

2018 China Ski Industry White Book

**Benny Wu (Wu Bin) & Wei Qinghua
& Meituan Attraction Tickets**

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@ISPO Munich

- **Sharing to create value**
- **Just the Data, Just the Facts**

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2018 China Ski Industry White Book

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Legal Notice

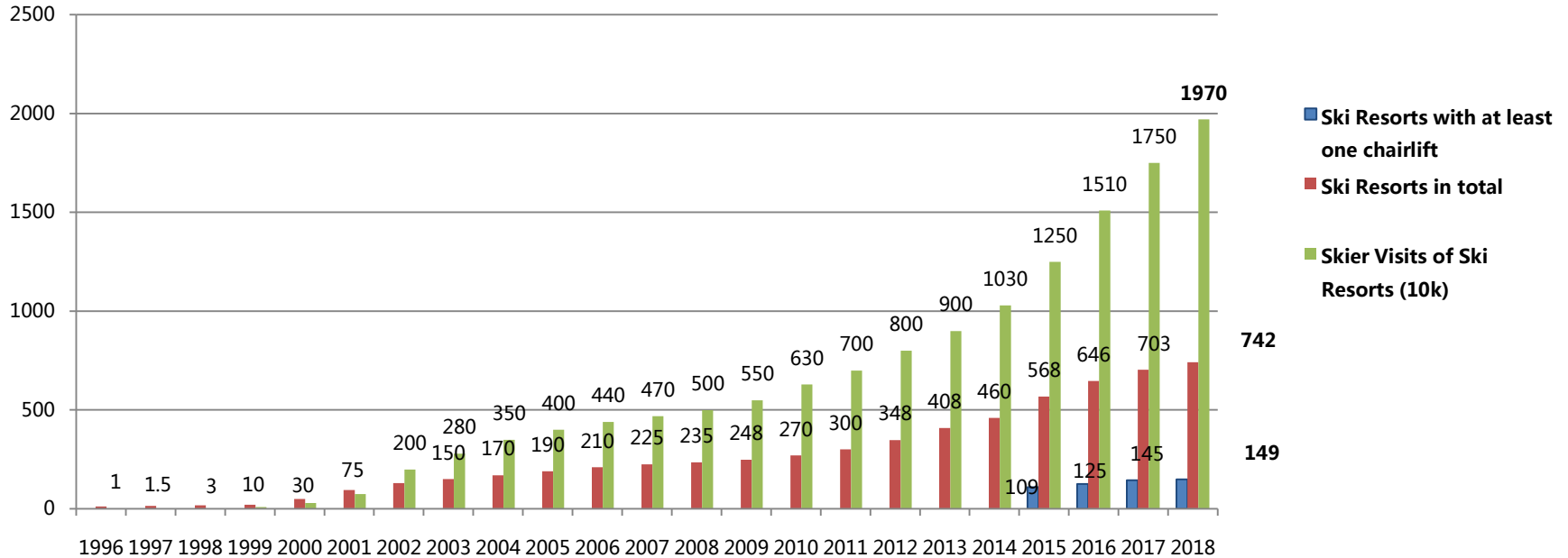
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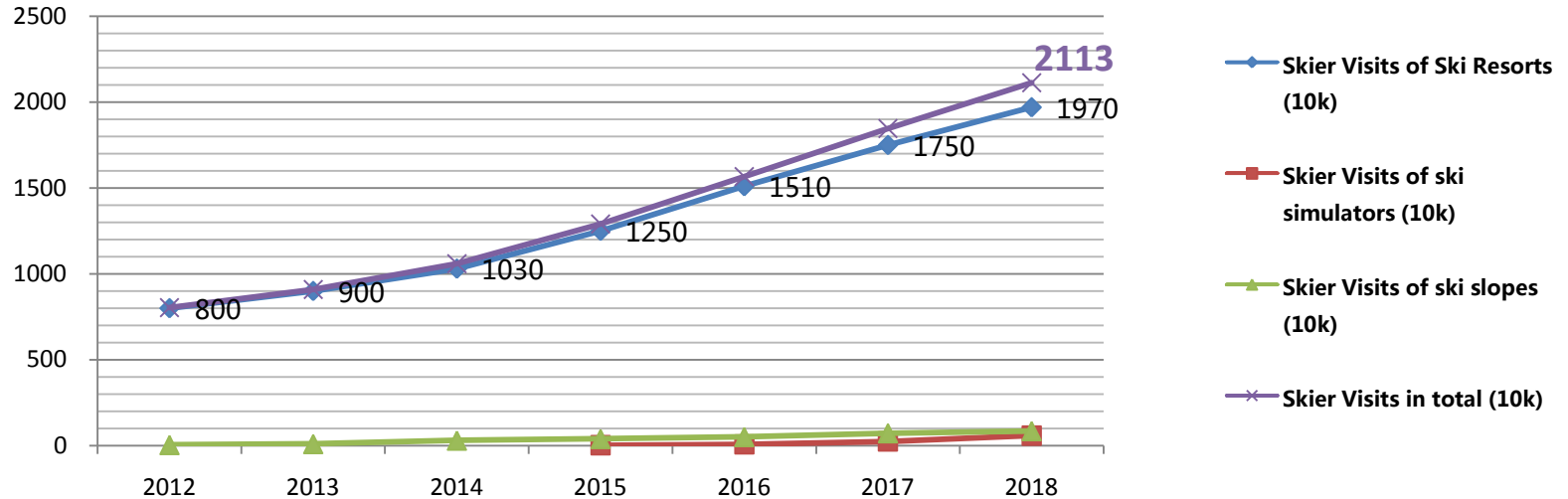
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Number of Ski Resorts & Skier Visits(10k)



Note: "ski resorts in total" and "skier visits of ski resorts" in this figure include indoor ski resorts, excluding dry slopes and ski simulators.

Skier Visits in total (10k)(ski resorts & dry slopes & ski simulators)



Year	Skier Visits of Ski Resorts (10k)	Skier Visits of ski simulators (10k)	Skier Visits of ski slopes (10k)	Skier Visits in total (10k)
2018	1970	58	85	2113

2018 Key Data

2018 China Ski Industry White Book

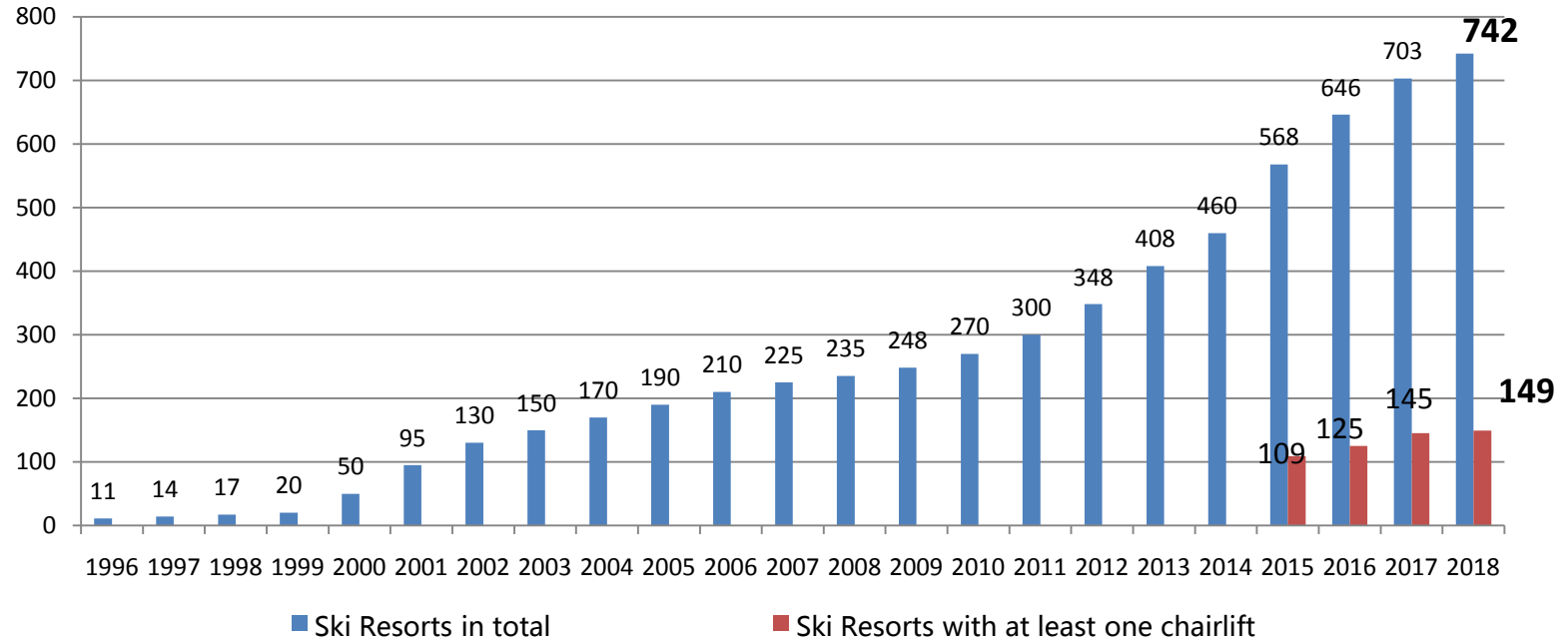
Key index	2018	2017	Growth	Rate
Ski Resorts in total	742	703	39	5.55%
Ski Resorts with at least one chairlift	149	145	4	2.76%
In-door Ski Resorts (Artificial Snow)	26	21	5	23.81%
Skier Visits of Ski resorts (10k)	1970	1750	220	12.57%
Skier Visits in total (10k)	2113	1847	266	14.40%
Dry Slopes (sq.m)	152420	123220	29200	23.70%
Ski Simulators	145	69	76	110.14%
Aerial Lifts	250	236	14	5.93%
Detachable Lifts	54	48	6	12.5%
Magic Carpets	1196	1076	120	11.15%
Snowmakers	7410	6600	810	12.27%
Groomers	541	485	56	11.55%

