



POOD

REPORT

Ski Holidays - Perceptions Amongst BIPOC Audiences

December 2021

Commissioned by Crystal Ski and Gal-dem

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RESEARCH APPROACH



RESEARCH OBJECTIVES

- 1 To identify the values, need-states and barriers of our audience when it comes to booking a ski holiday
- 2 To understand what factors of a ski holiday have most appeal for this audience, making it an attractive holiday offering
- 3 To understand what our audience want to see or feel from brands to convince them to travel with them on their next ski holiday



We developed seven starting points to provide a framework for the research.

- 1** We will delve into our audience's data to understand their background, household income and personal lifestyle habits
- 2** What are the key barriers for our audience in choosing a skiing holiday and their ranking of importance? *(e.g. travel persona, class, culture, price point, family needs, holiday preferences)*
- 3** Who or what are the key influencers of our audiences in making their holiday decisions?
- 4** Identify what factors of ski holidays offer most appeal to this audience and why
- 5** Audience Segment Behaviours - Is there a difference in the attitudes towards ski holidays and travel across audience segments? *(e.g. generational differences between Gen Z, Millennials and Gen X, genders (non-binary, women, trans and cis))*
- 6** What are the key narratives or stories that would make skiing more appealing to this audience?
- 7** How would they like to see this in comms and how brands are speaking to them? Are any other brands doing this successfully?



We set out to investigate and understand the perception of winter holidays amongst a BIPOC + LGBTQIA+ demographic. Taking a closer look at their interests and barriers

METHODOLOGY

Our research approach combined quantitative surveying and qualitative targeted focus groups.

The focus groups were conducted with a Pocc discussion facilitator to guide conversation along with a scribe to capture notes. All interviews and focus groups were recorded for internal use.





RESEARCH APPROACH

- 1 Quantitative survey study (goal is to gain an understanding of the target markets holiday preferences and sentiment towards winter holidays)
SAMPLE: UK market, sample 2k+ sent (databases Pocc, Galdem, Kusp), minimum responses 100
- 2 Qualitative targeted focus groups (use answers from survey to find engaged respondents to gain deeper understanding on sentiment, behaviours and preferences)
SAMPLE: Respondents who are likely to convert vs respondents who are unlikely to convert



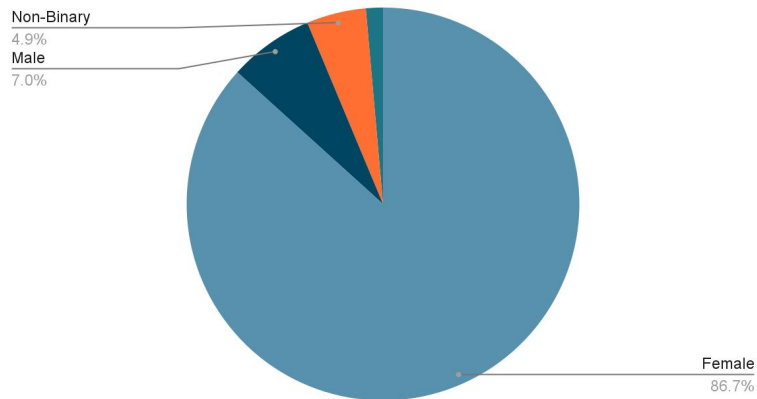
AUDIENCE OVERVIEW

SURVEY RESPONDENTS OVERVIEW

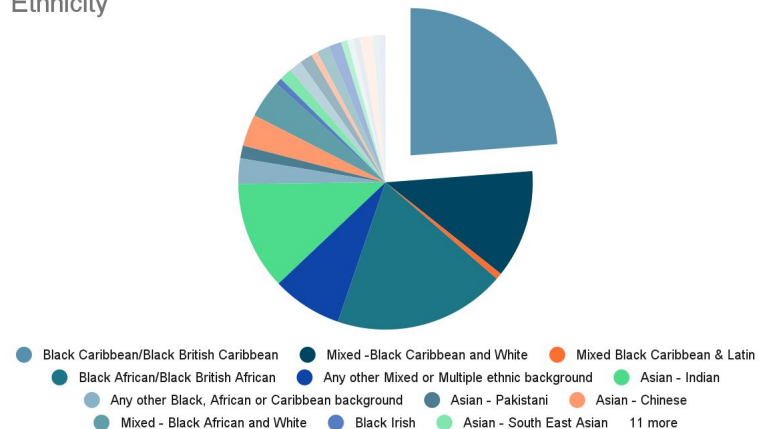
Quantitative surveying 143 respondents across 3 databases. Pocc, Gal-Dem and The Kusp

