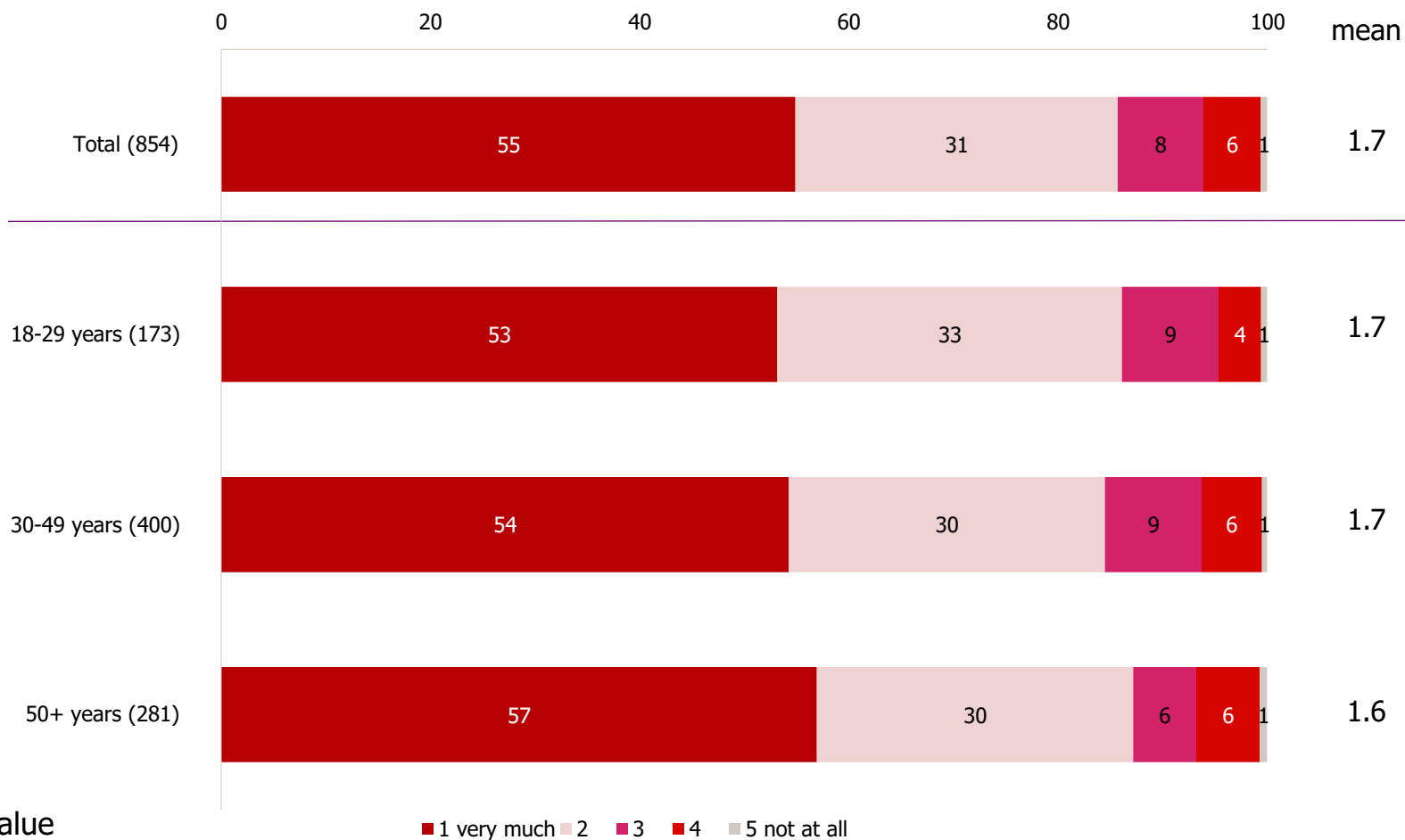
**Question 5: Overall, how much did you enjoy your last summer holiday in the mountains?**  
(Scale of 1= very much to 5= not at all)

The relaxed group tended to have the most positive perception of holidaying in the mountains



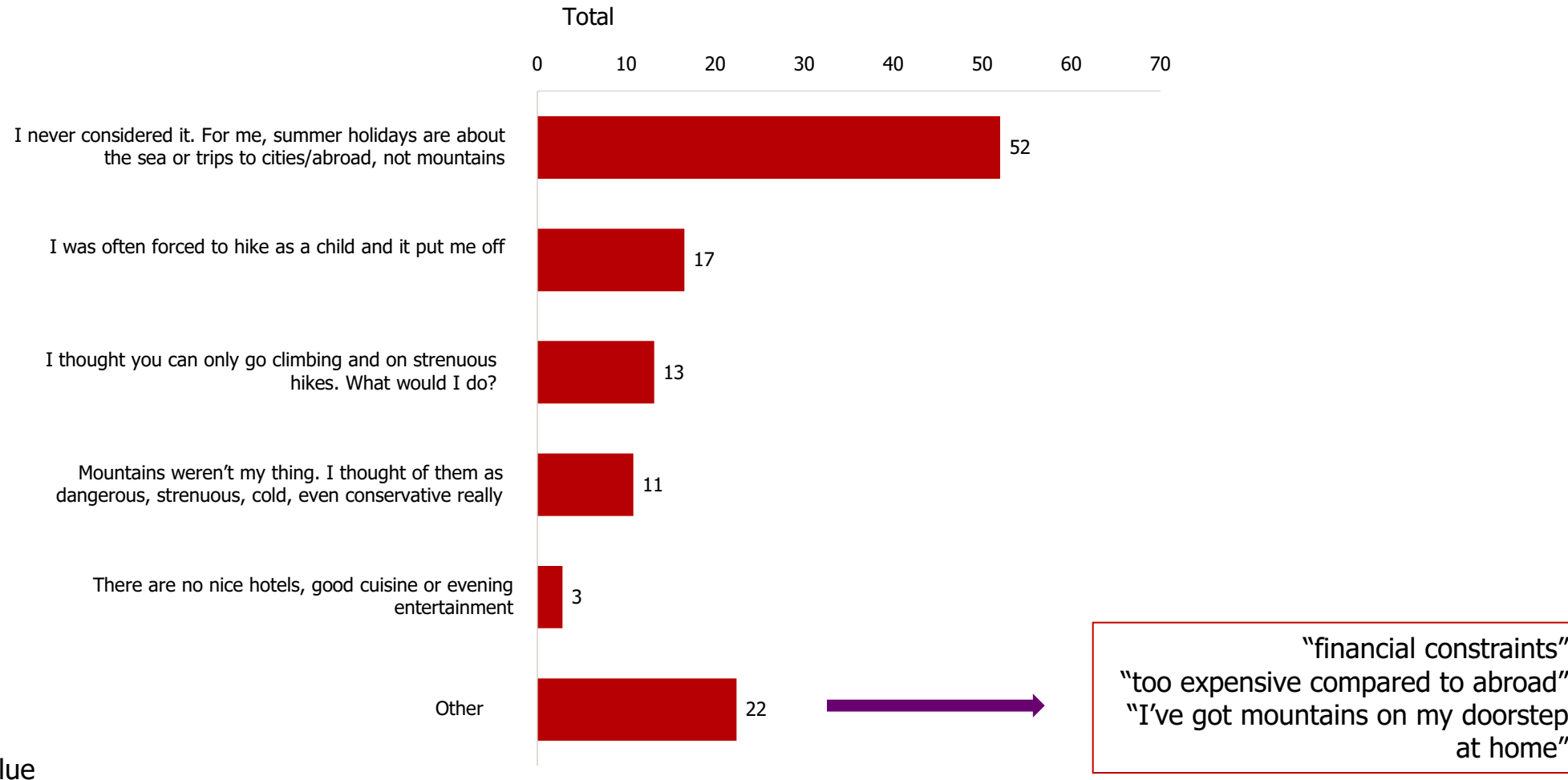
**Question 5: Overall, how much did you enjoy your last summer holiday in the mountains?**  
(Scale of 1= very much to 5= not at all)

## Enjoyment was greatest among older holidaymakers



**Question 5: Overall, how much did you enjoy your last summer holiday in the mountains?**  
(Scale of 1= very much to 5= not at all)

52% of respondents revealed that they had never spent a summer holiday in the mountains because they just hadn't considered it.



**Question 6: To date, what has stopped you from spending summer holidays in the mountains?**  
(multiple answers)

The fact that mountain holidays can be strenuous was of greater significance as a reason for not holidaying in the mountains for the Italians than for respondents from other countries. In addition, they often cited being forced to hike as a child.

No mountain holidays because...	Total	Austria	Germany	Switzerland	Italy
	(854)	(213)	(232)	(208)	(201)
I never considered it. For me, summer holidays are about the sea or trips to cities/abroad, not mountains	52	58	53	58	38
I was often forced to hike as a child and it put me off	17	12	14	19	21
I thought you can only go climbing and on strenuous hikes. What would I do?	13	14	11	10	18
Mountains weren't my thing. I thought of them as dangerous, strenuous, cold, even conservative really	11	11	9	13	10
There are no nice hotels, good cuisine or evening entertainment	3	1	2	4	3
Other	22	23	24	20	23

% value

854

**Question 6: To date, what has stopped you from spending summer holidays in the mountains?**  
(multiple answers)

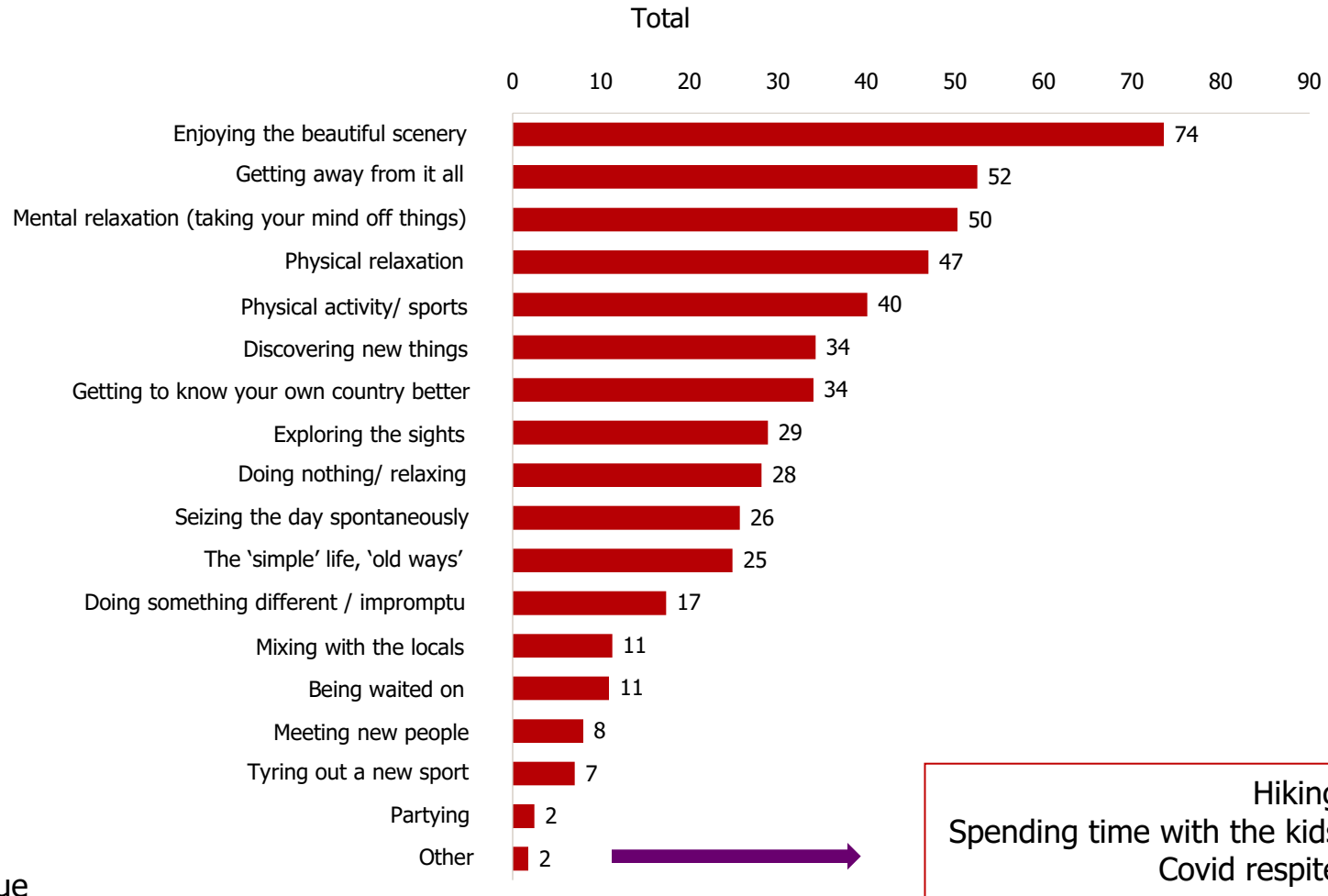
Younger respondents in particular, said that they had not considered holidaying in the mountains because they associated summer holidays with going to the sea, or visiting cities/ going abroad

No mountain holidays because...	Total	18-29 years	30-49 years	50+ years
	(854)	(281)	(400)	(173)
I never considered it. For me, summer holidays are about the sea or trips to cities/abroad, not mountains	52	62	50	49
I was often forced to hike as a child and it put me off	17	16	19	14
I thought you can only go climbing and on strenuous hikes. What would I do?	13	17	12	13
Mountains weren't my thing. I thought of them as dangerous, strenuous, cold, even conservative really	11	14	12	8
There are no nice hotels, good cuisine or evening entertainment	3	6	3	1
Other	22	14	25	24

% value

**Question 6: To date, what has stopped you from spending summer holidays in the mountains?**  
(multiple answers)

# The majority of respondents (74%) expected to enjoy the beautiful scenery on their mountain holiday



**Question 7: What were your expectations of a holiday in the mountains?**  
(multiple answers)



The relaxed group expected more physical and mental relaxation compared to other groups; the adventure group expected more physical activity; and the fun & entertainment group mostly wanted to get to know their own country better

Expectations in detail	Type 1 Relaxed	Type 2 Adventure	Type 3 Fun & entertainment
	(266)	(310)	(278)
Mental relaxation (taking your mind off things)	60	44	48
Physical relaxation	53	46	42
Physical activity/ sports	39	44	37
Getting to know your own country better	30	32	39

% value

## Holiday expectations – a country comparison

Italians were more likely to expect relaxation and least likely to be want physical activity

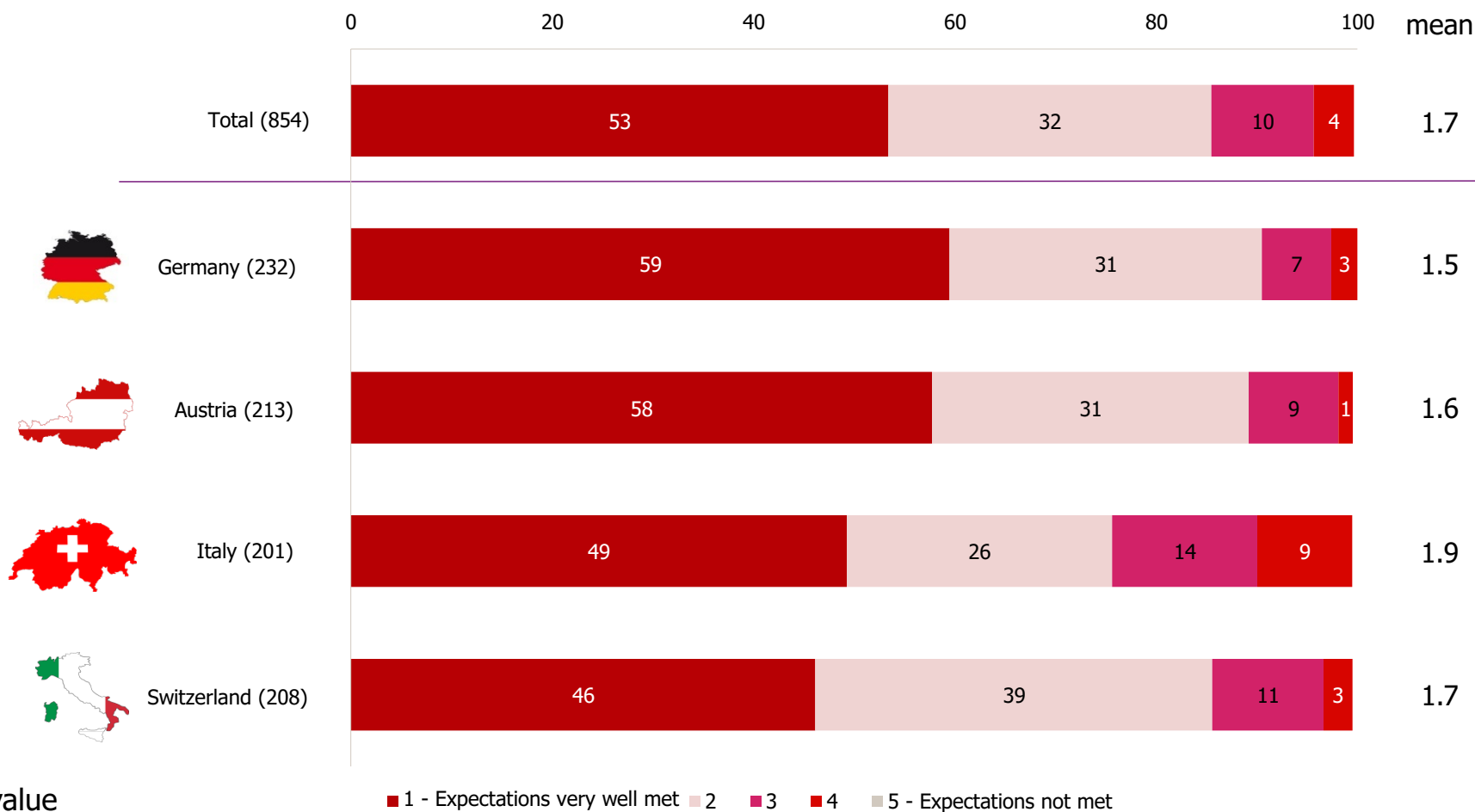
Expectations in detail	Total	Austria	Germany	Switzerland	Italy
	(854)	(213)	(232)	(208)	(201)
Enjoying the beautiful scenery	74	79	74	74	67
Getting away from it all	52	62	62	58	26
Mental relaxation (taking your mind off things)	50	48	48	48	58
Physical relaxation	47	47	45	46	50
Physical activity/ sports	40	46	40	41	33
Discovering new things	34	29	44	42	20
Getting to know your own country better	34	49	43	27	16
Exploring the sights	29	16	22	37	40
Doing nothing/ relaxing	28	26	33	28	24
Seizing the day spontaneously	26	25	26	22	29
The 'simple' life, 'old ways'	25	29	20	22	29
Doing something different/ impromptu	17	16	18	17	18
Mixing with the locals	11	11	7	13	13
Being waited on	11	12	10	10	12
Meeting new people	8	4	9	7	12
Tying out a new sport	7	8	8	6	6
Partying	2	3	1	0	5
Other	2	2	2	1	2