Ski Resort (Supply-side)

- I Number & Distribution
- II Classification Statistics
- III Facilities Statistics

I Number & Distribution

Number of ski resorts



Distribution Map of major ski resorts in China (Ski Resorts with at least one chairlift)

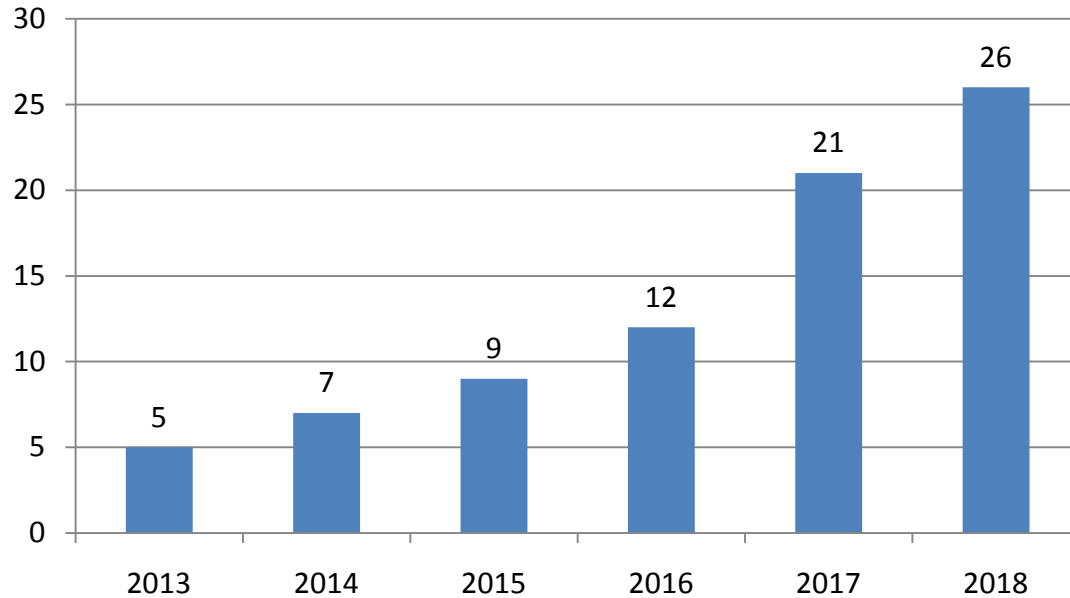


Number of ski resorts by province

No.	Province	2018	2017	2018 growth
1	Heilongjiang	124	124	0
2	Shandong	65	61	4
3	Xinjiang	60	59	1
4	Hebei	59	58	1
5	Shanxi	48	45	3
6	Henan	43	42	1
7	Jilin	43	41	2
8	Neimenggu	42	37	5
9	Liaoning	38	37	1
10	Shaanxi	34	31	3
11	Beijing	24	24	0
12	Gansu	21	20	1
13	Zhejiang	19	18	1
14	Jiangsu	17	15	2

No.	Province	2018	2017	2018 growth
15	Chongqing	16	14	2
16	Tianjin	13	13	0
17	Ningxia	13	12	1
18	Sichuan	11	11	0
19	Hubei	11	7	4
20	Guizhou	10	10	0
21	Hunan	9	8	1
22	Qinghai	8	7	1
23	Yunnan	4	2	2
24	Anhui	3	3	0
25	Guangxi	2	2	0
26	Jiangxi	2	0	2
27	Guangdong	2	1	1
28	Fujian	1	1	0
Total		742	703	39

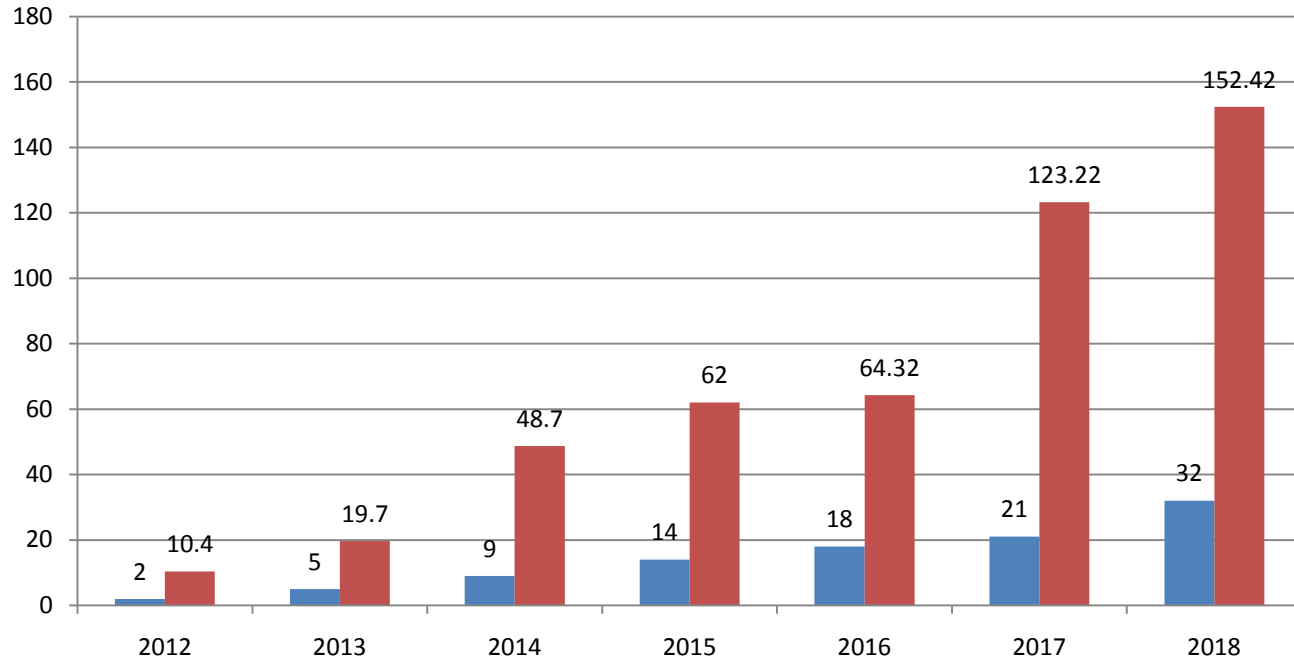
Number of indoor ski resorts in operation in China



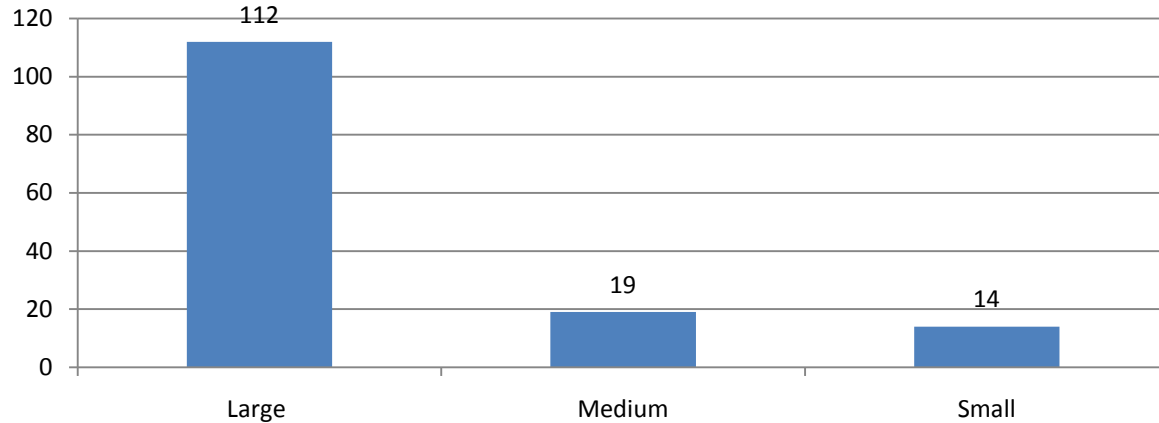
Distribution of ski resorts project of main planning & design company in 2018-2019