Focus groups 9 attendees across race, gender, sexuality and age identities

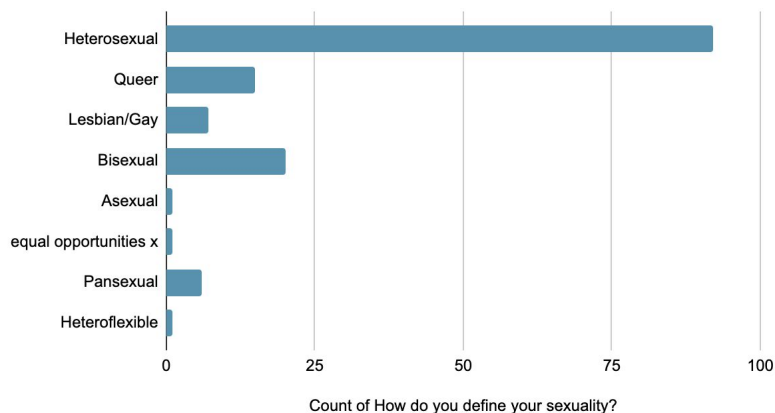
Gender Identity



Ethnicity



Sexuality?



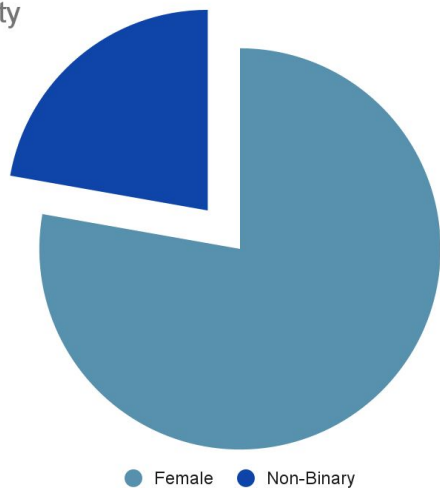
SURVEY RESPONDENTS OVERVIEW

- **A good spread of respondents across the UK - 67% in London, 9.1% SE, and IRL less than 1%**
- **A varied income range 43% earn under 30k, 24% earn 30-40k, and 10% earn 60k+**
- **The majority of respondents are planning to fly out within the next 3 months - 45%. 40% plan 6-9 months and 11% 12+ months**
- **45% Like to relax on holiday, 42% like a packed schedule, 13% enjoy an activity packed high energy break**