% value

854

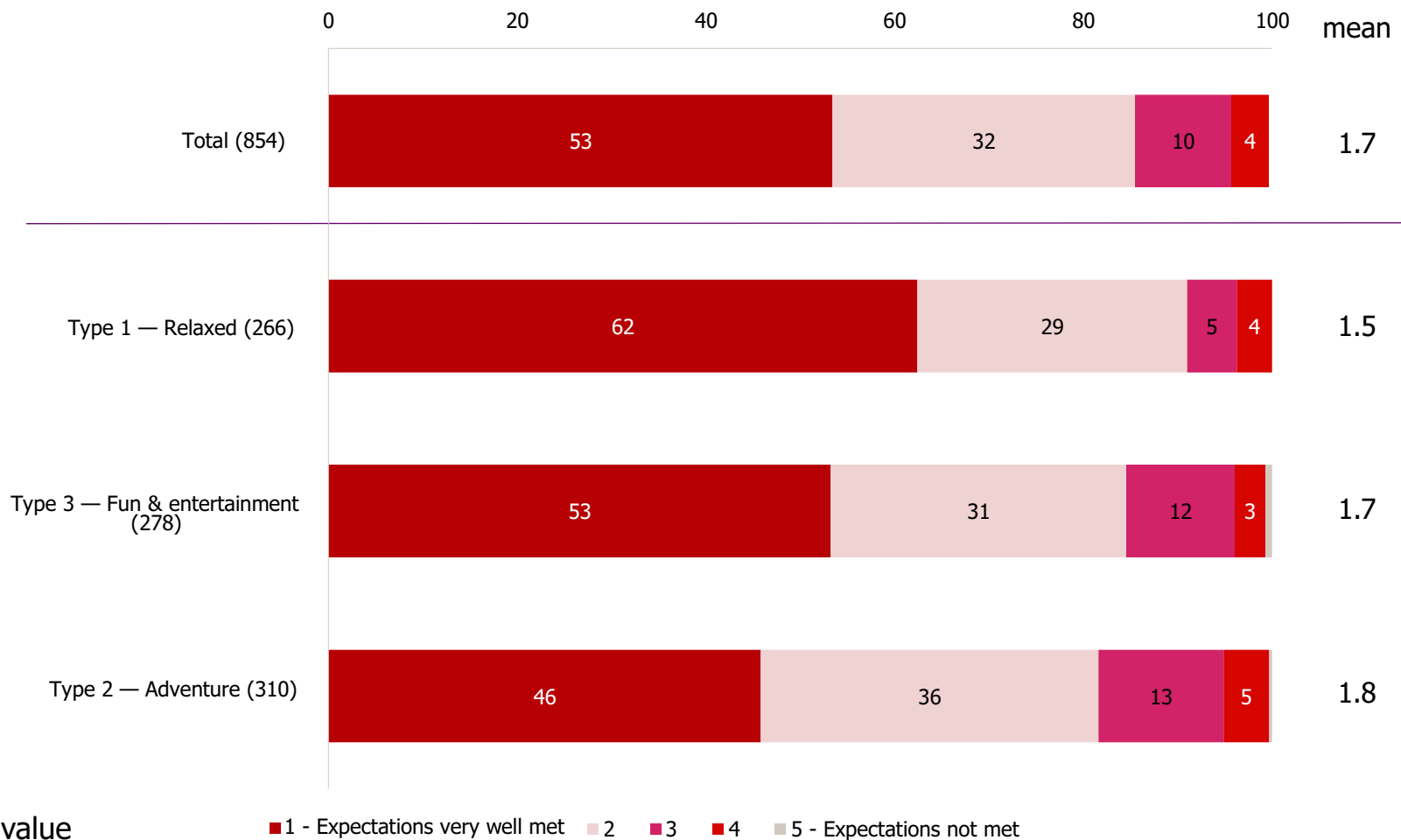
**Question 7: What were your expectations of a holiday in the mountains?**  
(multiple answers)

53% of respondents said the holiday met their expectations.  
The Germans in particular were pleased with how their expectations were met (59%)



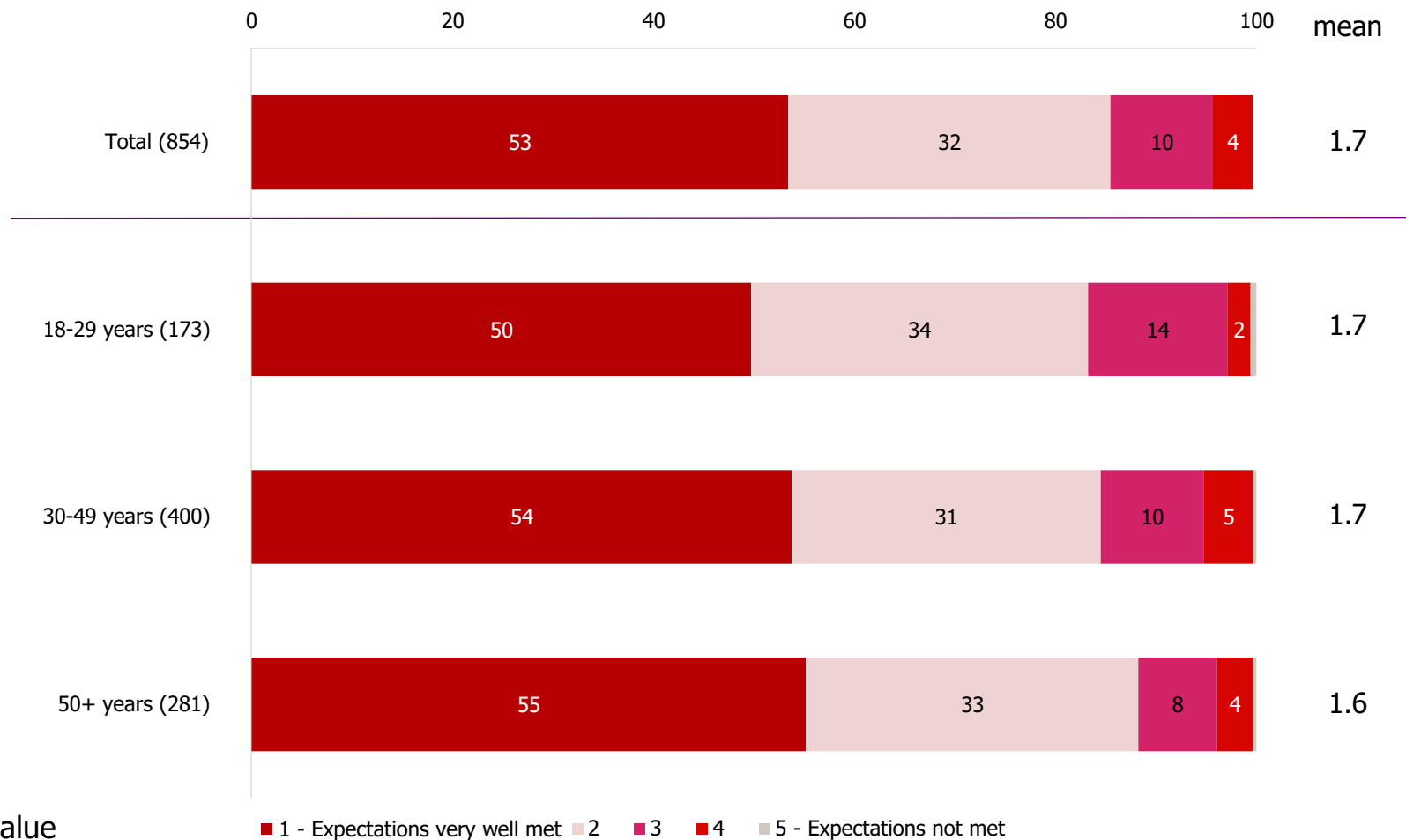
**Question 8: How well were your expectations of your holiday in the mountains met?**  
(Scale of 1= very well to 5= not at all)

The expectations of the relaxed group were met the most, and for the adventure group, the least



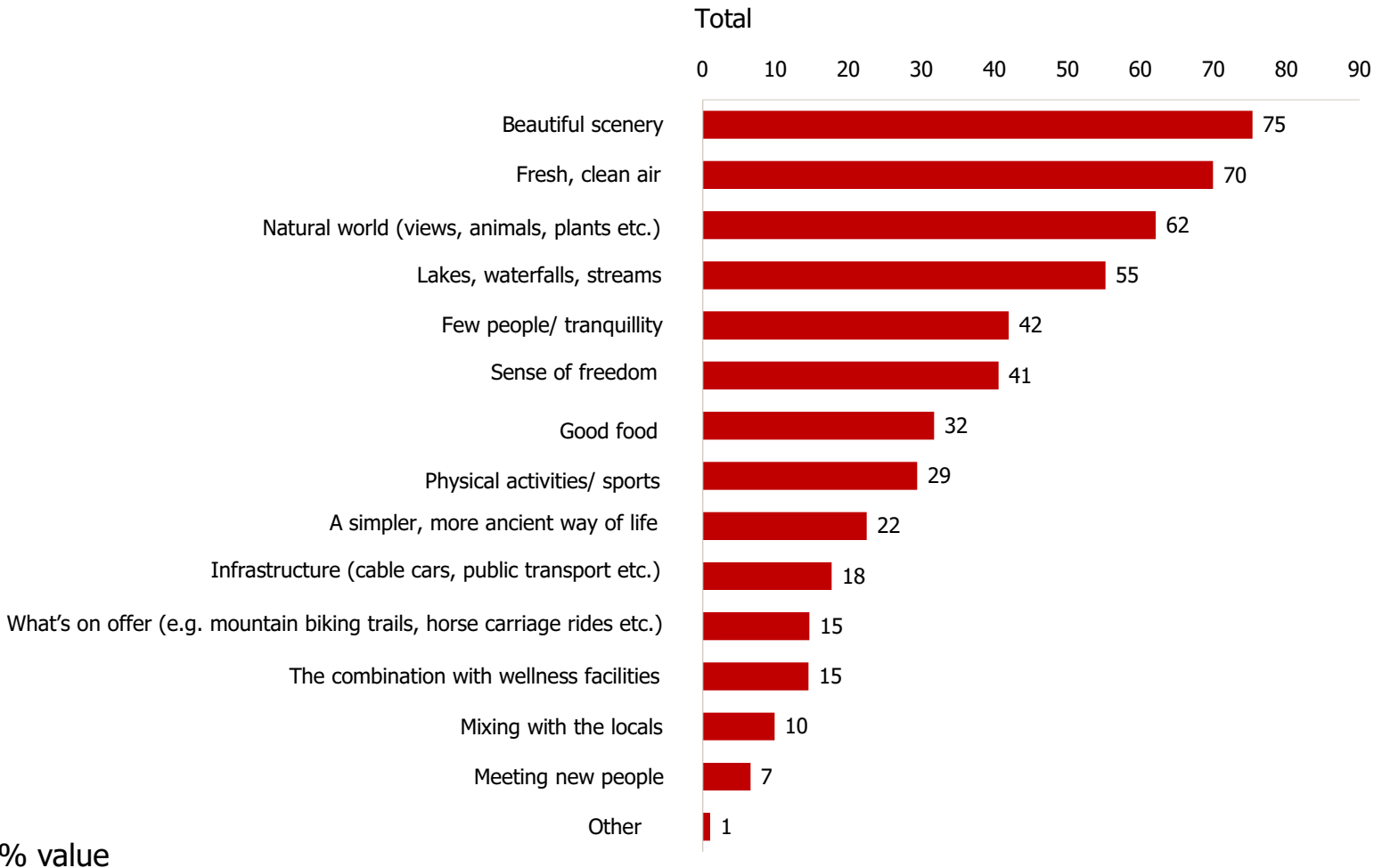
**Question 8: How well were your expectations of your holiday in the mountains met?**  
(Scale of 1= very well to 5= not at all)

## The expectations of the older holidaymakers were very well met (55%)



**Question 8: How well were your expectations of your holiday in the mountains met?**  
(Scale of 1= very well to 5= not at all)

Three quarters of respondents said that it was the beautiful landscape (75%) that impressed them the most, followed by the fresh, clean air (70%). Meeting new people was a particularly positive aspect for 7% of respondents



Positive experiences of summer holidays in the mountains – by country  
The Austrians in particular rated the scenery highly. The Swiss enjoyed the tranquillity, the Italians valued the sense of freedom and good food in particular

I particularly liked...	Total	Austria	Germany	Switzerland	Italy
	(854)	(213)	(232)	(208)	(201)
Beautiful scenery	75	80	77	79	65
Fresh, clean air	70	70	72	68	70
Natural world (views, animals, plants etc.)	62	65	64	64	55
Lakes, waterfalls, streams	55	60	56	55	49
Few people/ tranquillity	42	40	41	47	40
Sense of freedom	41	39	39	41	43
Good food	32	30	39	17	40
Physical activities/ sports	29	37	34	31	15
A simpler, more ancient way of life	22	25	22	21	21
Infrastructure (cable cars, public transport etc.)	18	15	19	19	17
What's on offer (e.g. mountain biking trails, horse carriage rides etc.)	15	14	13	9	23
The combination with wellness facilities	15	18	14	12	14
Mixing with the locals	10	9	13	6	11
Meeting new people	7	5	8	2	11
Other	1	1	0	2	0

% value

854

**Question 9: And what did you particularly enjoy about your summer holiday in the mountains?**  
(multiple answers)

The older age group particularly liked the scenery, as well as the good food, and experiencing a simpler, more ancient way of life. Younger age groups enjoyed the sense of freedom and physical activities/ sports

I particularly liked...	Total	18-29 years	30-49 years	50+ years
	(854)	(281)	(400)	(173)
Beautiful scenery	75	72	72	83
Fresh, clean air	70	66	69	73
Natural world (views, animals, plants etc.)	62	62	61	64
Lakes, waterfalls, streams	55	55	56	54
Few people/ tranquillity	42	45	41	41
Sense of freedom	41	46	41	37
Good food	32	21	32	37
Physical activities/ sports	29	40	29	24
A simpler, more ancient way of life	22	19	23	25
Infrastructure (cable cars, public transport etc.)	18	16	19	17
What's on offer (e.g. mountain biking trails, horse carriage rides etc.)	15	14	16	14
The combination with wellness facilities	15	16	14	15
Mixing with the locals	10	5	10	12
Meeting new people	7	6	6	9
Other	1	1	1	1