No.	Province	Amount
1	Hebei	7
2	Jilin	4
3	Xinjiang	3
4	Shanxi	2
5	Sichuan	2
6	Liaoning	2
7	Qinghai	1
8	Anhui	1
9	Shandong	1
10	Hubei	1
11	Heilongjiang	1
12	Fujian	1
	Total	26

Amount & area of dry slopes



Ski Simulators



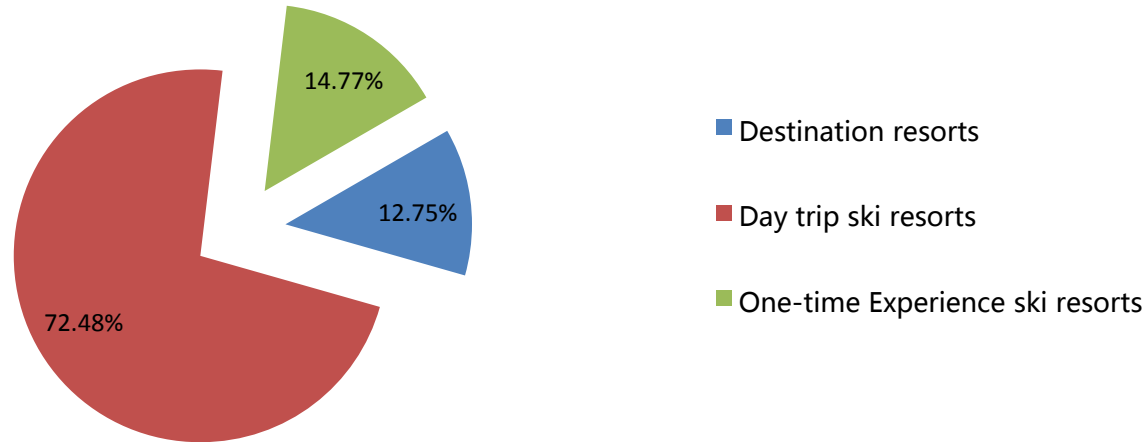
According to a report provided by Winter Wonderland, as of the end of 2018, there were more than 62 ski simulators venues , 145 ski simulators across the country. Beijing, Shanghai and Guangdong ranked the top with 43.45%, 20% and 7.59% respectively.

II Classification Statistics

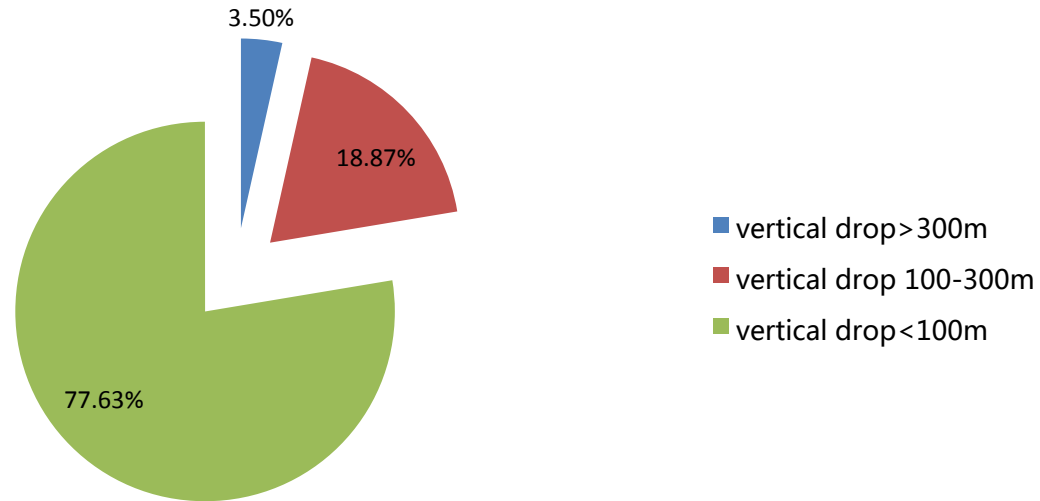
Classification of ski resorts by target group

Type of ski resort	Per.	Target group	Attributes	Resort Feature	Consumer Characteristics	Cases
One-time Experience ski resorts	75%	Sightseeing / Experience Guests	Tourist	Poor facilities, only intermediate trails. Near scenic or cities.	More than 90% one-time experience; stay 2 hours.	Xiling Snow Mountain Daming Mountain Shennongjia
Day trip ski resorts	22%	Local / Regional Guests	Sportive Tourist	Little vertical drop, in suburban areas, all kinds of trails.	Mainly road trip; stay 3~6 hours.	Nanshan Jundushan Vanke-Shijinglong TOREAD Songding
Destination resorts	3%	Destination Guests	Vacation Sportive Tourist	considerable scale trails, well accommodations and auxiliary facilities.	overnight visitors; stay more than 1 day.	Lake Songhua (Vanke) Changbaishan (Wanda) Beidahu Yabuli Wanlong Thaiwoo Fulong Genting

Classification of ski resorts with at least one chairlift by target group



Classification of Ski Resorts by vertical drop



Ski resorts vertical drop Top 10 (2018)

No.	Resorts	Vertical drop (m)	Location
1	Yabuli high mountain	885	Heilongjiang
2	Beidahu	870	Jilin
3	Xinjiang Silkroad	700	Xinjiang
4	Chahanying	675	Inner Mongolia
5	Shangri-la	662	Yunnan
6	Vanke Lake Songhua	600	Jilin
7	Wanlong	580	Hebei
8	Yabuli Sun Mountain	540	Heilongjiang
9	Thaiwoo	510	Hebei
10	Fulong	480	Hebei
10	Mylin Valley	480	Inner Mongolia

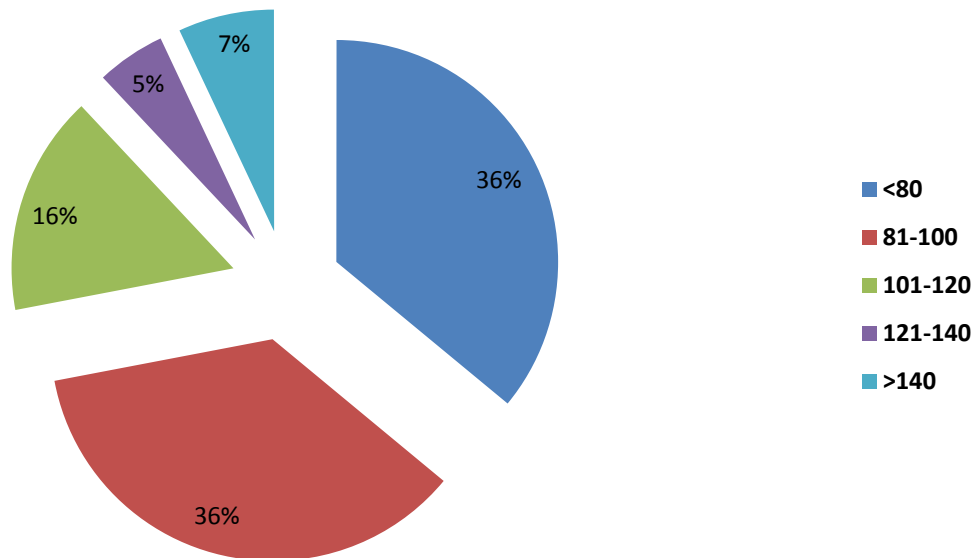
Classification of ski resorts by area of slopes

area of slopes (hectare)	number of ski resorts	proportion	Ski Resorts with at least one chairlift	proportion
>100	8	1.08%	5	3.36%
50-100	6	0.81%	6	4.03%
30-50	15	2.02%	15	10.07%
10-30	35	4.72%	35	23.49%
5-10	106	14.29%	88	59.06%
<5	572	77.09%	0	0.00%
Total	742	100.00%	149	100.00%

2018 ski resorts slope area TOP10 (free of wild slope)