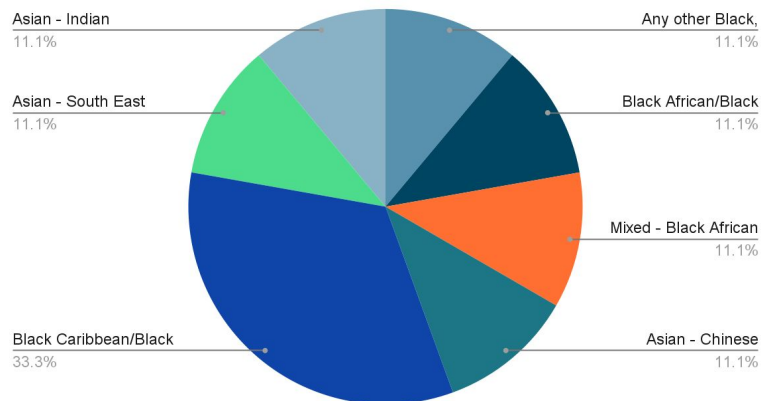
FOCUS GROUPS OVERVIEW

Focus groups 9 attendees across the race, gender, sexuality and age identities

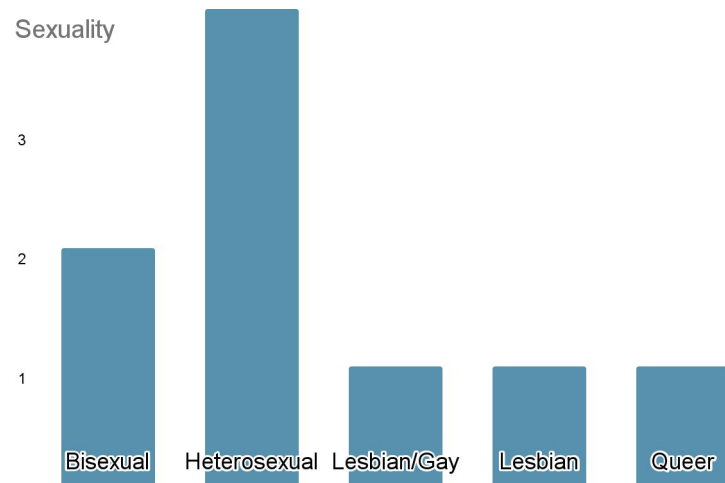
Gender Identity



Ethnicity



Sexuality



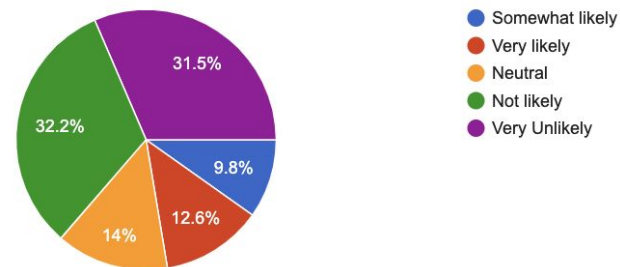
FOCUS GROUPS OVERVIEW

We spoke to 9 survey respondents who had strong responses to the quantitative survey questions focused on winter sport holidays. We split them into two groups:

- Group 1 - Low probability of conversion (booking a winter holiday)
- Group 2 - High probability of conversion (booking a winter holiday)

10. How likely are you to consider a winter holiday (skiing/snowboarding) as a holiday destination in the 6-12 months?

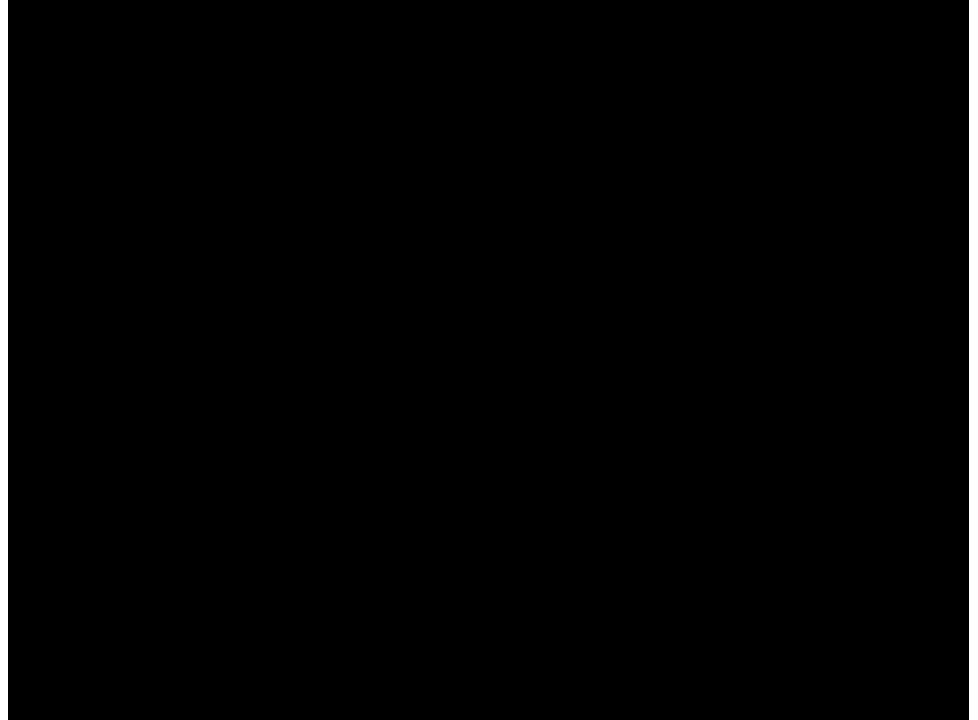
143 responses



THE LOW PROBABILITY TRAVELLER WANTS A HOLIDAY THAT SKIING DOES NOT OFFER

The low probability to book a winter sports holiday traveller has specific desires when it comes to a holiday which makes skiing not an option that they would consider.