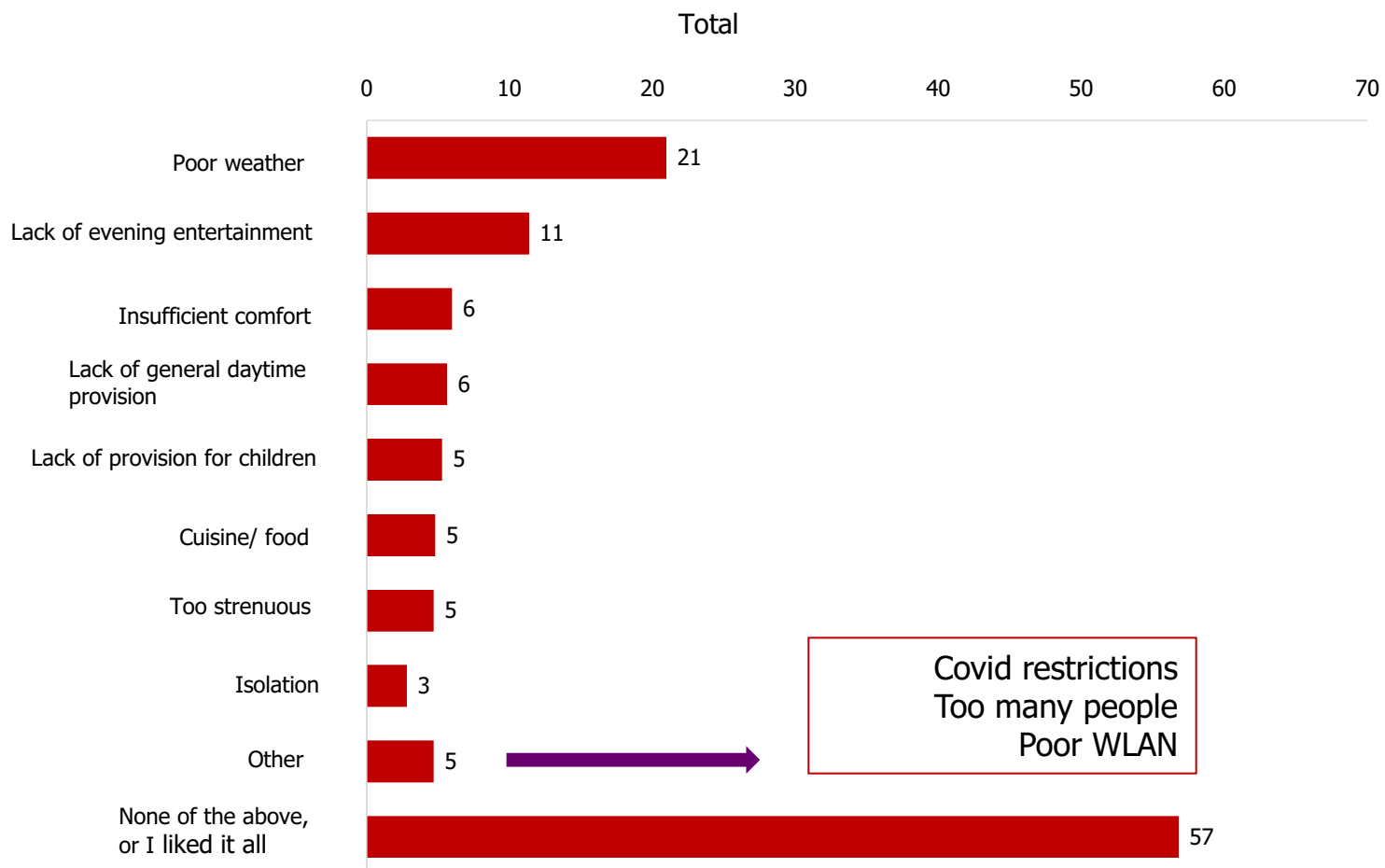
% value

854

**Question 9: And what did you particularly enjoy about your summer holiday in the mountains?**  
(multiple answers)



One fifth of respondents complained about the weather.  
57% had no complaints



Covid restrictions  
Too many people  
Poor WLAN

% value

854

**Question 10: What did you not enjoy about your summer holiday in the mountains?**  
(multiple answers)

## Things complained about on their summer holidays – by country

The Austrians complained the most about the weather, the Swiss about the lack of evening entertainment and insufficient comfort

Things not enjoyed...	Total	Austria	Germany	Switzerland	Italy
	(854)	(213)	(232)	(208)	(201)
Poor weather	21	24	16	22	23
Lack of evening entertainment	11	11	11	15	8
Insufficient comfort	6	5	5	8	6
Lack of general daytime provision	6	8	5	5	5
Lack of provision for children	5	4	6	5	6
Cuisine/ food	5	3	4	6	6
Too strenuous	5	3	5	4	7
Isolation	3	1	2	4	4
Other	5	6	3	6	3
None of the above, or I liked it all	57	56	67	48	55

% value

854

**Question 10: What did you not enjoy about your summer holiday in the mountains?**  
(multiple answers)

Things complained about on their summer holidays – by country  
The younger age groups complained about the weather the most

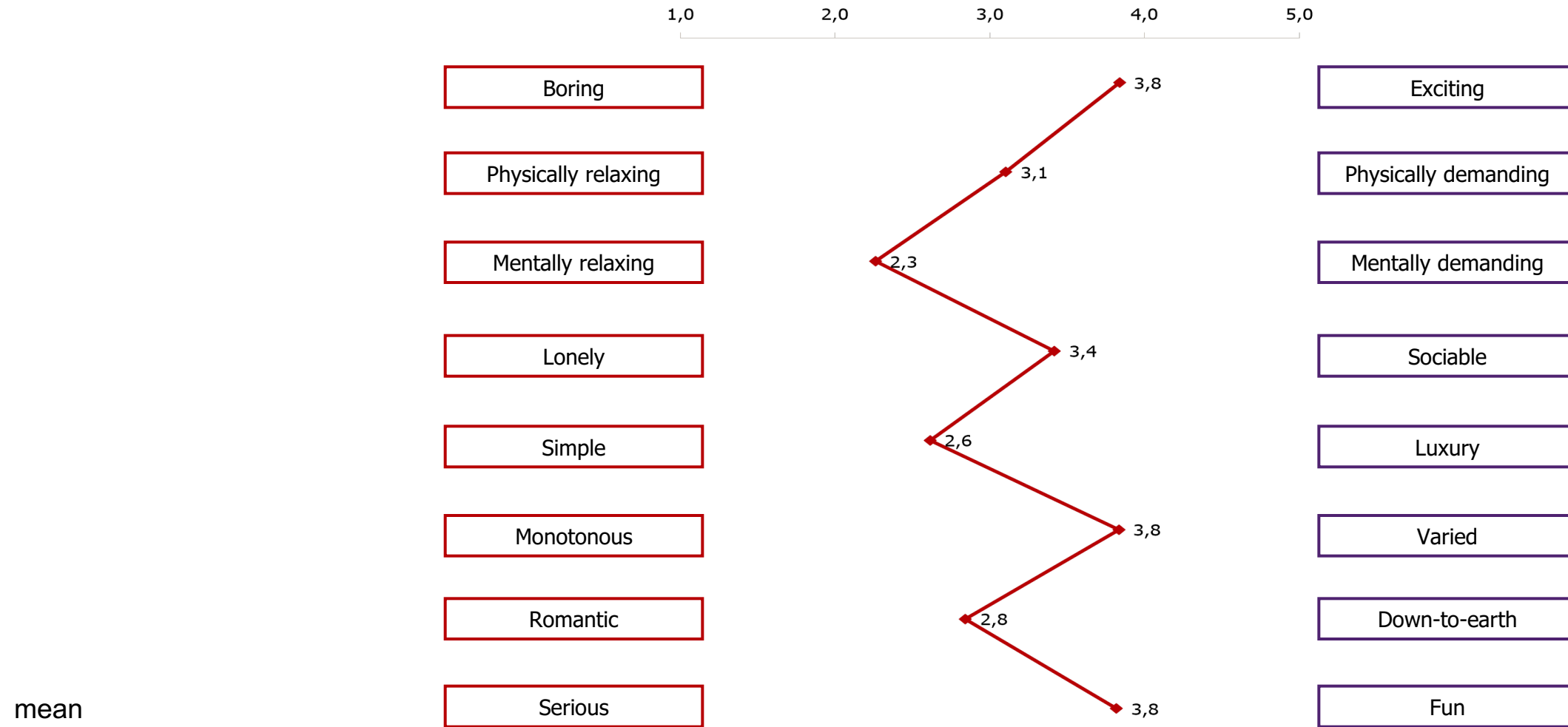
Things not enjoyed...	Total	18-29 years	30-49 years	50+ years
	(854)	(281)	(400)	(173)
Poor weather	21	26	22	16
Lack of evening entertainment	11	19	10	9
Insufficient comfort	6	8	8	3
Lack of general daytime provision	6	9	7	2
Lack of provision for children	5	5	8	2
Cuisine/ food	5	5	5	4
Too strenuous	5	8	5	3
Isolation	3	4	3	2
Other	5	3	6	4
None of the above, or I liked it all	57	45	55	68

% value

854

**Question 10: What did you not enjoy about your summer holiday in the mountains?**  
(multiple answers)

In general, their holiday in the mountains tended to be rated as exciting, but mentally relaxing, as simple, romantic, but varied and fun



**Question 11: How would you describe your holiday?**  
(on a scale somewhere between two characteristics)

1. Perception of holidays in the mountains

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2. Perception of mountains

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3. Equipment

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4. Repeating holidays in the mountains

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5. Sustainability

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6. Universal values

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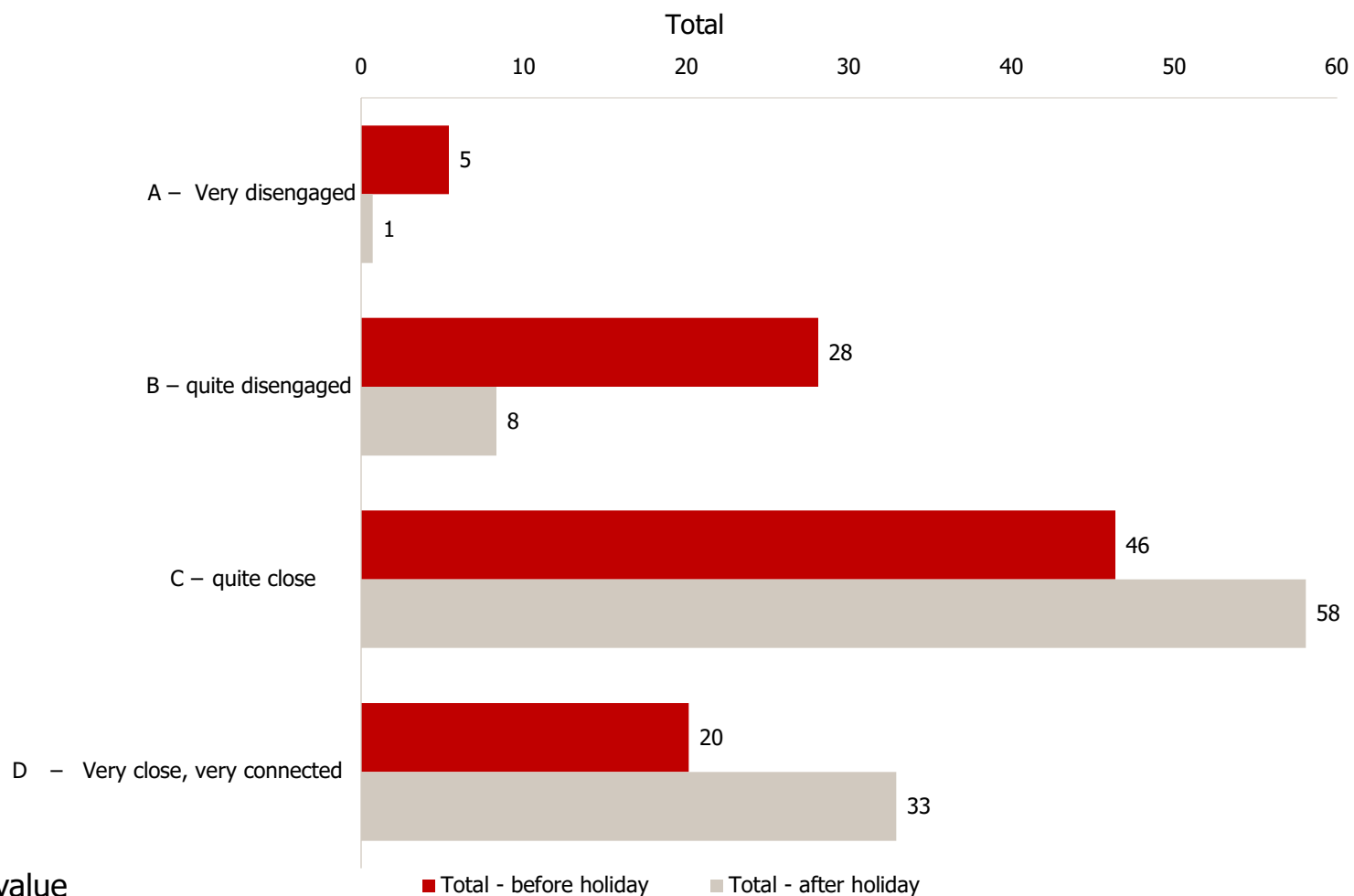
7. Target group description

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8. Conclusion

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## Connection to the mountains



**Question 12: Thinking back to your connection to the mountains before your holiday: How would you describe the connection?**  
**Question 13: And how would you describe your connection to the mountains now, after your holiday?**

## Connection to the mountains – by country

Connection to the mountains <u>before</u> holiday	Total	Austria	Germany	Switzerland	Italy
	(854)	(213)	(232)	(208)	(201)
A – very distant	5	6	5	5	6
B – quite distant	28	29	29	30	24
C – quite close	46	46	47	52	40
D – very close	20	19	19	13	29

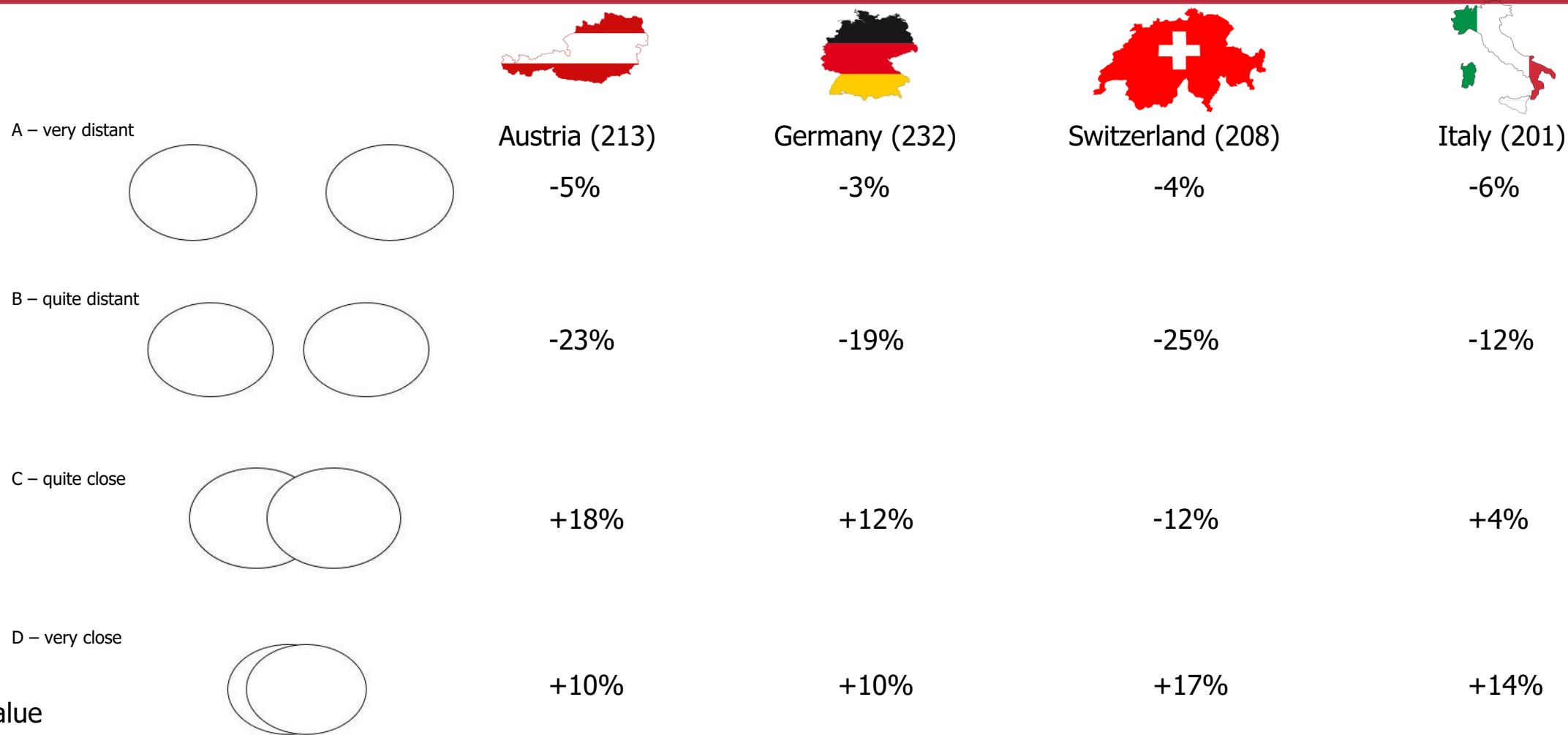
Connection to the mountains <u>after</u> holiday	Total	Austria	Germany	Switzerland	Italy
	(854)	(213)	(232)	(208)	(201)
A – very distant	1	0	2	0	0
B – quite distant	8	6	9	6	12
C – quite close	58	64	59	64	44
D – very close	33	30	30	30	43

% value

854

**Question 12: Thinking back to your connection to the mountains before your holiday: How would you describe the connection?**  
**Question 13: And how would you describe your connection to the mountains now, after your holiday?**