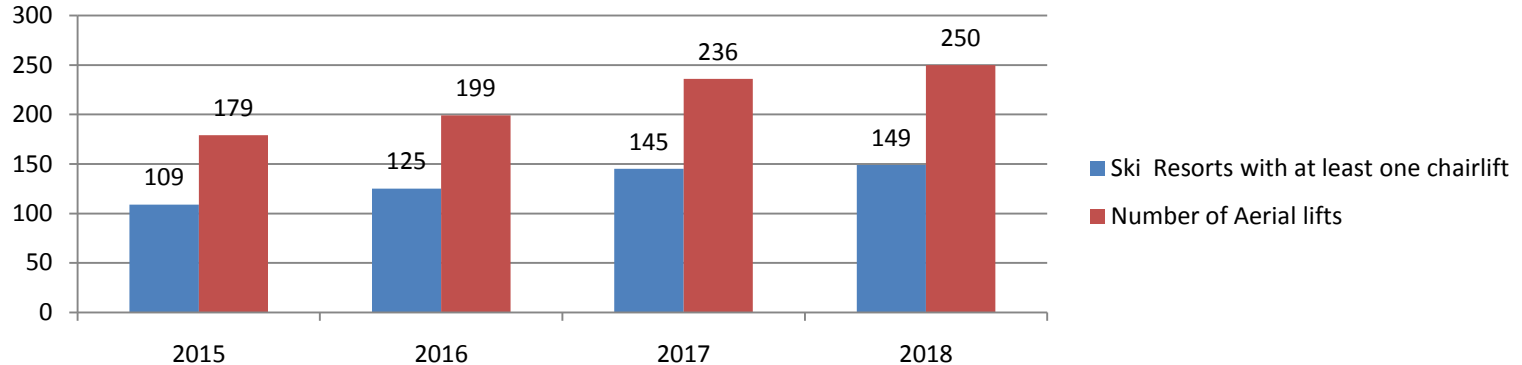
No.	Ski Resorts	Area of slopes (hectare)	Location
1	Silkroad	170	Xinjiang
2	Vanke Lake Songhua	150	Jilin
3	Wanlong	140	Hebei
4	Beidahu	126	Jilin
5	Changbaishan	100	Jilin
6	Genting	100	Hebei
7	Thaiwoo	80	Hebei
8	Fulong	75	Hebei
9	Yabuli Sun Mountain	50	Heilongjiang
9	Aoshan	50	Shaanxi

Classification of ski resorts by Business days



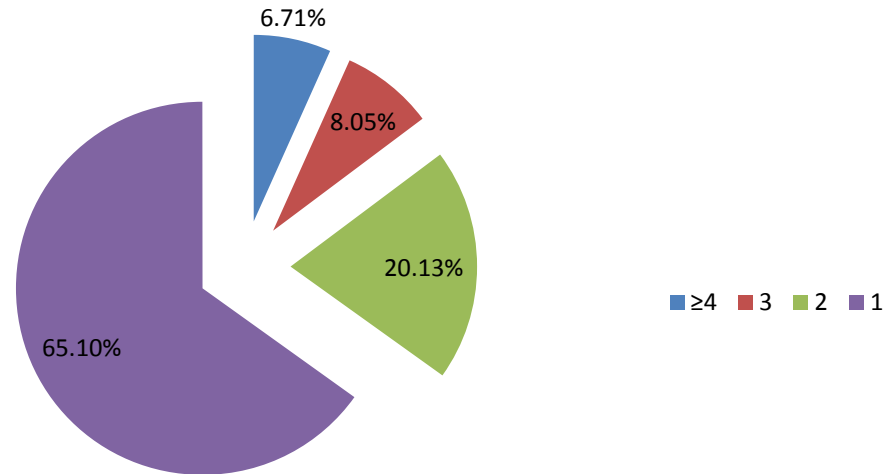
III Facilities Statistics

Number of Ski Resorts with at least one chairlift & Number of Aerial lifts



Hebei, Heilongjiang and Jilin are located in the top three with 49, 39 and 37 respectively. At the same time, a total of 125 aerial ropeways were built in the three provinces, accounting for 50% of all aerial ropeways.

Classification of ski resorts by number of Aerial Lifts

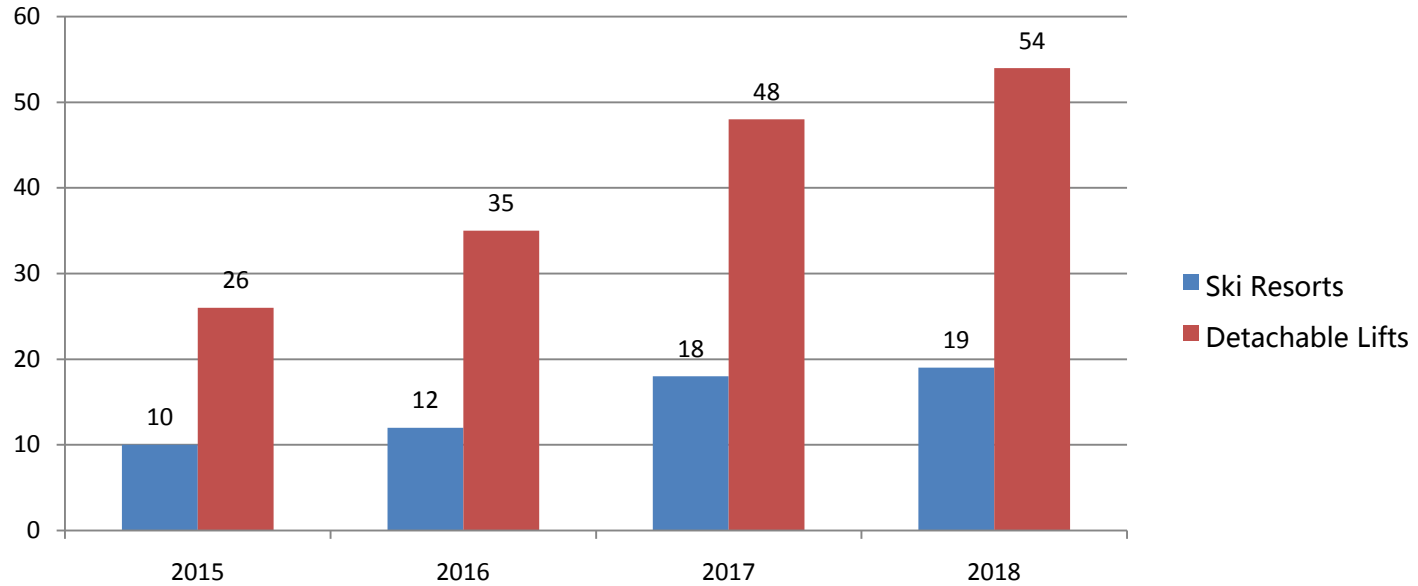


Distribution of aerial lifts in ski resorts(2018)

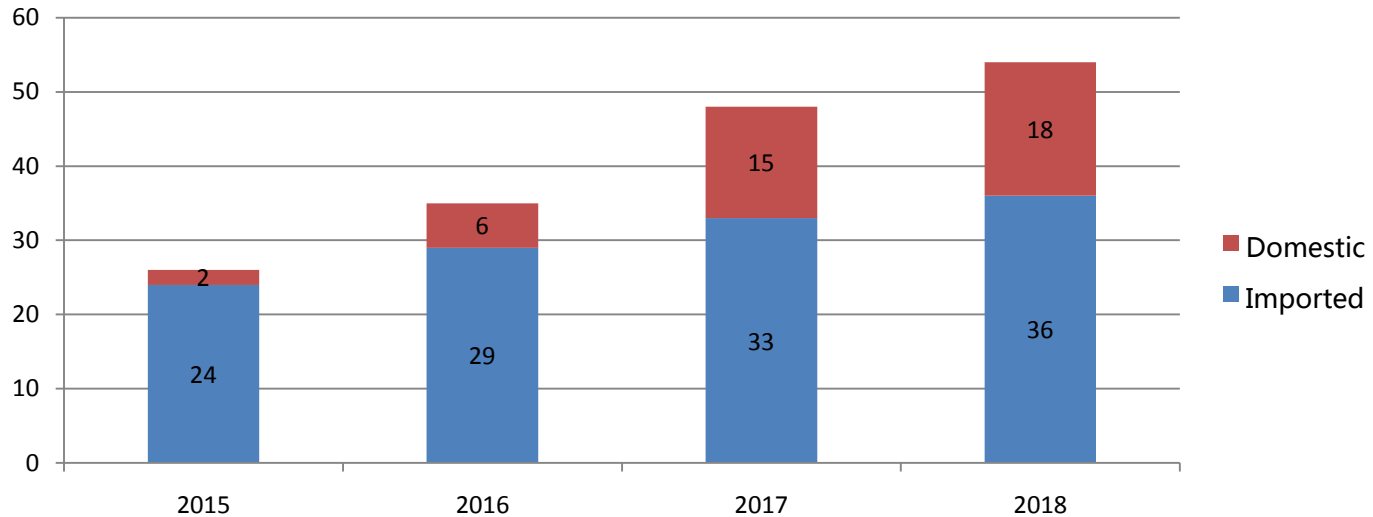
No.	Province	Aerial lifts	Ski resorts
1	Hebei	49	22
2	Heilongjiang	39	26
3	Jilin	37	16
4	Liaoning	28	19
5	Beijing	20	12
6	Xinjiang	19	10
7	Inner Mongolia	15	10
8	Shanxi	8	5
9	Gansu	8	7