This is often the weather, the location, the ability to explore the entire destination, the amenities and the activities, amongst others.



INSIGHTS

1. Respondents had a significant preference for city breaks and sun holidays

They had least interest in cruises, cold holidays and winter sports.

3 TYPES OF HOLIDAYS MOST LIKELY TO GO ON

CITY BREAKS 91%
SUN HOLIDAYS 85%
ADVENTURE HOLIDAYS 42%

3 TYPES OF HOLIDAYS LEAST LIKELY TO GO ON

CRUISE 72%
COLD CLIMATE 53%
WINTER SPORTS 58%



2. Learning about the local culture is a key driver for these travellers when holiday planning

As is the ability to explore the destination and delve into culinary experiences

TOP 3 PRIORITIES WITH PLANNING A HOLIDAY

CULTURE 73%

FOOD 54%

COST 53%

3 THINGS MOST ENJOY ON HOLIDAY

EXPLORING DESTINATION 84%

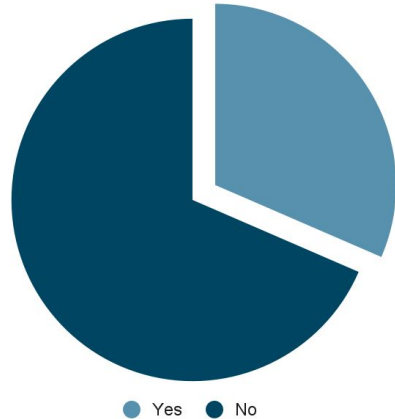
LEARNING ABOUT THE CULTURE 51%

EATING OUT 47%

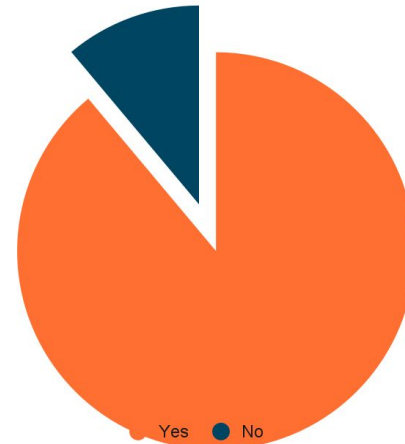


3. Nearly 70% of respondents have never been on a winter sports holiday. But, of the 30% that had been before, nearly 90% claimed to have enjoyed the experience.

Have you been on a winter holiday (skiing/ snowboarding) before?



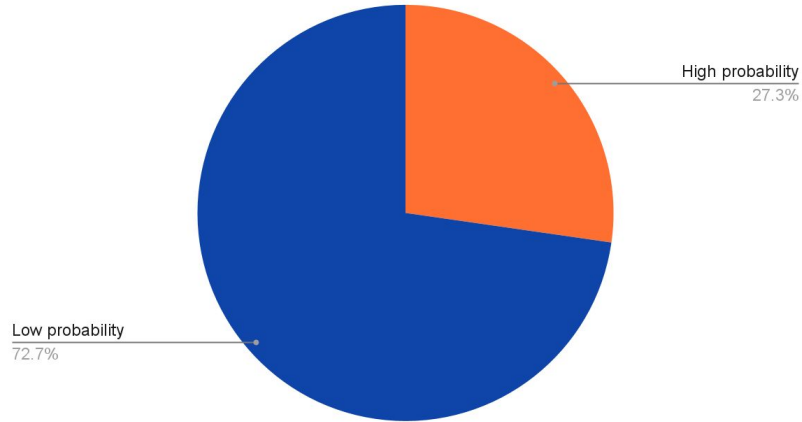
Did you enjoy your winter holiday (Skiing/ Snowboarding)?



4. 1/3 of All Black ethnicities have a high probability to convert into wintersport travellers. Asian ethnicities are close behind with 24%

With the exception of those from a Chinese and Bangladeshi heritage, they have extremely low probability of booking a winter sports break.

Black Travellers with high probability to convert vs low



100%

of survey respondents from Chinese and Bangladeshi backgrounds would not plan a winter sport holiday in the next 12 months



BARRIERS

1. Cost is a major consideration for these travellers when booking a holiday. The price point alone of winter-sport holidays has deterred many of this audience from booking.