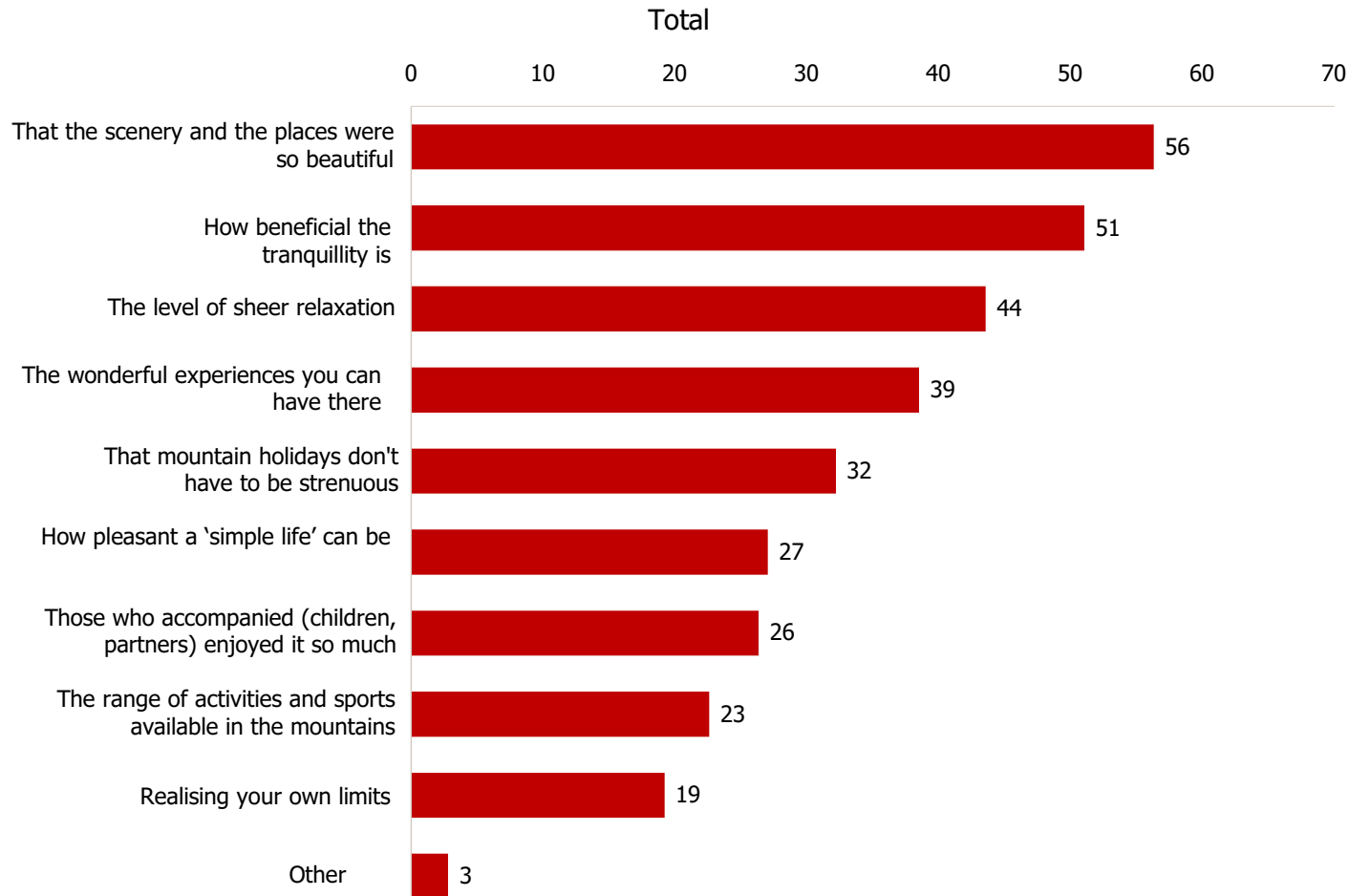
## Connection to the mountains comparison – before and after



**Question 12: Thinking back to your connection to the mountains before your holiday: How would you describe the connection?**  
**Question 13: And how would you describe your connection to the mountains now, after your holiday?**



56% of respondents were surprised by the beautiful scenery, 51% by the positive effects of the tranquillity, and 44% by the relaxation.



% value

854

**Question 14: What surprised you the most about your holiday in the mountains?**  
(multiple answers)

## Surprised about holiday – by country

What surprised me most...	Total	Austria	Germany	Switzerland	Italy
	(854)	(213)	(232)	(208)	(201)
That the scenery and the places were so beautiful	56	53	61	50	61
How beneficial the tranquillity is	51	46	53	56	49
The level of sheer relaxation	44	38	42	44	51
The wonderful experiences you can have there	39	41	44	35	33
That mountain holidays don't have to be strenuous	32	36	28	31	34
How pleasant a 'simple life' can be	27	30	22	29	28
Those who accompanied (children, partners) enjoyed it so much	26	33	24	22	26
The range of activities and sports available in the mountains	23	28	20	24	18
Realising your own limits	19	22	22	19	13
Other	3	2	3	5	1

% value

854

**Question 14: What surprised you the most about your holiday in the mountains?**  
(multiple answers)

1. Perception of holidays in the mountains

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2. Perception of mountains

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3. Equipment

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4. Repeating holidays in the mountains

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5. Sustainability

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6. Universal values

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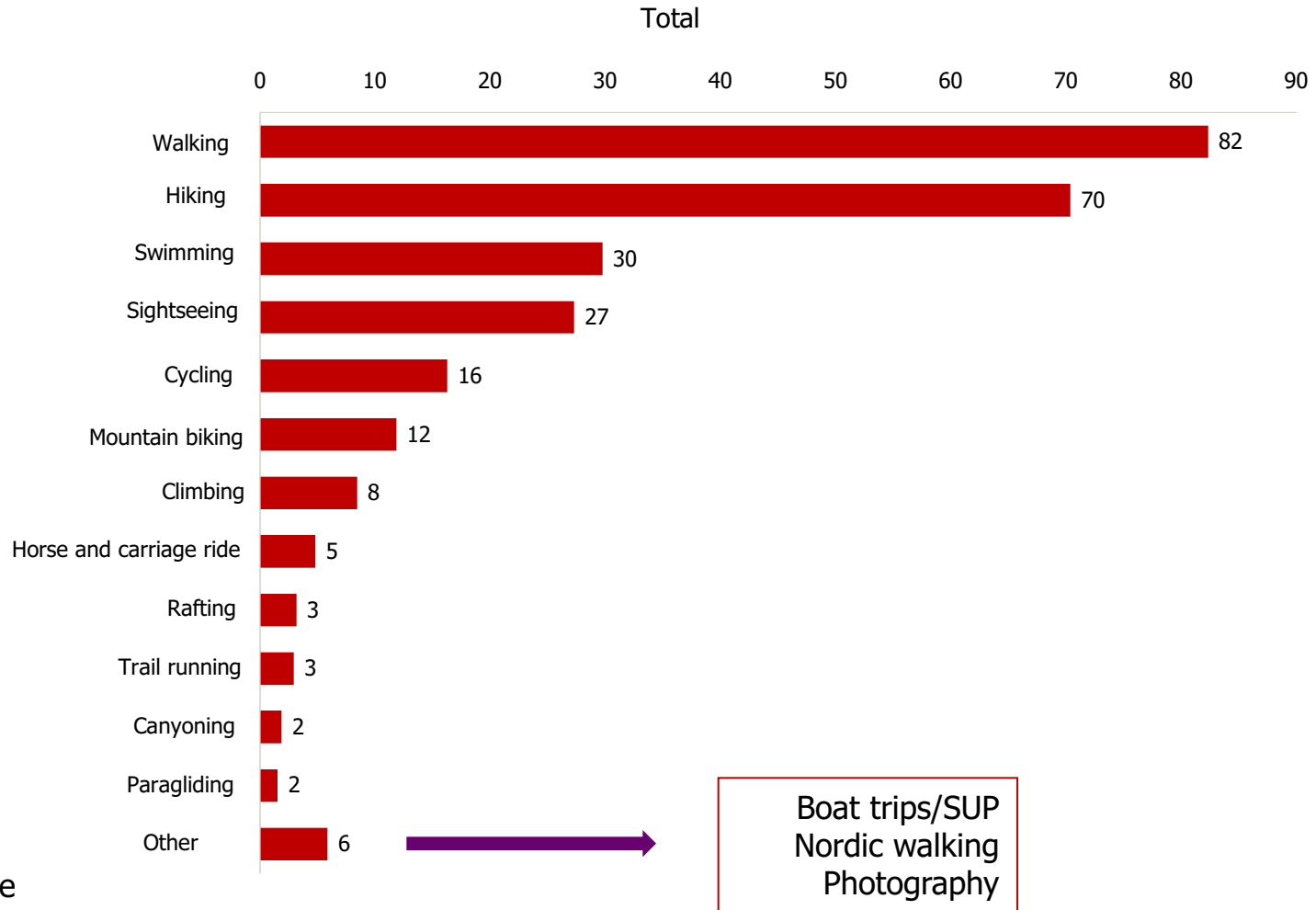
7. Target group description

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8. Conclusion

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82% of respondents went walking during their holiday, and 70% hiking. Very few went rafting, trail running, canyoning or paragliding



**Question 15: What activities did you carry out during your holiday?**  
(multiple answers)

## Activities on holiday – by country

Just 32% of Italians said they had been hiking during their holiday

Activities undertaken...	Total	Austria	Germany	Switzerland	Italy
	(854)	(213)	(232)	(208)	(201)
Walking	82	80	84	83	81
Hiking	70	85	81	79	32
Swimming	30	45	33	31	9
Sightseeing	27	33	36	28	9
Cycling	16	19	19	18	9
Mountain biking	12	11	8	12	16
Climbing	8	8	10	11	5
Horse and carriage ride	5	4	6	4	4
Rafting	3	4	1	1	6
Trail running	3	1	1	6	4
Canyoning	2	4	1	1	1
Paragliding	2	0	0	2	3
Other	6	7	3	8	5

% value

854

**Question 15: What activities did you carry out during your holiday?**  
(multiple answers)

## Activities on holiday – by personality type

The relaxed group walked and hiked the most. The adventure group tended to participate in extreme sports more, while the fun & entertainment types tended to swim and sightsee more

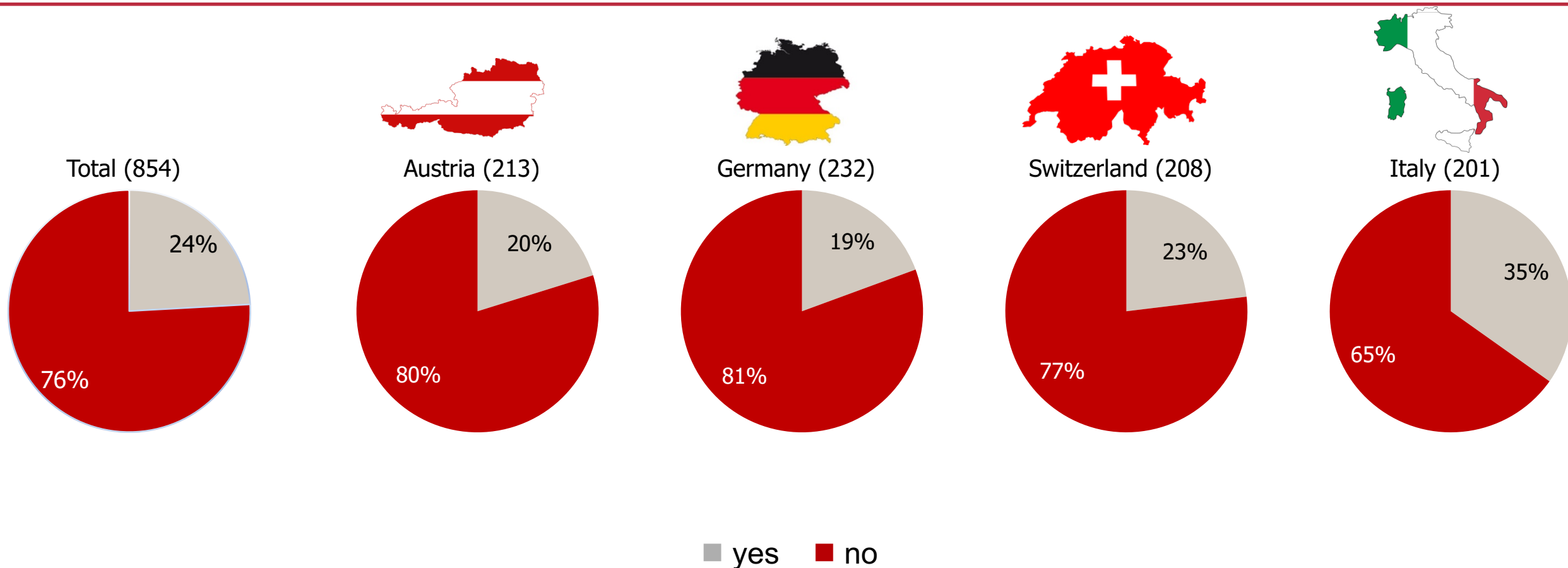
Activities undertaken...	Type 1 Relaxed	Type 2 Adventure	Type 3 Fun & entertainment
	(266)	(310)	(278)
Walking	87	78	82
Hiking	73	67	71
Swimming	27	25	38
Sightseeing	23	24	35
Cycling	13	21	14
Mountain biking	10	14	11
Climbing	5	13	7
Horse and carriage ride	3	7	4
Rafting	1	5	3
Trail running	3	3	3
Canyoning	1	3	1
Paragliding	0	3	1
Other	6	6	6

% value

854

**Question 15: What activities did you carry out during your holiday?**  
(multiple answers)

Just one quarter of respondents said they bought specific clothes/equipment for their holiday

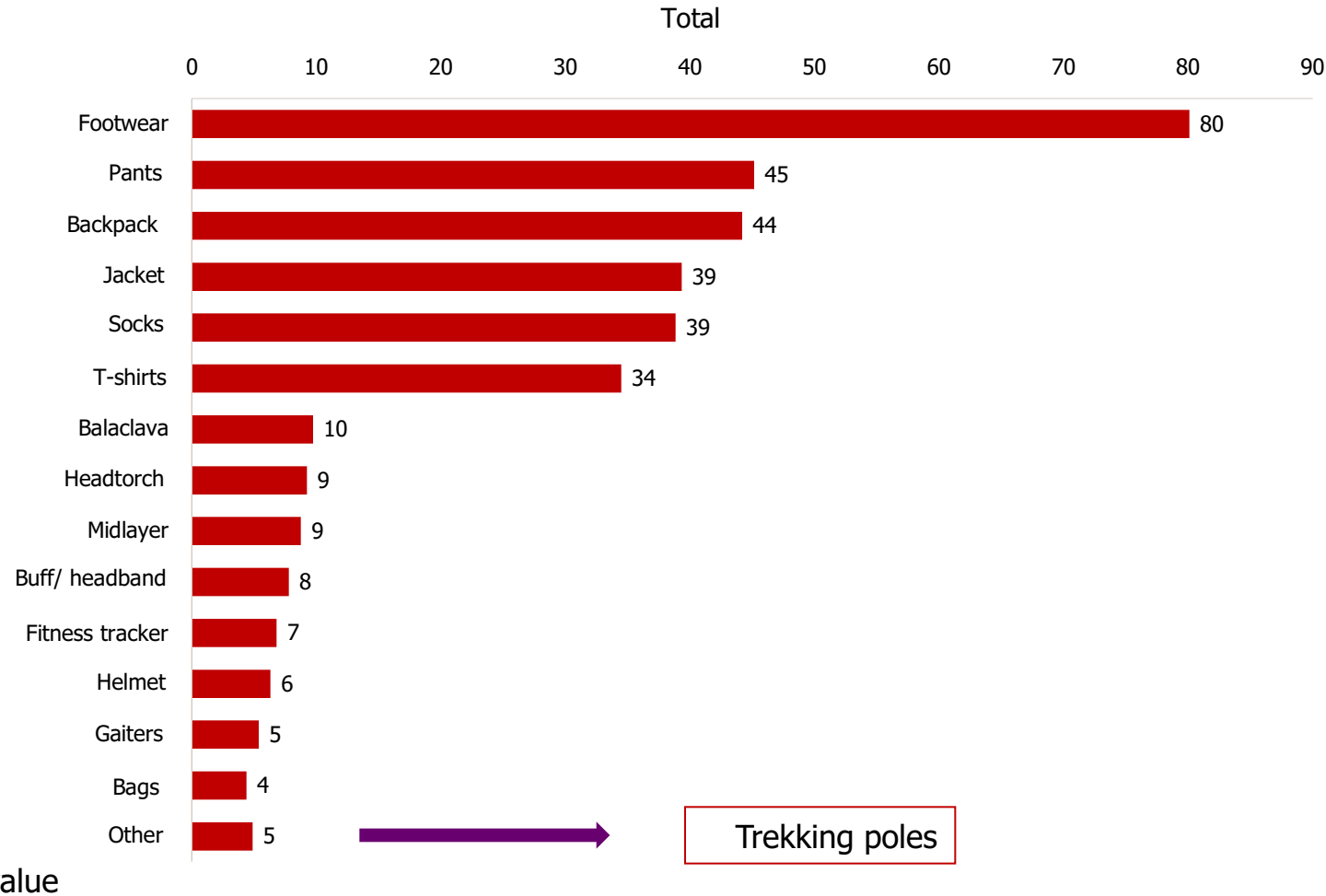


% value

854

Question 16: Did you buy specific clothing or equipment for your holiday?