No.	Province	Aerial lifts	Ski resorts
10	Shandong	6	6
11	Shaanxi	5	4
12	Henan	3	2
13	Chongqing	3	3
14	Sichuan	3	2
15	Yunnan	3	1
16	Guizhou	2	2
17	Tianjin	1	1
18	Hubei	1	1
Total		250	149

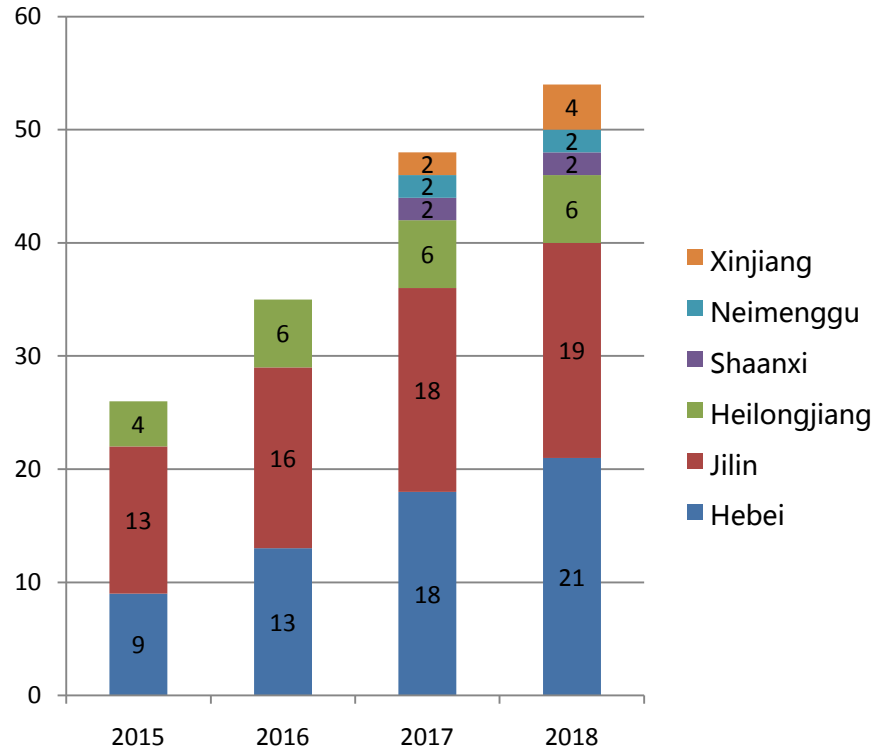
Number of detachable Lifts (2018)



Classification of detachable lifts by imported/domestic



Distribution of detachable lifts (2018)

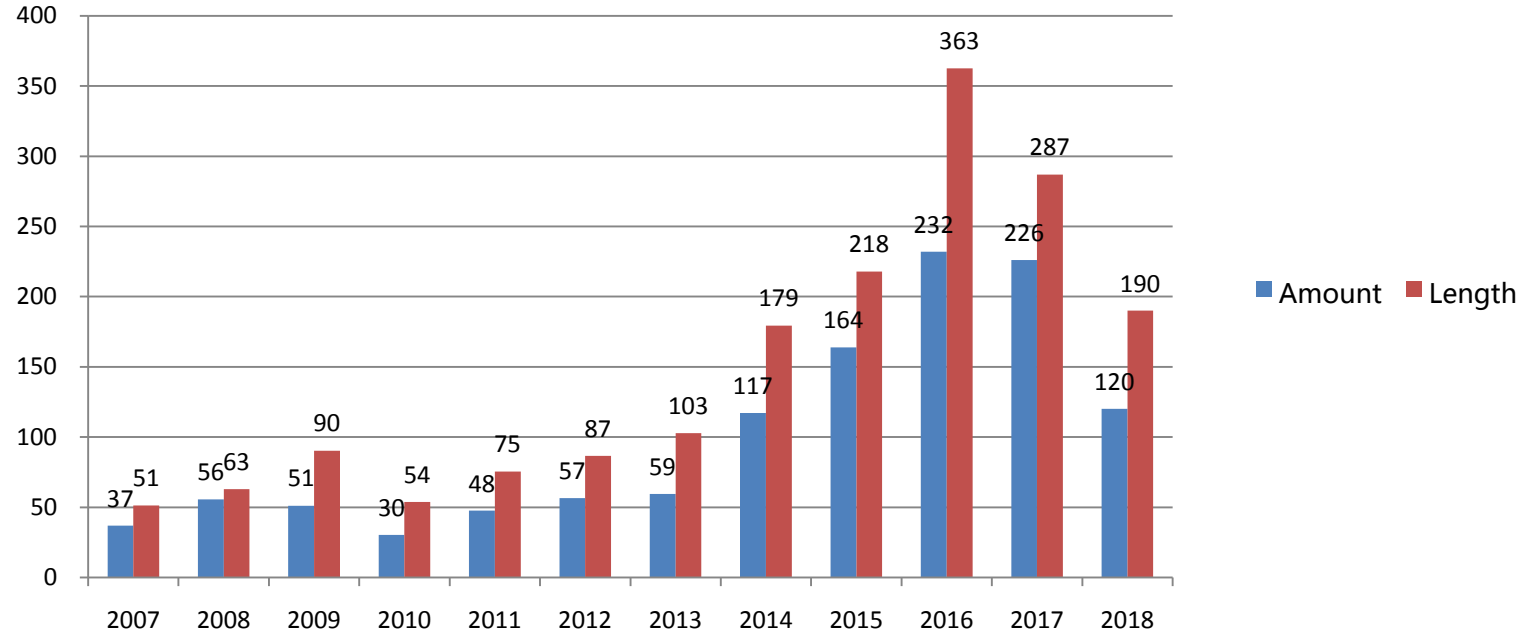


- 54 detachable **for skiing**, there are
- 21 in Hebei Province, 7 ski resorts, all concentrated in Chongli, Zhangjiakou City;
 - 19 in Jilin Province, distributed in 6 ski resorts;
 - 6 in Heilongjiang Province, distributed in 3 ski resorts;
 - 4 in Xinjiang, distributed in 2 ski resorts;
 - 2 in Shaanxi and Inner Mongolia.
- (Note: This statistic only includes ropeways for skiing, excluding for transportation)

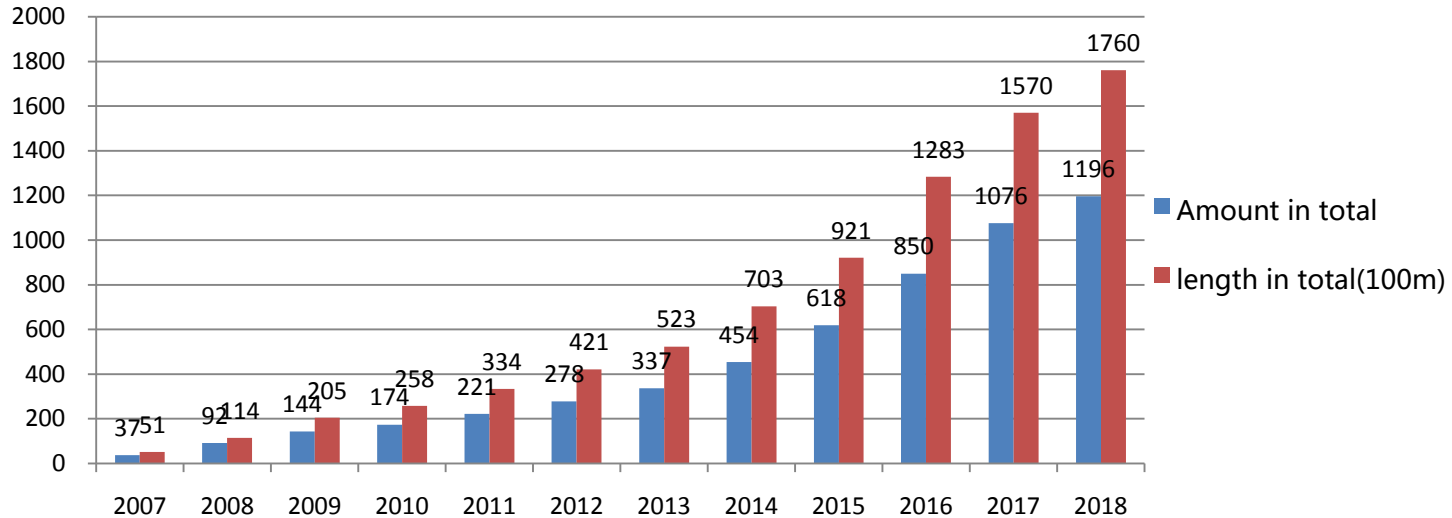
Detachable lifts in ski resorts(2018)