53%

of survey respondents said cost is the 3rd most important consideration when booking

“The expense of the equipment needed to take part and the typical culture of the people that can afford to go on these type of holidays. I would expect it to feel quite exclusionary. Also I imagine it would be very cold.”

Female, Mixed Black Caribbean and White ,London, Age 25-30

“The pricey and elitist culture that surrounds this type of holiday is off-putting to me, as a sport I’d be extremely keen to try skiing/snowboarding and imagine that it would be a lot of fun but I also imagine sticking out among the other holidayers”

Female, Asian-Indian, Queer, London, Age 16-24

“I know they’re really expensive so it would have to be quite a commitment to the holiday. Also whilst I’m an active person, I’ve never tried snowboard/ skiing etc so I don’t think I’d be very good at it.”

Female, Asian-Indian, Queer, London, Age 25-30

“I’d rather spend the money on a hot weather holiday. Those winter sport holidays are quite expensive with the equipment hire and lessons etc! Wouldn’t mind the staying in a chalet part but the snow really isn’t for me!” – **Female, Mixed Ethnicity, London, Age 25-30**



2. The cold climate is a key barrier to booking a ski holiday amongst our survey respondents.

I don't like the cold, and winter holidays seem dangerous, exclusive if you can't do the sport, expensive and restrictive in what you can actually do. No sightseeing, exploring, culture visits, etc.

Female, Black African/ Black British, Queer,
London, Age 16-24

The UK weather especially now, makes me want to hop on the plain to somewhere tropical.

Female, Black African/ Black British,
Heterosexual, London, Age 36-40

Prefer sunny relaxing holidays.

Male, Mixed Black Caribbean +
White African, Heterosexual,
London, Age 25-30

I don't like the cold.

Male, Black African/ Black British, London, Age
25-30



3. Lack of winter sports experience causes anxiety around booking this type of holiday.

I enjoyed learning to ski but the cost of a break and my lack of skill level compared to my peers that went as children puts me off.

Female, Black Caribbean/Black British Caribbean, Bisexual, London, Age 25-30

I've never actually tried winter sports and I feel like it's easier if you're introduced to it early, either through family or on a school trip.

Female, Mixed -Black Caribbean and White, Heterosexual, London, Age 25-30

I've never really skied or snowboarded before I'm not sure if i would want to spend a holiday learning how to.

Female, Asian-Indian, Heterosexual, London, Age 25-30

Skiing is terrifying and I hate being cold, it would be embarrassing as I've never skied before and I imagine most others there would be pros!

Female, Mixed Black Caribbean and White, Lesbian, London, Age 16-24



4. Across all age groups, ethnicities and genders winter sports is seen as uninviting exclusionary and non safe for BIPOC

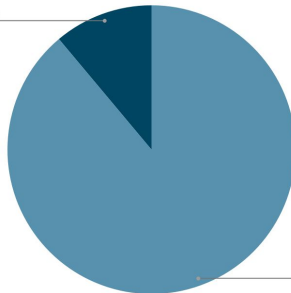


"I've always wanted to do more winter holidays. I've always had snowboarding on my bucket list. But the price has always been a factor and I've always been conscious of how I'd fit in and how I'd be able to do it as a hijab-wearing woman. What would I wear? Would accommodation options have the privacy I'd need if I also want to enjoy a cabin with a hot tub? I have lots of reservations" **Female, Asian-Indian, Heterosexual, East of England, Age 25-30**

"Honestly it feels like a very white upper class dominated space. I prefer to experience more inclusive and diverse cultures on holiday" **Female, Black African/Black British African, Heterosexual, London, Age 31-35**

Focus Group comments on lack of diversity

Didn't mention diversity
11.1%



Mentioned diversity
88.9%

"Activity holidays aren't my top priority when thinking about a break. The impression I have of people who go skiing is overwhelmingly white and affluent, and those who go regularly. I don't think I would feel comfortable in this setting. Also I like to discover a place when I go away, and I feel that ski locations are all centred around that, and there isn't anything else to do". **Female, Asian-Indian, Heterosexual, South-East England, Age 31-35**