## Most bought new footwear for their mountain holiday.



**Question 17: What did you buy?**  
(multiple answers)

(Based on 206 people who said they had bought new equipment / clothing for their holiday)



## Purchase of equipment/ clothing - by country

Items purchased...	Total	Austria	Germany	Switzerland	Italy
	(206)	(43)	(45)	(48)	(70)
Footwear	80	74	87	83	77
Pants	45	63	44	29	46
Backpack	44	58	40	44	39
Jacket	39	42	38	38	40
Socks	39	35	29	40	47
T-shirts	34	37	20	31	44
Balaclava	10	9	4	2	19
Headtorch	9	12	7	13	7
Midlayer	9	9	4	2	16
Buff/ headband	8	7	4	2	14
Fitness tracker	7	7	4	10	6
Helmet	6	2	9	13	3
Gaiters	5	5	4	4	7
Bags	4	7	7	4	1
Other	5	5	7	2	6

% value

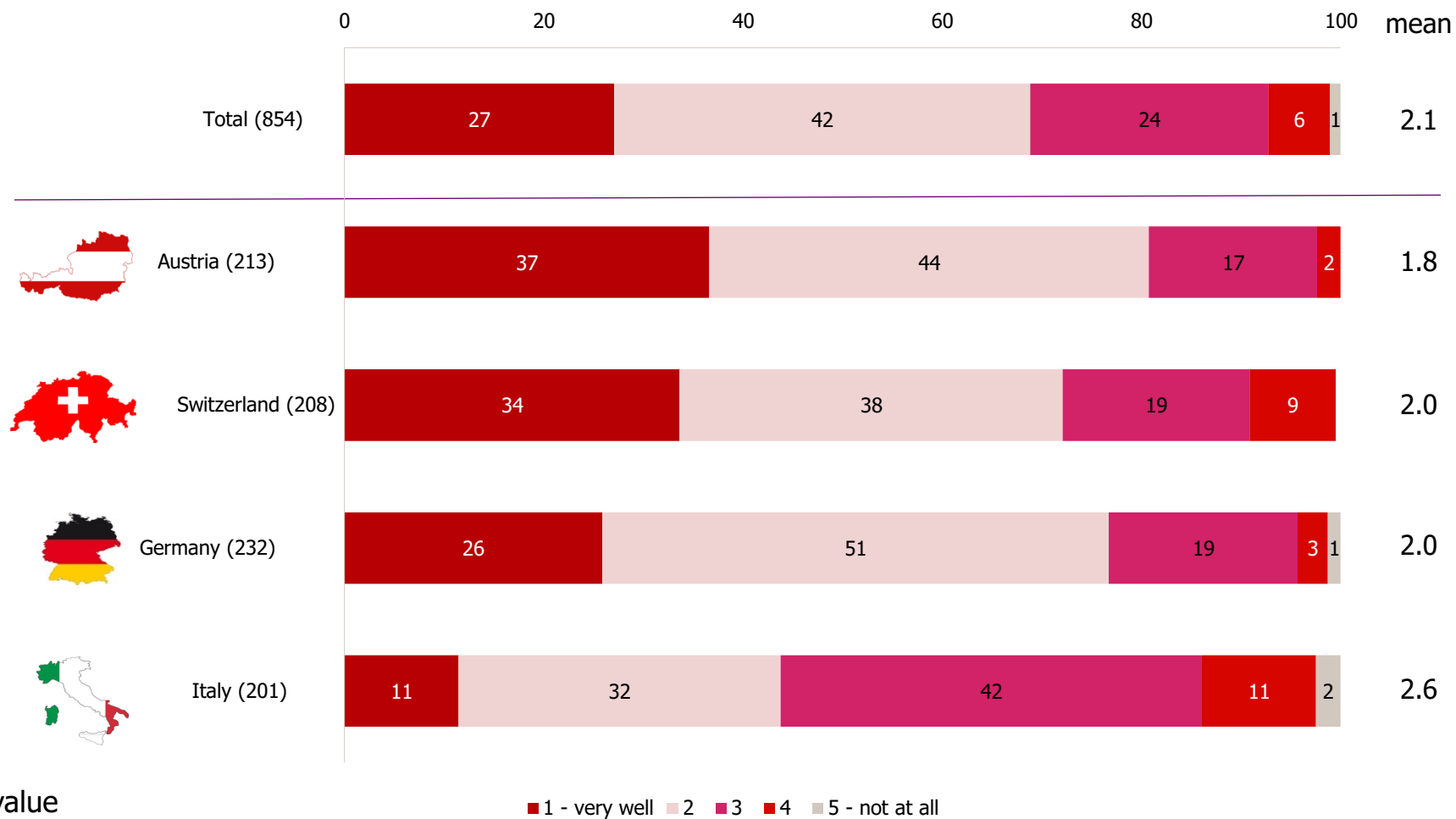
206

### Question 17: What did you buy?

(multiple answers)

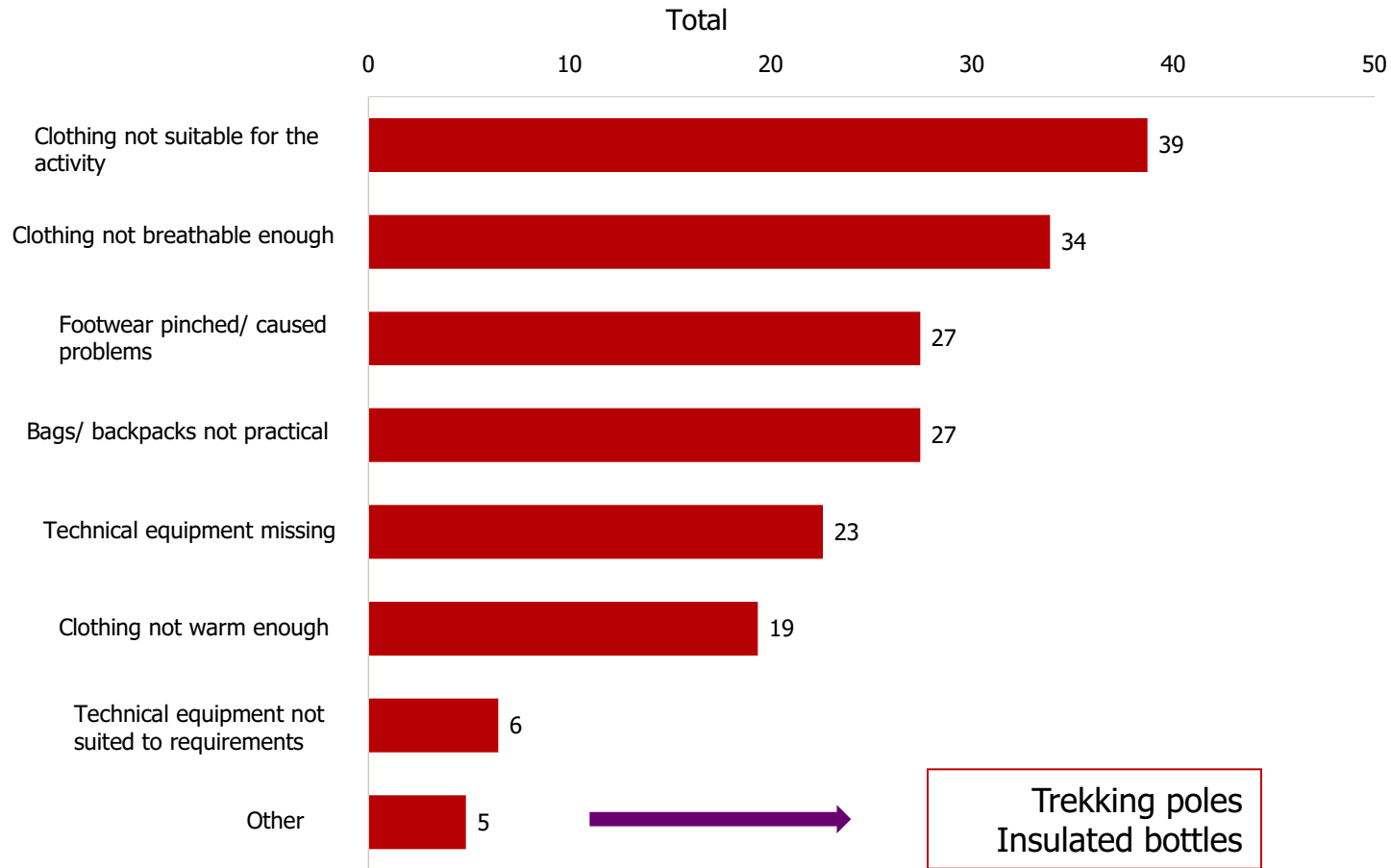
(Based on 206 people who said they had bought new equipment / clothing for their holiday)

Just 27% of respondent said they had everything they needed, with the Italians feeling the least well equipped



**Question 18: How well equipped did you feel on your holiday?**  
(Scale of 1= very well to 5= not at all)

39% said that they did not feel well equipped and admitted that their clothing was not suited to the activities they were undertaking



% value

**Question 19: What were you lacking? What problems did you have?**  
(multiple answers)

(Based on 64 people who said felt they were poorly/ not well equipped)

Lacking equipment – by country  
The Austrians felt they were lacking the most

Lacking equipment...	Total	Austria	Germany	Switzerland	Italy
	(64)	(5)	(10)	(19)	(28)
Clothing not suitable for the activity	39	60	20	21	54
Clothing not breathable enough	34	20	30	21	46
Footwear pinched/ caused problems	27	60	30	16	29
Bags/ backpacks not practical	27	40	20	26	29
Technical equipment missing	23	40	20	16	25
Clothing not warm enough	19	40	20	32	7
Technical equipment not suited to requirements	6	0	0	11	7
Other	5	20	10	5	0

% value

64

**Question 19: What were you lacking? What problems did you have?**  
(multiple answers)

(Based on 64 people who said felt they were poorly/ not well equipped)

1. Perception of holidays in the mountains

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2. Perception of mountains

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3. Equipment

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4. Repeating holidays in the mountains

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5. Sustainability

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6. Universal values

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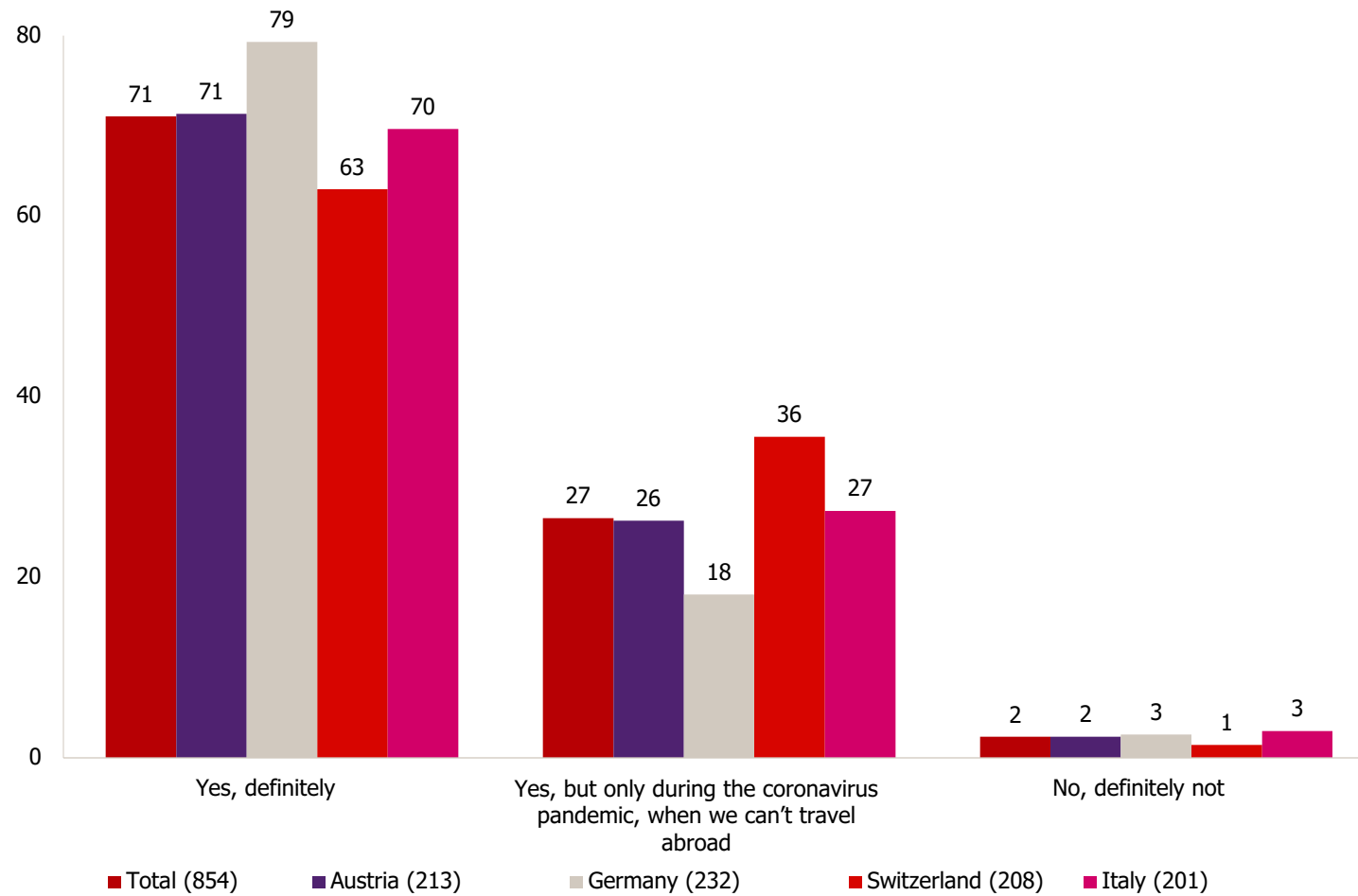
7. Target group description

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8. Conclusion

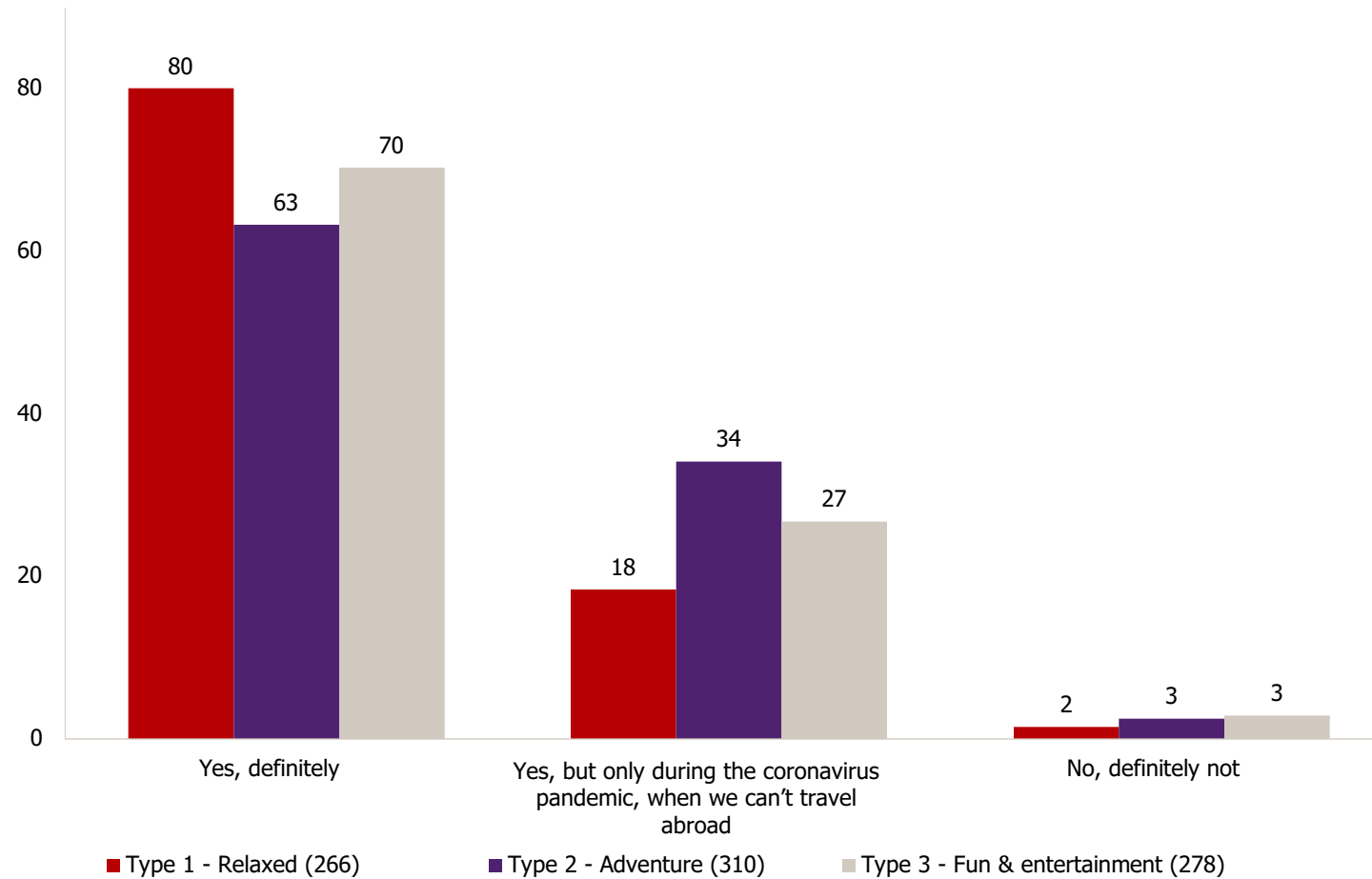
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## 71% said they would like to holiday again in the mountains