No.	Rank	Ski Resorts	2018	Province
1	1	Vanke Lake Songhua	6	Jilin
2	1	Wanlong	6	Hebei
3	3	Wanda Changbaishan	5	Jilin
4	3	Thaiwoo	5	Hebei
5	5	Beidahu	4	Jilin
6	5	Genting	4	Hebei
7	7	Silkroad	3	Xinjiang
8	7	Fulong	3	Hebei
9	7	Yabuli high mountain	3	Heilongjiang
10	10	Aoshan	2	Shaanxi
11	10	Luneng	2	Jilin
12	10	Cuiyunshan Yinhe	2	Hebei
13	10	Yabuli Sun Mountain	2	Heilongjiang
14	10	Liangcheng Daihai	2	Inner Mongolia
15	15	Miaoxiangshan	1	Jilin
16	15	Duolemeidi	1	Hebei
17	15	Maoershan	1	Heilongjiang
18	15	Lianhuashan	1	Jilin
19	15	General Mountain	1	Xinjiang
		合计	54	

New Magic Carpets in ski resorts(2018)

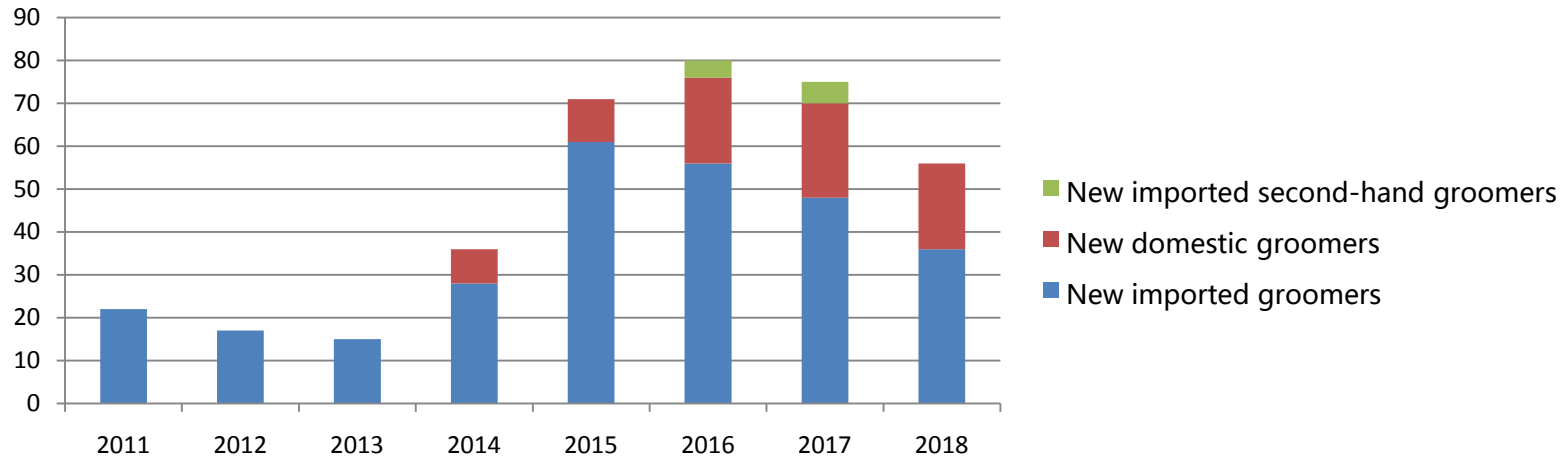


Amount & Length of Magic Carpets in total (2018)



The data of the magic carpet comes from the main domestic suppliers such as Daowo and Yahao. By 2018, there are **1196** magic carpets in ski resorts in total, which including **120** new carpets in 2018. The total length is **176KM**.

New Groomers in ski resorts(2018)



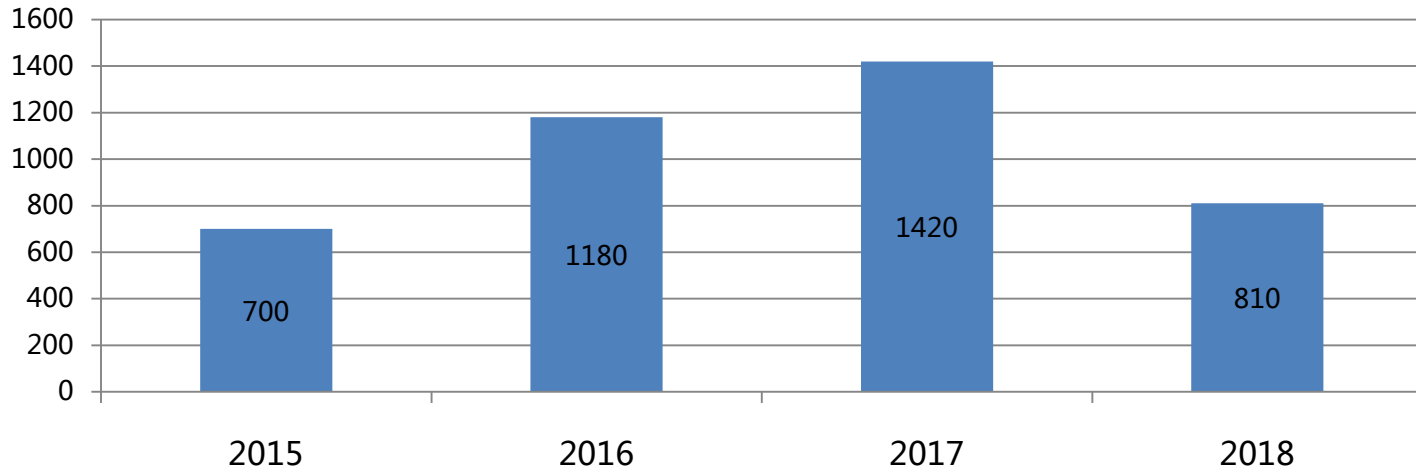
There are **541** groomers in ski resorts in total, 56 new machines which is down from 75 in 2017. Among them, 36 new imported, a large decline year-on-year. This data comes from the main groomer supplier.

China Import Statistics (Commodity: Track-Laying Tractors)

Partner Country	Unit	Calendar Year					Year To Date		
		2013	2014	2015	2016	2017	11/2017	11/2018	Change%
World	NO	23	31	68	68	60	58	52	-10.34
Italy	NO	10	18	28	28	24	24	31	29.17
Germany	NO	6	7	16	20	27	25	20	-20
China	NO	0	0	0	0	0	0	1	
Finland	NO	1	1	0	0	0	0	0	
Austria	NO	0	0	1	0	0	0	0	
Canada	NO	2	4	12	11	6	6	0	-100
Japan	NO	2	0	7	1	1	1	0	-100
Russia	NO	0	0	0	1	0	0	0	
United States	NO	2	1	4	7	2	2	0	-100

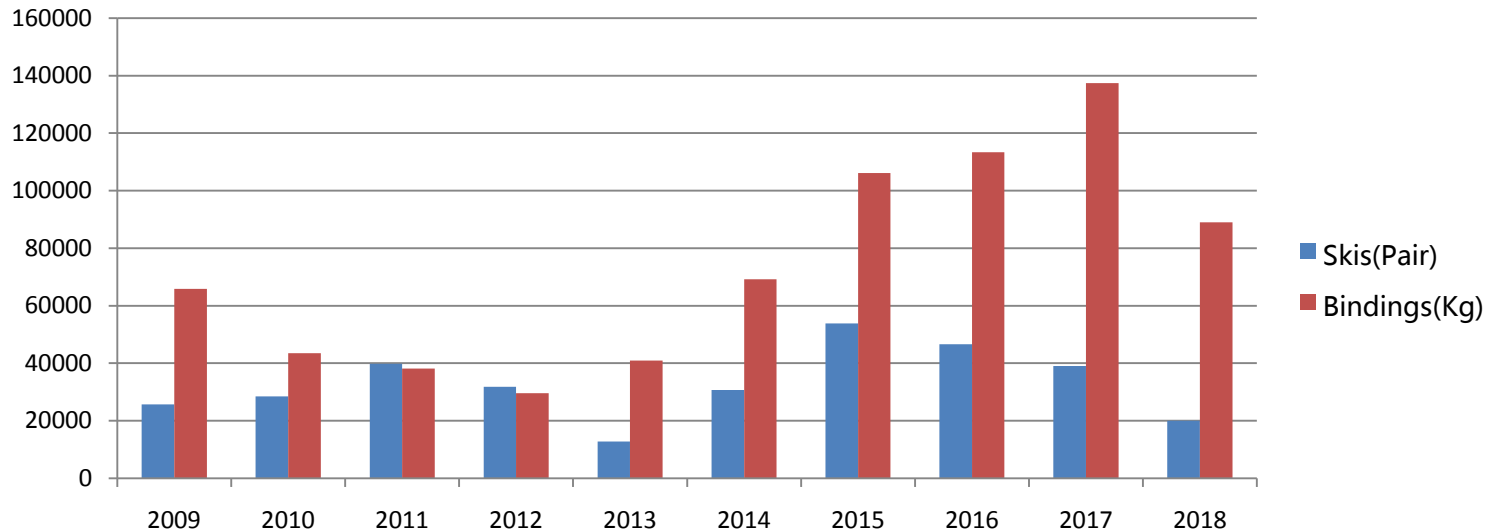
Quote: China Customs, Beijing Longzhixun Information Consulting Co., Ltd.