"As a non-skiier/snowboarder and as someone who doesn't enjoy either of those activities winter holidays cost a premium for which I am not enjoying the primary activity. As holiday destinations they also do not tend to be particularly diverse and do usually end up being filled with quite middle-class people. That is not my preference for what I am seeking in a holiday environment.."
Female, Black Caribbean/Black British Caribbean, Heterosexual, London, Age 31-35

"Because I can't ski or snowboard and I deem those activities as expensive and traditionally white."
Female, Black African/Black British African, Heterosexual, London, Age 31-35

"It's always felt like something that middle class/wealthy people do, doesn't feel like someone who looks like me would be welcome. I also don't particularly enjoy sports so I don't think I'd like it.."
Female, Mixed Black and East Asian Heterosexual, London, Age 31-35

"I have always wanted to go skiing but have never had the opportunity or funds to go. Any friends that I have asked have not been keen to go as they don't think and I quote "black people ski/snowboard" 🤔"
Female, Mixed Black and East Asian Heterosexual, London, Age 31-35

"The priceyness and elitist culture that surrounds this type of holiday is off-putting to me, as a sport I'd be extremely keen to try skiing/snowboarding and imagine that it would be a lot of fun but I also imagine sticking out among the other holidayers."
Non-binary, Queer, London, Age 16-24

"Seems like a rich white people thing and I would feel super out of place there."
Female, Black African/Black British African, Heterosexual, Spain, Age 41-45



OPPORTUNITIES

1. These travellers are more willing to go on a winter sports holiday if it were booked as a group venture

“My friends and I have never been, but we want to try it out. Our last holiday was a cold one (Iceland) and we really enjoyed it so want to try skiing.”

– **Female, Mixed Black Caribbean and White, Queer, London, Age 25–30**

“Although skiing is not my favourite kind of holiday, it is the easiest kind of holiday to do in Europe in the winter months. I am originally from Brazil, where holidays usually consist of going to the beach or the countryside, constantly accompanied by the warmth and sunshine. Winter in Europe limits the amount of holidays one can take that don't cost a fortune. Skiing is expensive, but if planned in advance can be a fun and active holiday with friends and family”.

Female, Mixed Any ethnicity, Bisexual, Paris, Age 16–24

“It depends on the willingness of others to join’ –**Female, Black African/Black British African, Heterosexual, London, Age 31–35**

“If I were to do a winter holiday with a group of friends then I'd be more likely to go but it isn't my first choice of holiday.”–
Female, Asian-Indian, Bisexual, South East England, Age 16–24

“Would like to find other poc to go on a ski holiday with, to not feel like an outcast at those locations” – **Female, Mixed Black Caribbean and White, Queer, London, Age 25–30**



2. Learning winter sports as a new skill is considered a draw for those with a higher probability of conversion.

I am interested in skiing and improving my skills and I enjoy the fact that being in the UK means that there are many potential ski destinations nearby. However, since the UK is ordinarily quite a cold country, the idea of paying to go and experience further coldness is off putting...

Female, Black African/Black British African, Bisexual, North West England, Age 16-24

Though I've never tried snowboarding or skiing or winter hol before I'd love to try it but haven't got round to it. It might also be fun to have a holiday where there is a built in activity rather than planning your itinerary yourself.

Non-Binary, Black Caribbean/Black British Caribbean, Lesbian/Gay, North West England, Age 36-40

I've been wanting to learn to ski for years but covid got in the way.

Female, Asian-Indian, Heterosexual, London, Age 25-30

As a sport I'd be extremely keen to try skiing/snowboarding and imagine that it would be a lot of fun but I also imagine sticking out among the other holidayers –

Female, Asian-Indian, Queer, Midlands, Age 16-24

I have never tried skiing and I love trying new things. It looks fun, as long as there are all the proper safety stuff in place.

Female, Black African/British African, Bisexual, North East England London, Age 16-24

It was something different. Went with work and had never been on a winter holiday before.



3. Emphasising more of the broader cultural benefits of a winter holiday destination could appeal to our audience's general holiday booking preferences

"It doesn't really appeal to me but in all honesty I don't know why - I love beautiful scenery on holiday and I enjoy hiking and walking."