**Question 20: Given your experience: Would you spend another summer holiday in the mountains?**

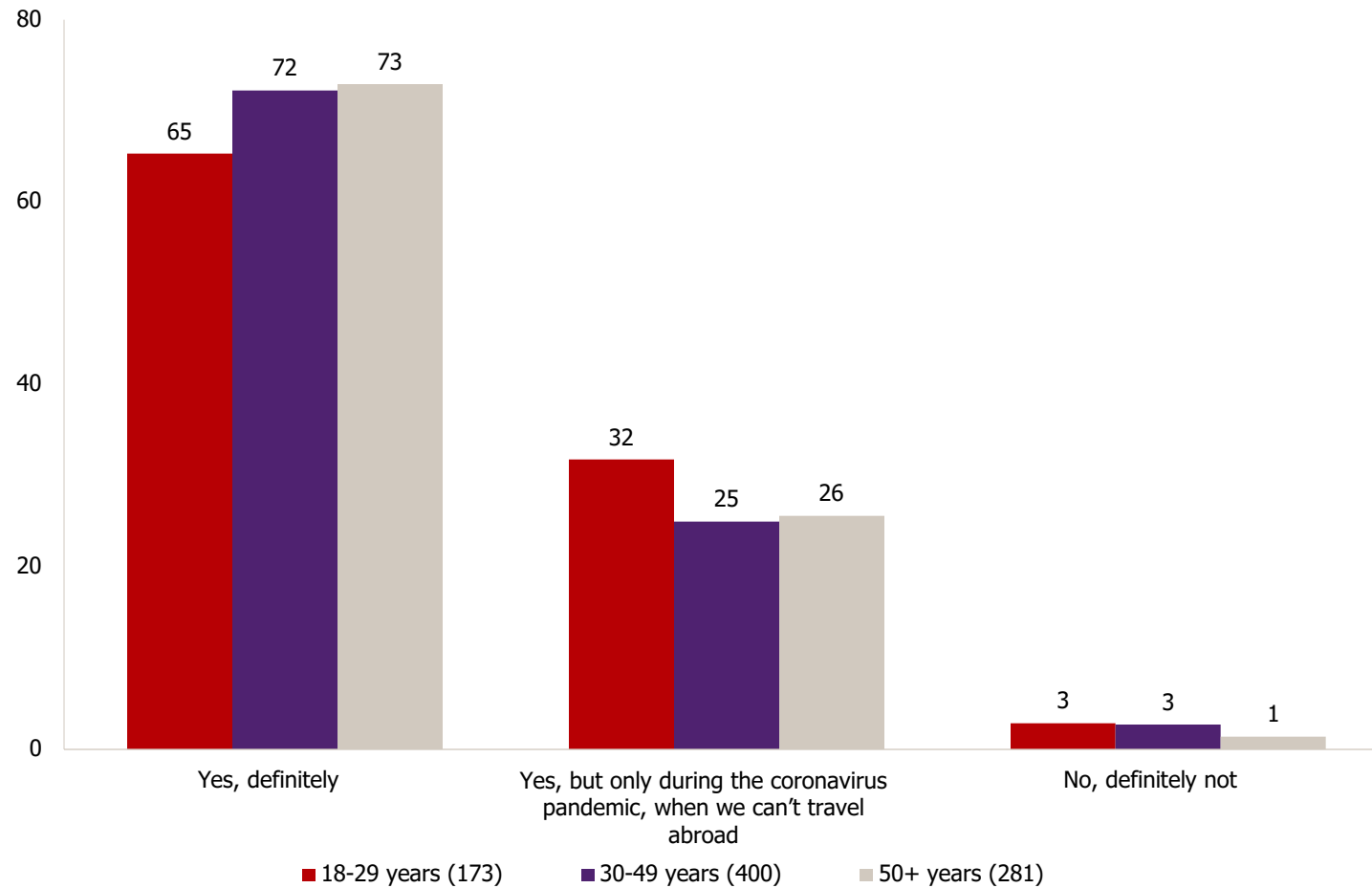
The relaxed type were most likely (80%) to repeat a holiday in the mountains



% value

**Question 20: Given your experience: Would you spend another summer holiday in the mountains?**

The over 30s were more likely than the under 30s to repeat a summer holiday in the mountains

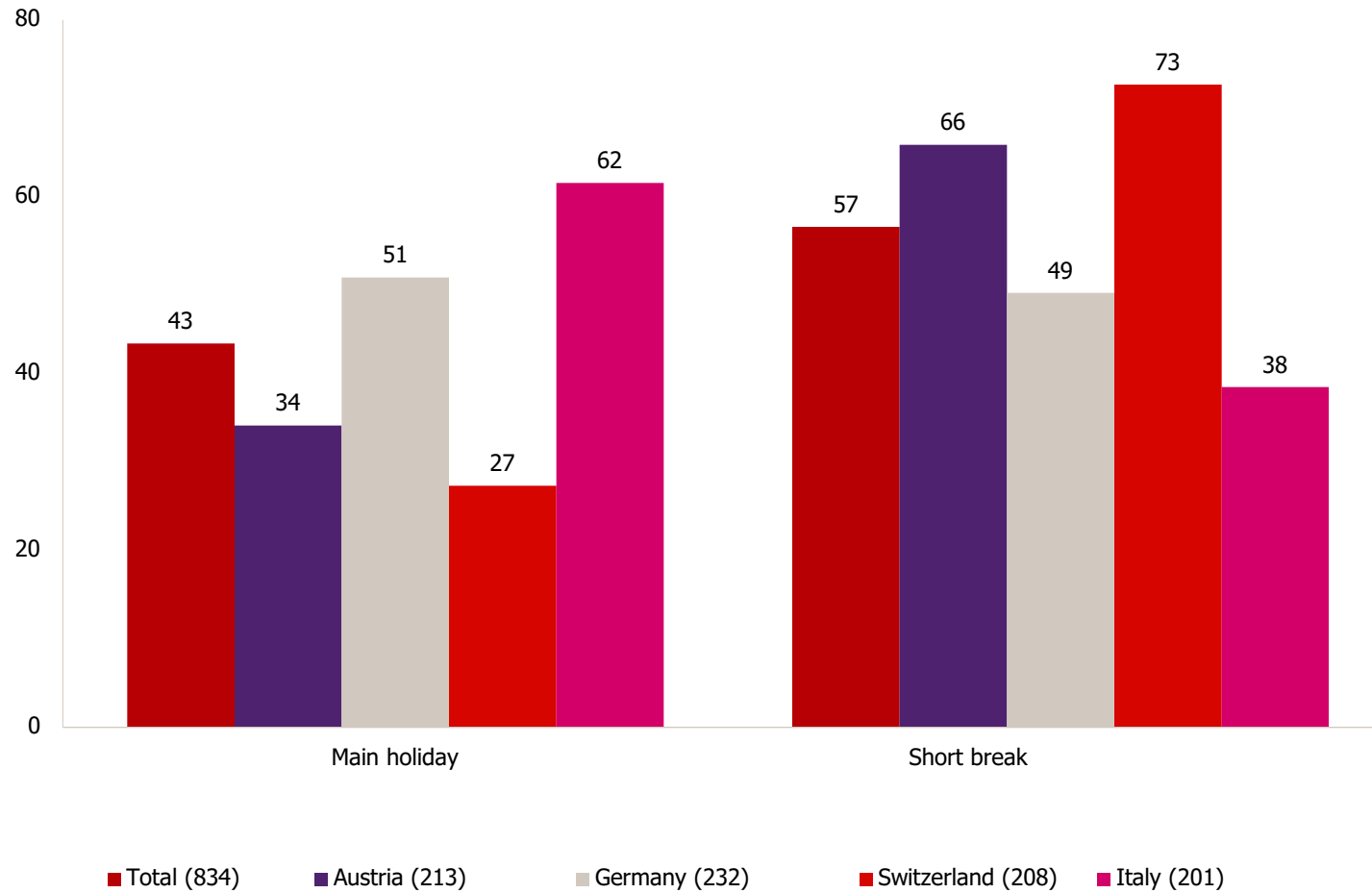


% value

**Question 20: Given your experience: Would you spend another summer holiday in the mountains?**

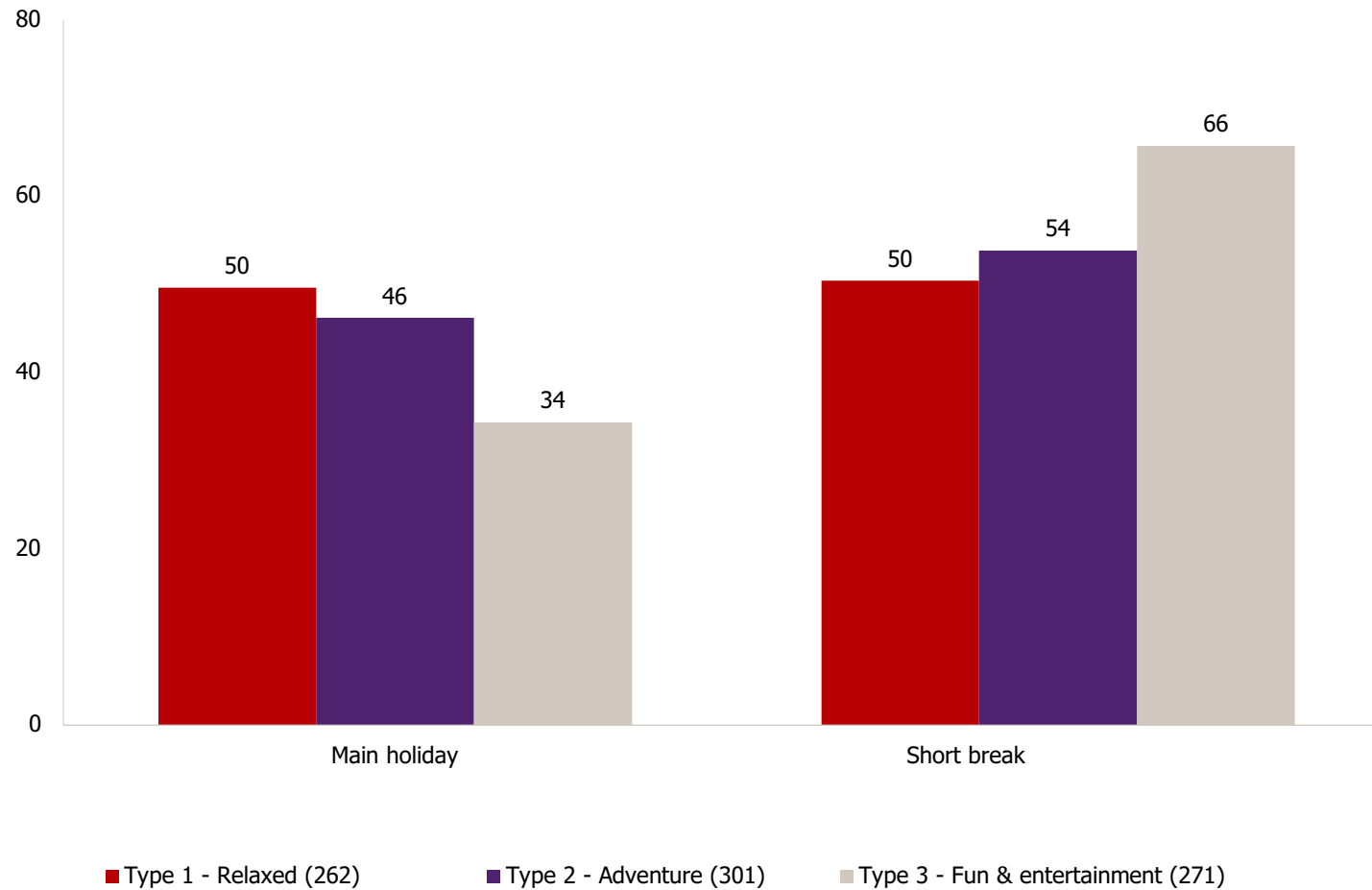


43% said they could see themselves spending their main holiday in the mountains again



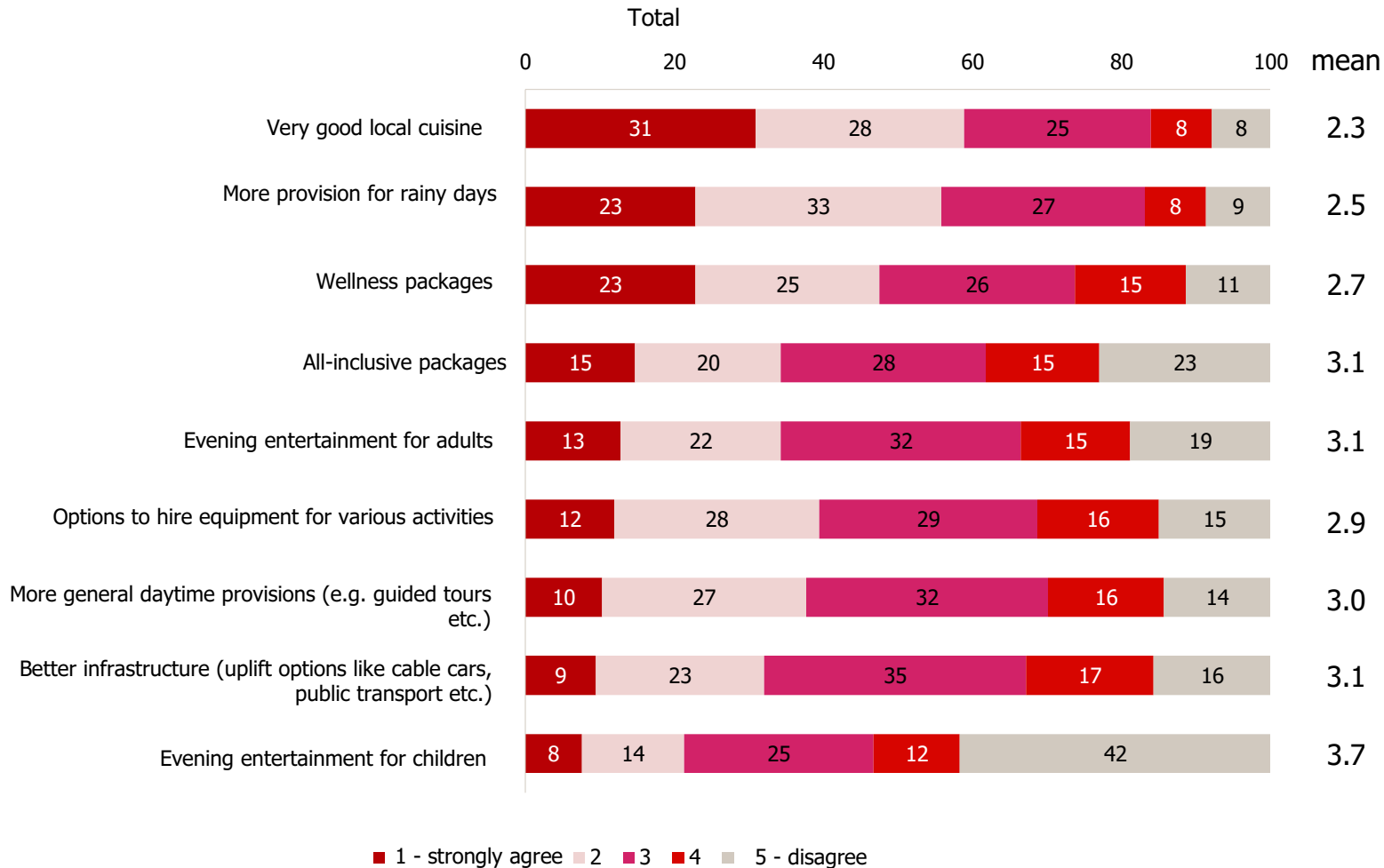
**Question 21: Would you spend your main summer holiday there, or just go on a short break?**  
(Based on 834 people who said they'd spend a summer holiday in the mountains again)

The relaxed group were most likely to imagine spending their main holiday in the mountains



**Question 21: Would you spend your main summer holiday there, or just go on a short break?**  
(Based on 834 people who said they'd spend a summer holiday in the mountains again)

## Better local cuisine and more provisions are most likely to make a mountain holiday more attractive



**Question 22: What, in your opinion, would make a summer holiday in the mountains (even) more attractive?**  
(1=strongly agree, 5=disagree)

## Making mountain holidays more attractive – by country, Top Box 1

Things that would make it more attractive...	Austria	Germany	Switzerland	Italy
	(213)	(232)	(208)	(201)
Very good local cuisine	40	31	33	19
More provisions for rainy days	26	21	17	27
Wellness packages	30	18	25	19
All-inclusive packages	15	11	14	20
Evening entertainment for adults	10	10	14	17
Options to hire equipment for various activities	12	9	13	14
More general daytime provisions (e.g. guided tours etc.)	8	8	8	19
Better infrastructure (uplift options like cable cars, public transport etc.)	9	10	7	12
Evening entertainment for children	7	7	5	12