New Snowmakers in ski resorts(2018)



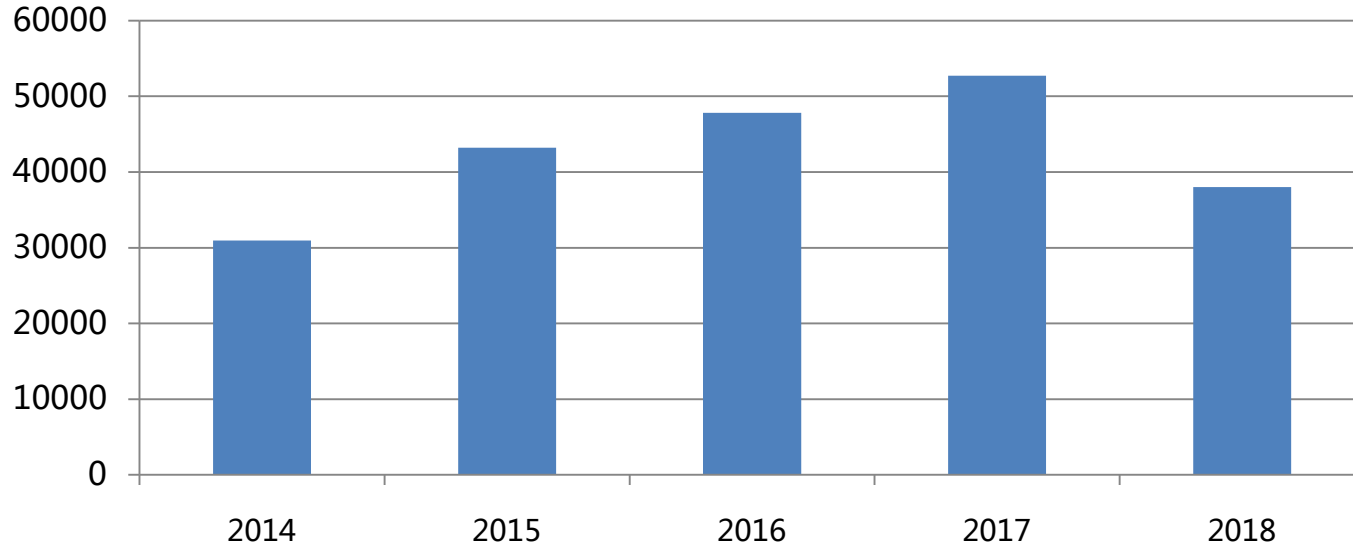
There are about **7,410** snowmakers in ski resorts in total, which including **810** new machines in 2018, far less than the 1,420 in 2017.

China Import Statistics (Commodity: Skis & Bindings)



Quote: China Customs, Beijing Longzhixun Information Consulting Co., Ltd.

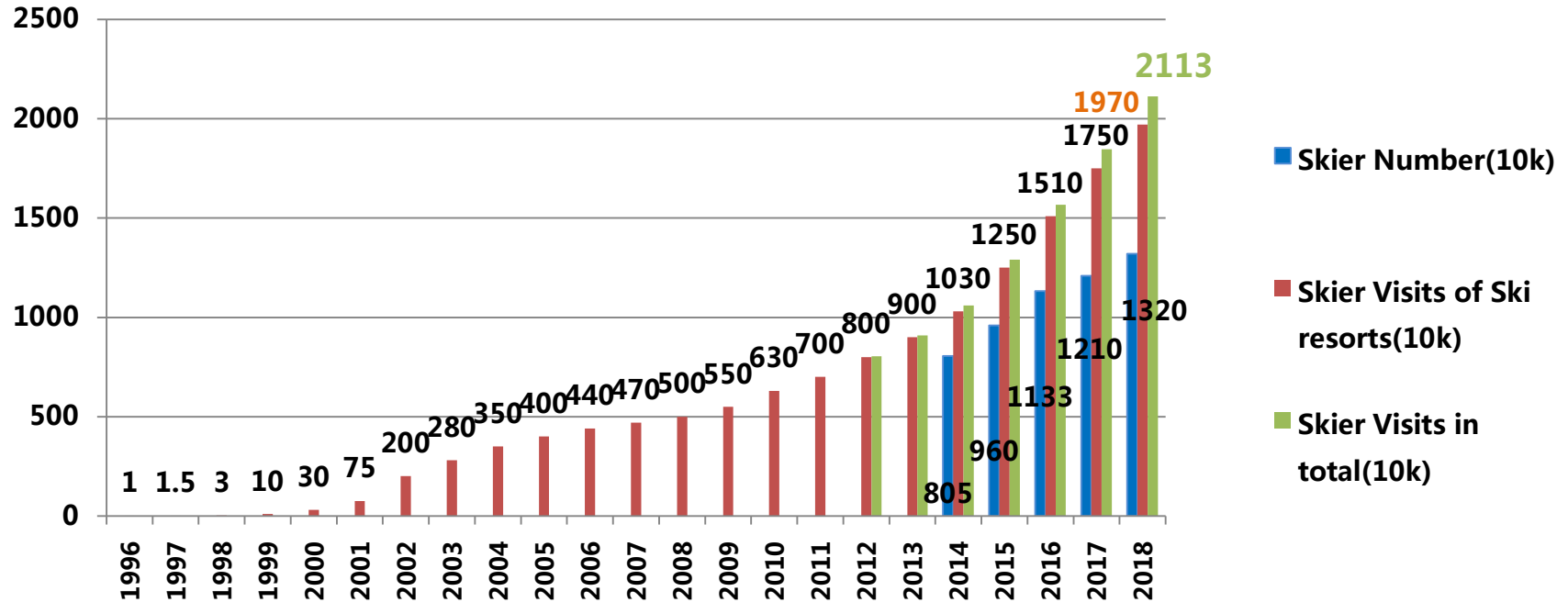
New Rental Skis in Ski Resorts (2018)



Skier (Demand-side)

I Skier Visits & Distribution

Skier Visits in total & Skier Visits of Ski resorts & Skier Number



Distribution of Skier Visits (By Province)

Rank	Province	2018 Ski Resort Amount	2018 Skier Visits (10K)	YOY%	2017 Ski Resort Amount	2017 Skier Visits (10K)
1	Heilongjiang	124	221	12.76%	124	196
2	Hebei	59	210	19.32%	58	176
3	Jilin	43	184	25.17%	41	147
4	Beijing	24	176	5.39%	24	167
5	Shanxi	48	115.5	5.00%	45	110
6	Zhejiang	19	100	9.89%	18	91
7	Inner Mongolia	42	97.8	16.43%	37	84
8	Xinjiang	60	96	11.63%	59	86
9	Shandong	65	94	-9.62%	61	104
10	Henan	43	93.4	3.78%	42	90
11	Shaanxi	34	82	20.59%	31	68
12	Liaoning	38	73	5.80%	37	69
13	Sichuan	11	72	24.14%	11	58
14	Gansu	21	65	16.07%	20	56