TOP 3 PRIORITIES WITH PLANNING A HOLIDAY

CULTURE 73%

FOOD 54%

COST 53%

3 THINGS MOST ENJOY ON HOLIDAY

EXPLORING DESTINATION 84%

LEARNING ABOUT THE CULTURE 51%

EATING OUT 47%

"My first winter holiday was in Japan and it was my first time snowboarding and it was so much fun albeit falling down numerous times! Besides snowboarding, there were also other winter sports, activities and sights rich with stories on heritage and culture - things that I wouldn't get the chance to experience back in London."



4. Opportunity to represent and reframe the winter holiday experience as a holiday option for Black and Brown LGBTQIA+ people

However this should be considered alongside end-to end review and implementation of a holistic inclusive booking process and holiday environment - including price, community initiatives, lesson and package experiences.

"I've never really considered it but being that I live in a cold country I would prefer to escape to somewhere more warm - **plus being completely honest I've never really see black people going skiing (unless they come from money) so it's not really my scene**".

"Seems like a rich white people thing and I would feel super out of place there."

Female, Black African/Black British African, Heterosexual, Spain, Age 41-45

"I don't like skiing, it feels too white and I feel out of place."

"I have always wanted to go skiing but have never had the opportunity or funds to go. Any friends that I have asked have not been keen to go as they don't think and I quote "black people ski/snowboard" 🙄"



FINAL TAKEOUTS

The high probability traveller wants to be seen by the brand/s

+

The 'high probability' to book a winter sports holiday traveller also has specific desires but is more willing to try something new compared to the low probability traveller.

Weather, location and destination is also important to them but they would also like to experience a winter sports holiday.

If brands were being more pro-active in their brand choices and were talking to these BIPOC travellers in marketing then conversion would be likely to increase.

+



1. Lean into holistic visual representation in marketing and price deals, and bring forward the fun of learning a new winter sport.

“Feels like it is meant to keep people out and remain a sacred club to white middle class people.”

Observation:

Winter holidays currently does not present itself as inclusive in terms of the culture, cost, environment and marketing representation.

BIPOC travellers look for:

- 1) inclusive and safe welcoming places when researching where to travel.
- 2) value for their money in booking their holidays.

They also have reservations around booking because of:

- 3) Anxieties around lack of winter-sports experience
- 4) Prospect of booking a trip alone



Marketing Suggestion:

- 1) Look at the inclusivity of the environment and the marketing activities. The authenticity of how the brand chooses to approach diversity across all customer touchpoints will determine how successfully the brand can appeal to a BIPOC, LGBTQIA+ audience.
- 2) Lean into price deals and discounts to convert those with a high probability of conversion.
- 3) Offer deals on winter sports schools for adults and groups
- 4) Lean into the fun of learning a new winter sports experience.
- 5) Partner with and amplify the ethnic and LGBTQIA+ travel groups to create a presence amongst these traveller communities

2. Spotlight the wider holiday benefits of the destination, culture and key sights in comms – not just the winter sport activity.

Observation:

These travellers enjoy an active and productive lifestyle even when on holiday. Culture and destination exploration is a huge driver for many of these travellers. This audience are heavily into:

- 1) exploring the destination
- 2) experiencing the culture
- 3) have food, comfort and safety at the top of their priority lists.



Marketing Suggestion:

Lean into the general holiday preferences of these travellers and bring forward the cultural elements of the winter holiday to convert the high probability and low probability travellers:

- 1) spotlighting the destination's surrounding landmarks / spotlights. Don't just focus on the winter-sports – the Northern Lights, local spa facilities etc.
- 2) emphasising the culture and culinary experiences of winter destinations when communicating with them e.g. hot chocolate / hot wine

3. Bring forward the attraction of experiencing a holiday as a group and support this with group deals and offers in the product ecosystem

Observation:

- 1) A huge part of the experience is who our audience travel with. Many of these travellers find the idea of a group activity a draw for this type of winter holiday.



Marketing Suggestion:

- 1) Highlight the opportunity to bond and make memories as a group in brand and performance marketing activities
- 2) Offer group price deals to convert those with high probability of conversion

4. Marketing spend and reach should focus on the millennial traveller and Gen X vs Gen Z

Observation:

11% of Gen Z are likely or very likely to book a winter sports holiday in the next 12 months vs 21% of millennials or 17% of Gen X



Marketing Suggestion:

Focus marketing activities and media buys with a high reach and conversion rate of a millennial audience vs Gen Z

END