% value

854

**Question 22: What, in your opinion, would make a summer holiday in the mountains (even) more attractive?**  
(1=strongly agree, 5=disagree)

## Making mountain holidays more attractive – by type, Top Box 1

Things that would make it more attractive...	Type 1 Relaxed	Type 2 Adventure	Type 3 Fun & entertainment
	(266)	(310)	(278)
Very good local cuisine	34	32	27
More provisions for rainy days	23	22	24
Wellness packages	21	22	26
All-inclusive packages	14	14	17
Evening entertainment for adults	7	16	15
Options to hire equipment for various activities	12	15	8
More general daytime provisions (e.g. guided tours etc.)	6	15	8
Better infrastructure (uplift options like cable cars, public transport etc.)	8	12	8
Evening entertainment for children	5	10	7

% value

854

**Question 22: What, in your opinion, would make a summer holiday in the mountains (even) more attractive?**  
(1=strongly agree, 5=disagree)

1. Perception of holidays in the mountains

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2. Perception of mountains

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3. Equipment

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4. Repeating holidays in the mountains

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**5. Sustainability**

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6. Universal values

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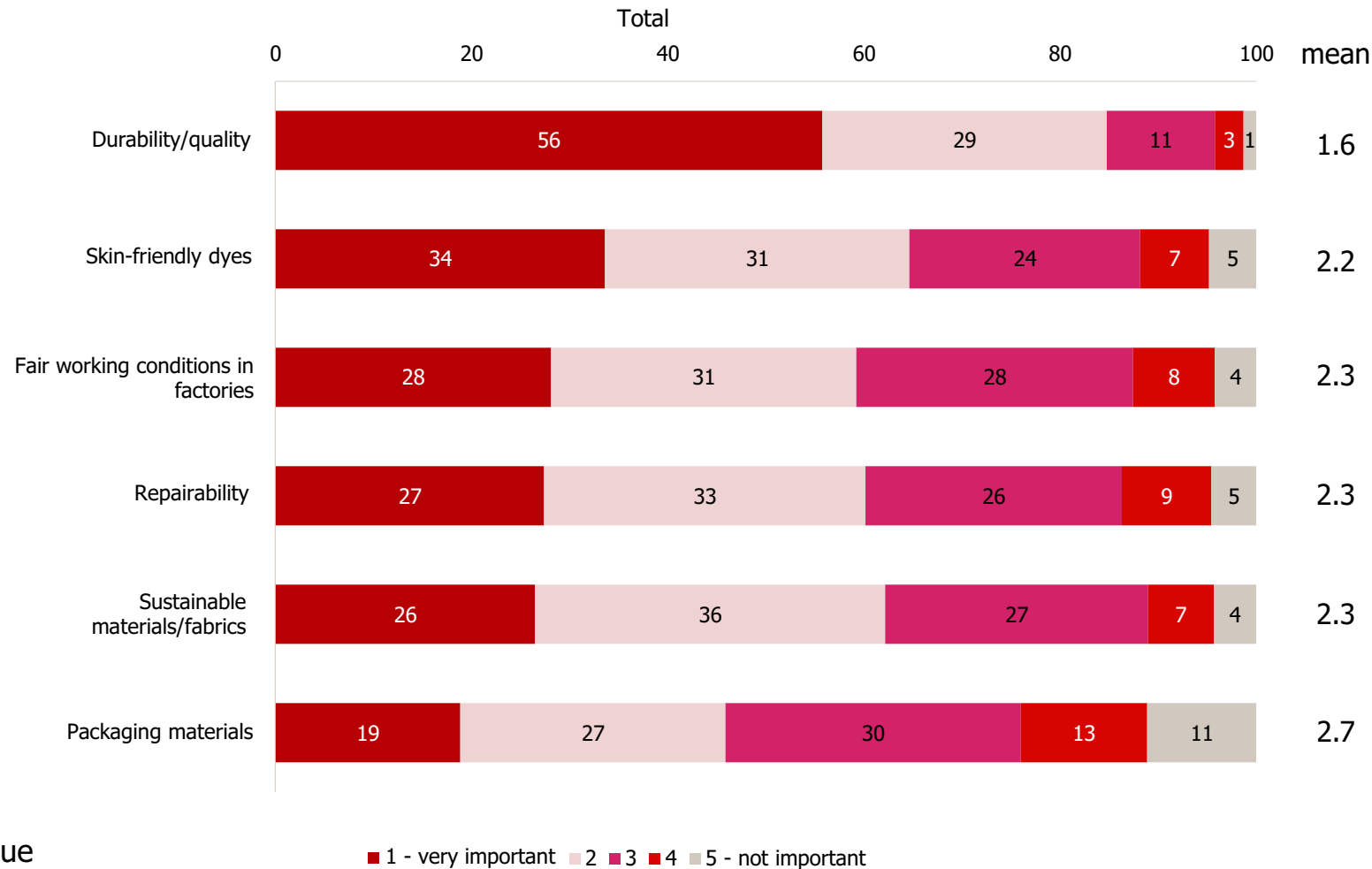
7. Target group description

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8. Conclusion

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When it comes to the sustainability aspect of buying apparel and footwear, durability/quality was the most significant factor for 85% of respondents. Packaging materials were the least important factor (46%)



**Question 23: How important to you are the following sustainability aspects when buying apparel and footwear?**  
(1=very important, 5=not at all important)

Sustainability – by country, Top Box 1

Austrians tended to place the greatest importance on individual criteria relating to sustainability

Sustainability is important for...	Austria	Germany	Switzerland	Italy
	(213)	(232)	(208)	(201)
Durability/quality	65	59	53	45
Skin-friendly dyes	45	38	31	19
Fair working conditions in factories	36	21	32	24
Repairability	34	23	25	28
Sustainable materials/fabrics	30	25	25	25
Packaging materials	22	17	19	17

% value

854

**Question 23: How important to you are the following sustainability aspects when buying apparel and footwear?**  
(1=very important, 5=not at all important)



1. Perception of holidays in the mountains

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2. Perception of mountains

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3. Equipment

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4. Repeating holidays in the mountains

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5. Sustainability

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6. Universal values

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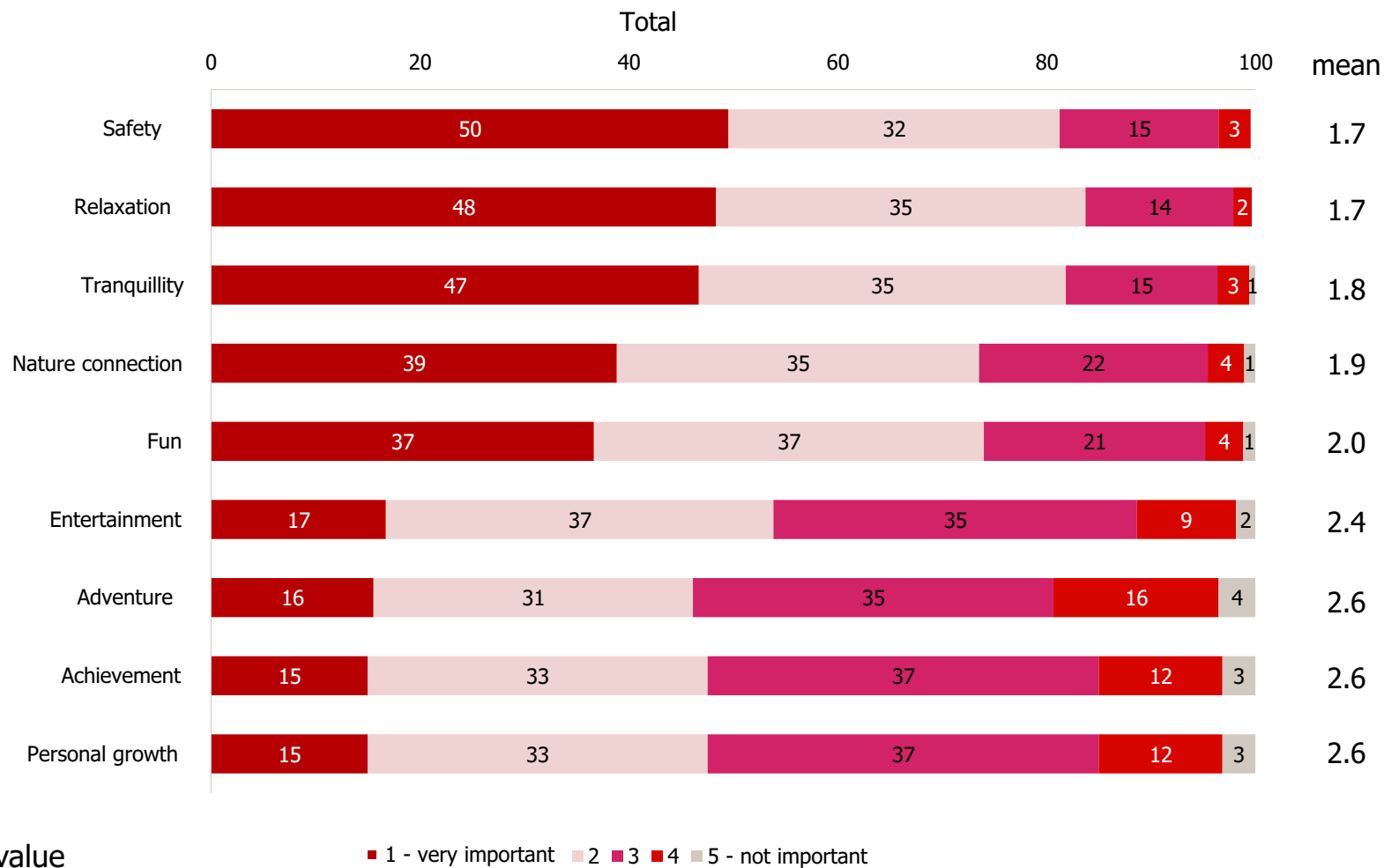
7. Target group description

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8. Conclusion

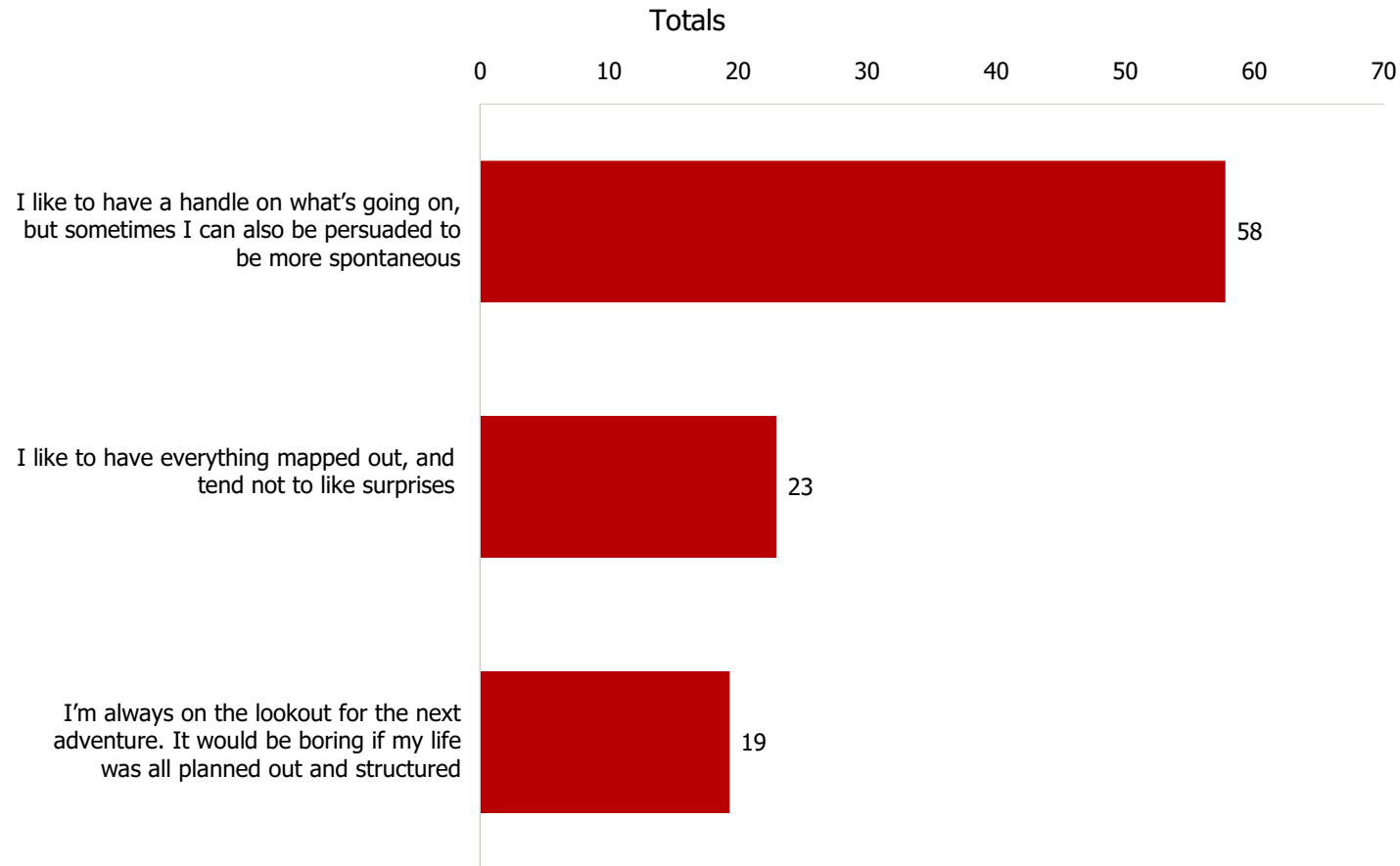
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# Values



**Question 24: How important are the following in your life?**  
(1=very important, 5=not at all important)

## Self-evaluation

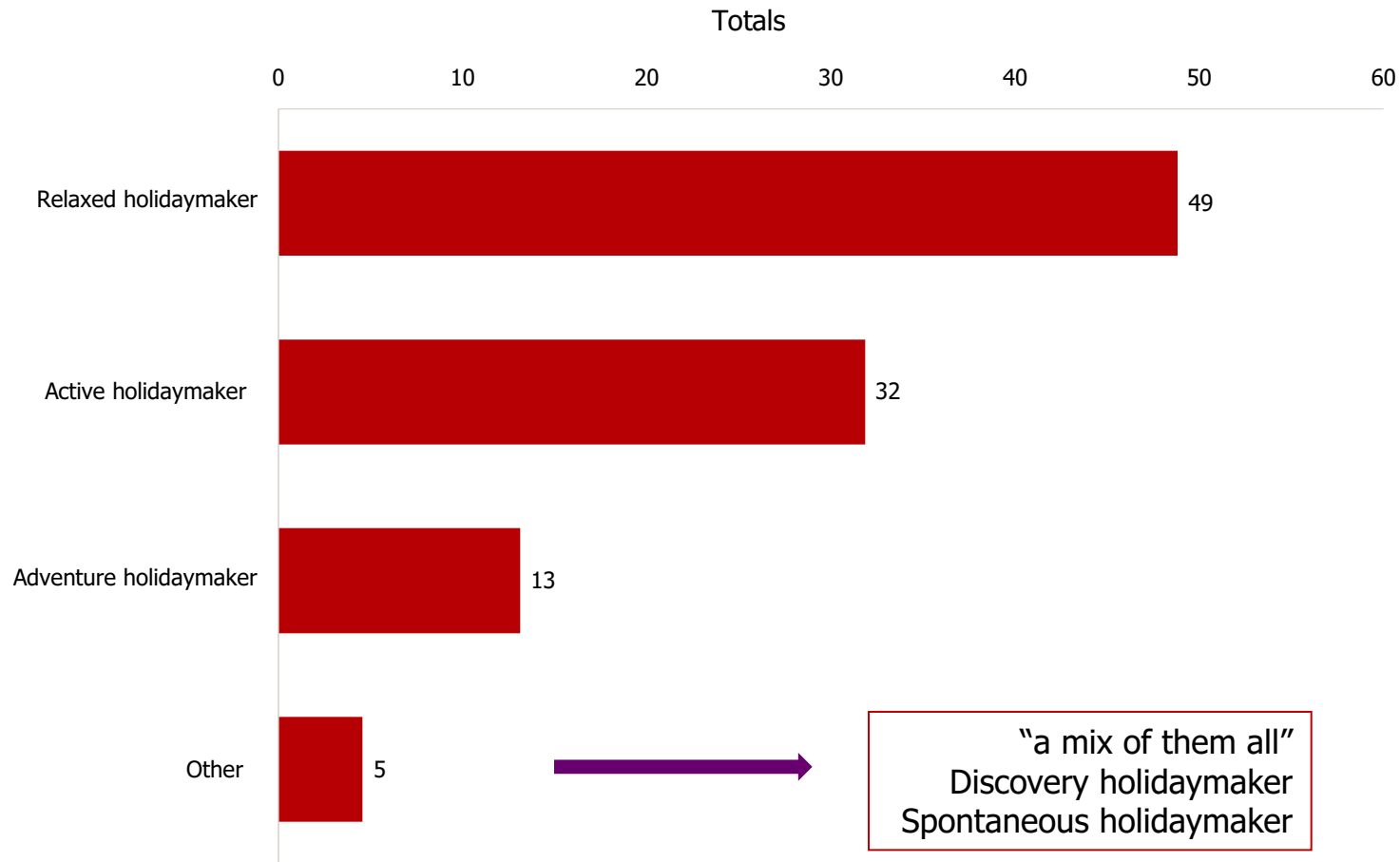


% value

854

**Question 25: How would you describe yourself? Which of the following statements is most applicable?**

# Holiday types

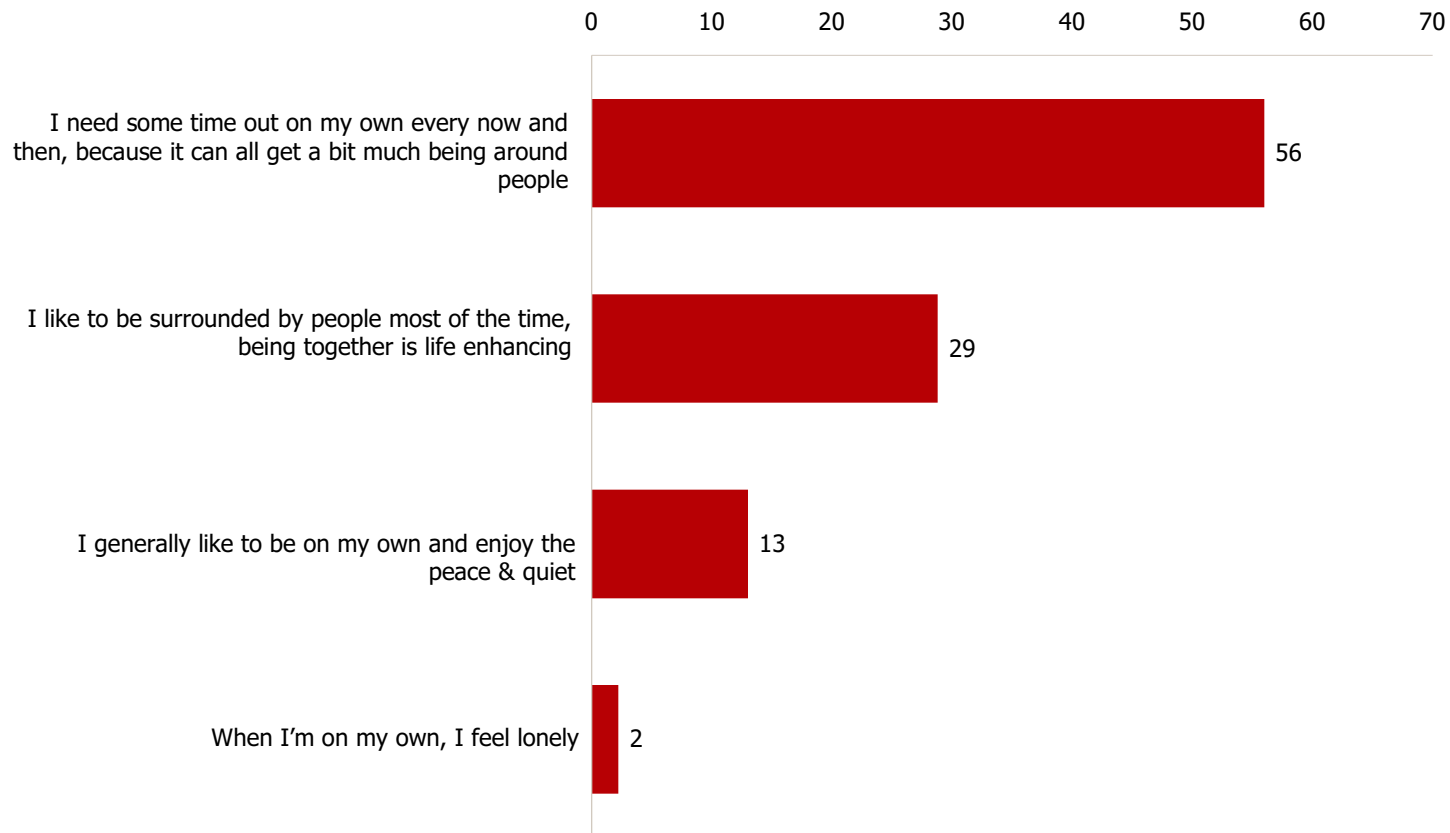


% value

Question 26: What kind of holidaymaker do you associate yourself with?

## Time alone or in company

Totals



% value

854

**Question 27: Which of the following statements is most applicable?**

1. Perception of holidays in the mountains

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2. Perception of mountains

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3. Equipment

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4. Repeating holidays in the mountains

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5. Sustainability

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6. Universal values

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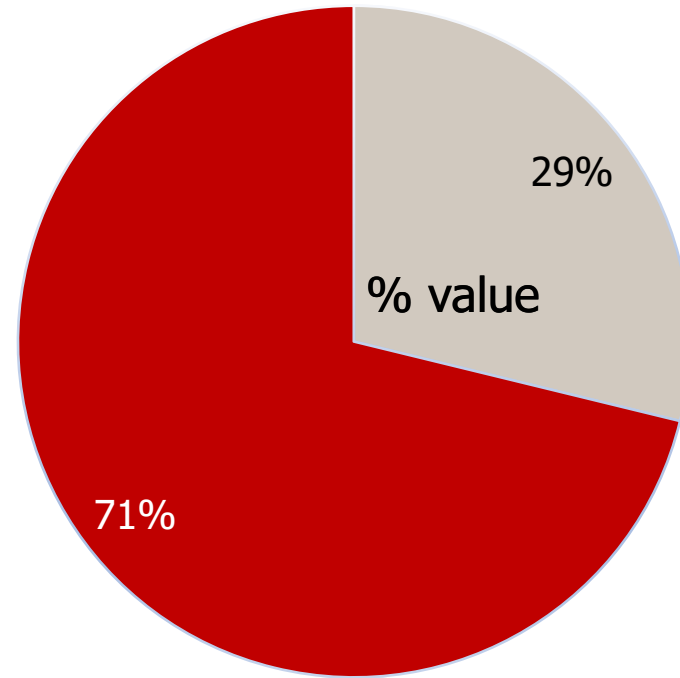
7. Target group description

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8. Conclusion

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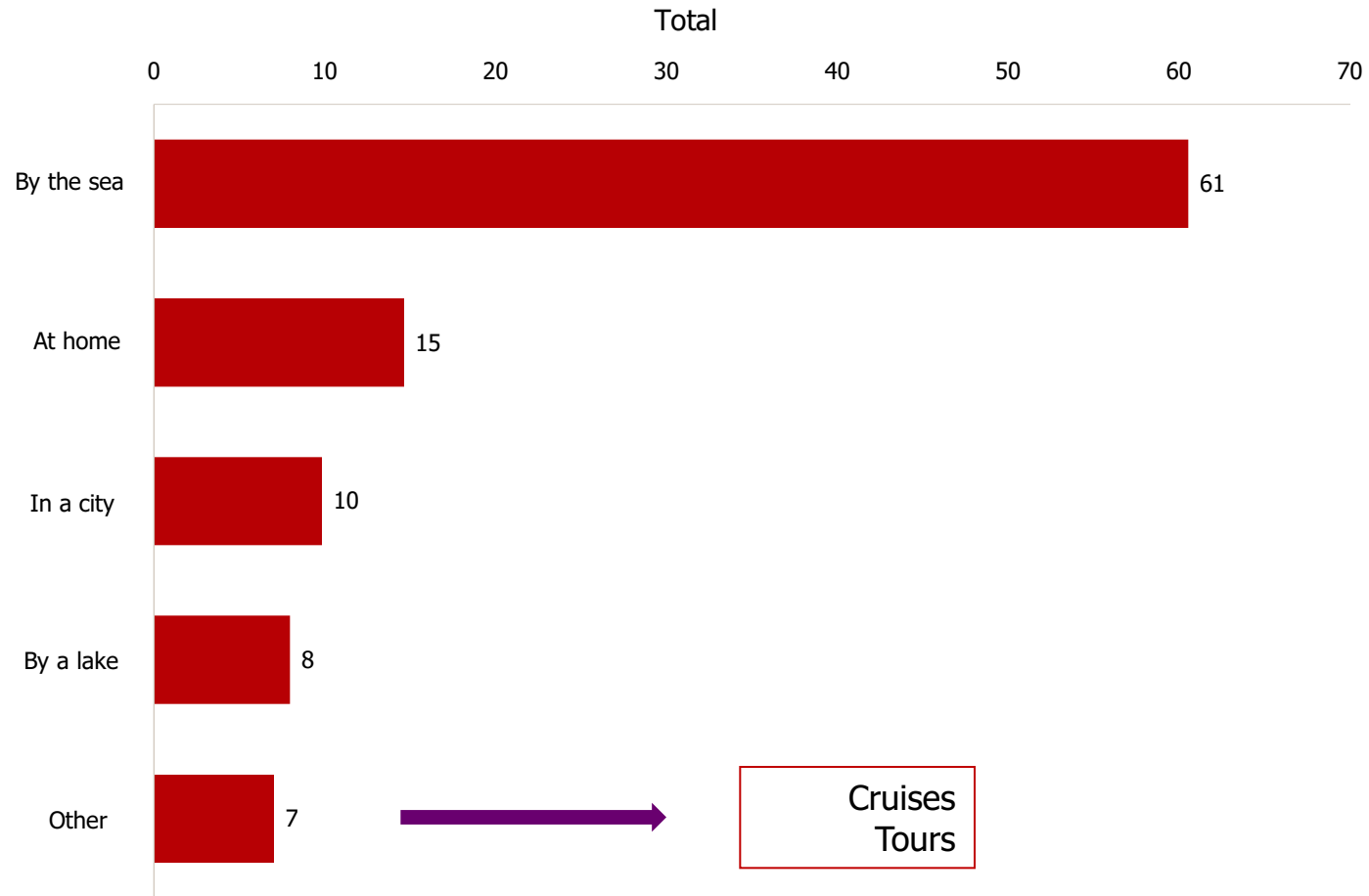
## First holiday in the mountains ever (or for the first time after at least 8 years)



- It was my first holiday in the mountains in more than 8 years
- It was my first holiday in the mountains ever

% value

## Where summer holidays are usually spent



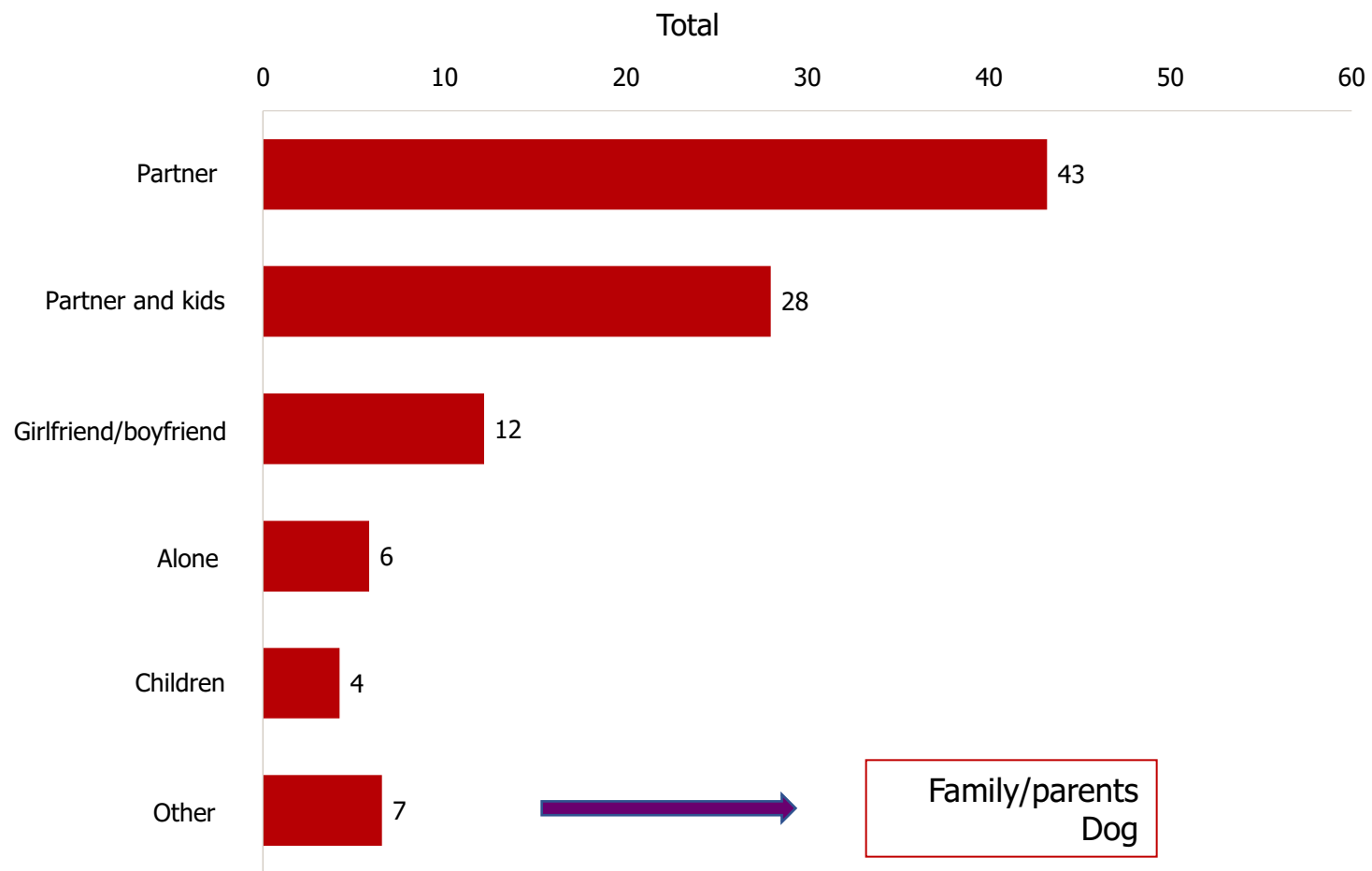
% value

854

**Question 3: Where do you usually spend your summer holidays?**



## Accompanying you on your holiday in the mountains



% value

854

**Question 4: Who did you spend your summer holiday with, in the mountains?**

1. Perception of holidays in the mountains

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2. Perception of mountains

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3. Equipment

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4. Repeating holidays in the mountains

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5. Sustainability

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6. Universal values

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7. Target group description

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8. Conclusion

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## Conclusion (1)

1

The response to the first holiday in the mountains was very positive: 55% rated their holiday experience very positive, and 31% as quite positive. Only a small minority rated their experience negatively.

- The most positive experience of this holiday was among people for whom holidays are essentially time out, a source of relaxation and physical and mental recuperation – they do not want any special adventures, nor do they need a lot of fun and entertainment.
- In terms of sociodemographics, the holiday was perceived more positively by the older age groups.
- Austria and Germany had the most positive perception, Italy and Switzerland somewhat less positive.

2

As far as expectations and individual experiences are concerned, the results of the qualitative survey are essentially borne out.

- There are two main reasons that respondents had not contemplated a holiday in the mountains to date. On the one hand, a holiday like this was simply not relevant: It did not occur to them (52%) – holidays almost automatically equate to the sea. And on the other hand, mountains have negative connotations, such as 'cold', 'strenuous', 'no creature comforts'. For 17% of respondents, negative childhood experiences were to blame. Despite this, they had still opted for it, primarily because they expected very beautiful scenery.

## Conclusion (2)

3 The very positive assessments made after the holiday, can be attributed to several factors.

- Top of the list is the stunning scenery: the landscape, which also includes beautiful bodies of water, the clean air, the sense of freedom, the tranquillity etc. that really made it restful.
- Then, there was the realisation that the mountains can also be enjoyed without being too strenuous: by walking, hiking, using uplift facilities. This is especially suited to the 'relaxed' holidaymaker type.
- Adventure-seekers, who wanted a challenge, went climbing or mountain biking, and they also wanted equipment to be available for hire on location. The entertainment fans tried some sightseeing, but they are the group that tended to enjoy their mountain holiday the least and are not so sure they will go back. If they do, they would like to see more wellness and all-inclusive packages.

4 The main cause for negative ratings was the weather – here, people would like there to be more wet-weather provisions locally.

5 Food also played a role. People felt that good regional cuisine contributes to the attractiveness of a holiday (32%).

## Conclusion (3)

- 6 Almost all respondents felt they had a closer connection to the mountains after their holiday than before. They realised that mountain environments have their own special appeal, and what they offer is now considered valuable: Tranquillity, fresh clean air, water, magnificent views, a sense of freedom – time out, something completely different, physical and mental relaxation. For some, mountain environments assumed the attributes of romance and positive feelings.
- 7 71% said they would like to holiday again in the mountains, 43% said it would be for their main holiday. Those who were least likely were the 'fun & entertainment' types.
- 8 24% purchased special equipment before the holiday, this was mostly footwear. After the holiday, most felt they had not been properly equipped and that they would be better prepared next time – for example, they should have made sure they had really adequate clothing that was suitable for the activities in question. The wrong backpack also presented an issue for many hikers. The Italians felt this most strongly. Here, 53% of them felt they were inadequately equipped.
- 9 The most important criterion in terms of sustainability when buying equipment/clothing was durability, as well as the non-harmful nature of components and social factors.