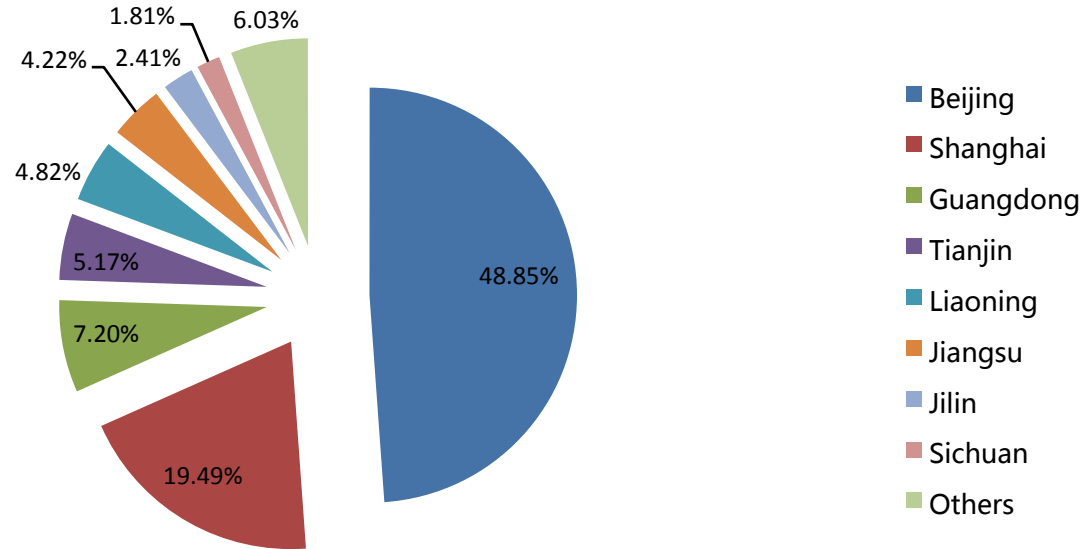
Distribution of Skier Visits (By Province)

Rank	Province	2018 Ski Resort Amount	2018 Skier Visits (10K)	YOY%	2017 Ski Resort Amount	2017 Skier Visits (10K)
15	Tianjin	13	44	10.00%	13	40
16	Chongqing	16	40	21.21%	14	33
17	Hunan	9	39.3	19.09%	8	33
18	Jiangsu	17	36.8	-5.64%	15	39
19	Guizhou	10	33	10.00%	10	30
20	Hubei	11	24	14.29%	7	21
21	Ningxia	13	20	11.11%	12	18
22	Qinghai	8	12.5	25.00%	7	10
23	Anhui	3	10	0.00%	3	10
24	Yunnan	4	8	100.00%	2	4
25	Guangdong	2	8	166.67%	1	3
26	Guangxi	2	6	0.00%	2	6
27	Jiangxi	2	5	/	0	0
28	Fujian	1	4	33.33%	1	3
	Total	742	1970	12.57%	703	1750

Distribution of skier visits of dry slopes

Province	Annual skier visits	Province	Annual skier visits
Xinjiang	10000	Heilongjiang	37000
Sichuan	85000	Hebei	15000
Shanghai	5000	Guizhou	25000
Shaanxi	10000	Guangdong	135000
Shandong	105000	Gansu	35000
Liaoning	5000	Fujian	15000
Jiangsu	120000	Beijing	125000
Hunan	40000	Anhui	20000
Hubei	65000	Total	852000

Distribution of skier visits of ski Simulators



There are 580,000 skiers visits of ski simulators.

II Characteristics of Skier

Skiers — Meituan, largest life service e-commerce platform in China

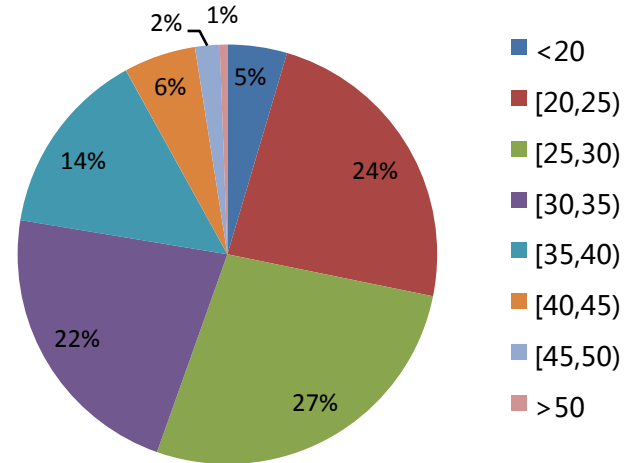
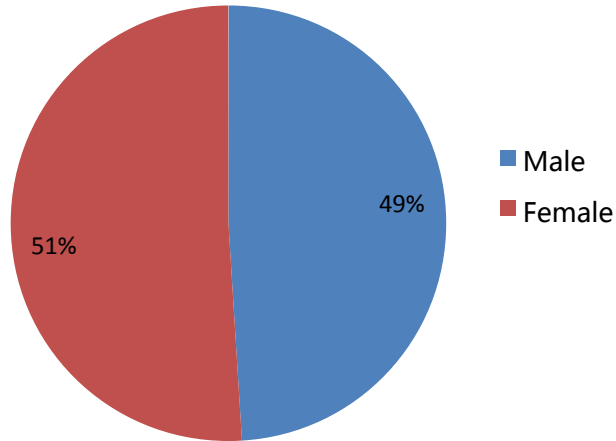
Ski lovers — Data from mobile internet ski service Apps

Outbound skiers — U-tour



II Characteristics of Skier

Meituan — Gender & Age



Meituan — Source and destination

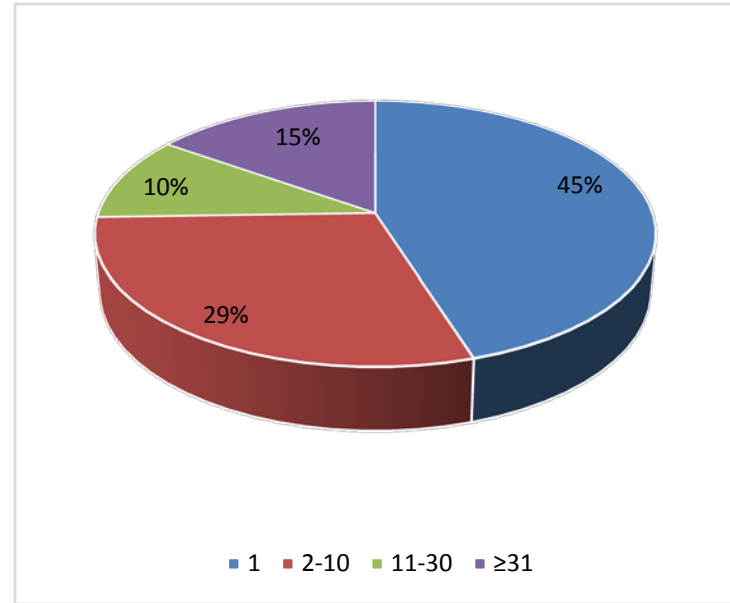
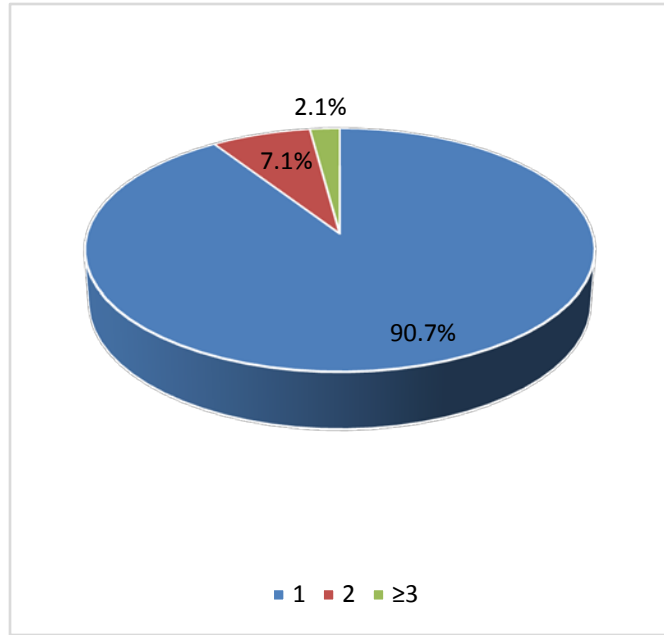
Source top20

Rank	City	Rank	City
1	Beijing	11	Taiyuan
2	Xi'an	12	Zhengzhou
3	Shenyang	13	Lanzhou
4	Tianjin	14	Shijiazhuang
5	Urumchi	15	Harbin
6	Dalian	16	Chengdu
7	Ji'nan	17	Changchun
8	Qingdao	18	Jilin
9	Shenzhen	19	Wuhan
10	Shanghai	20	Hangzhou

Destination top20

Rank	City	Rank	City
1	Beijing	11	Jilin
2	Shenyang	12	Shijiazhuang
3	Xi'an	13	Shenzhen
4	Tianjin	14	Zhengzhou
5	Urumchi	15	Lanzhou
6	Harbin	16	Liupanshui
7	Taiyuan	17	Changchun
8	Dalian	18	Yinchuan
9	Ji'nan	19	Baoding
10	Qingdao	20	Zhangjiakou

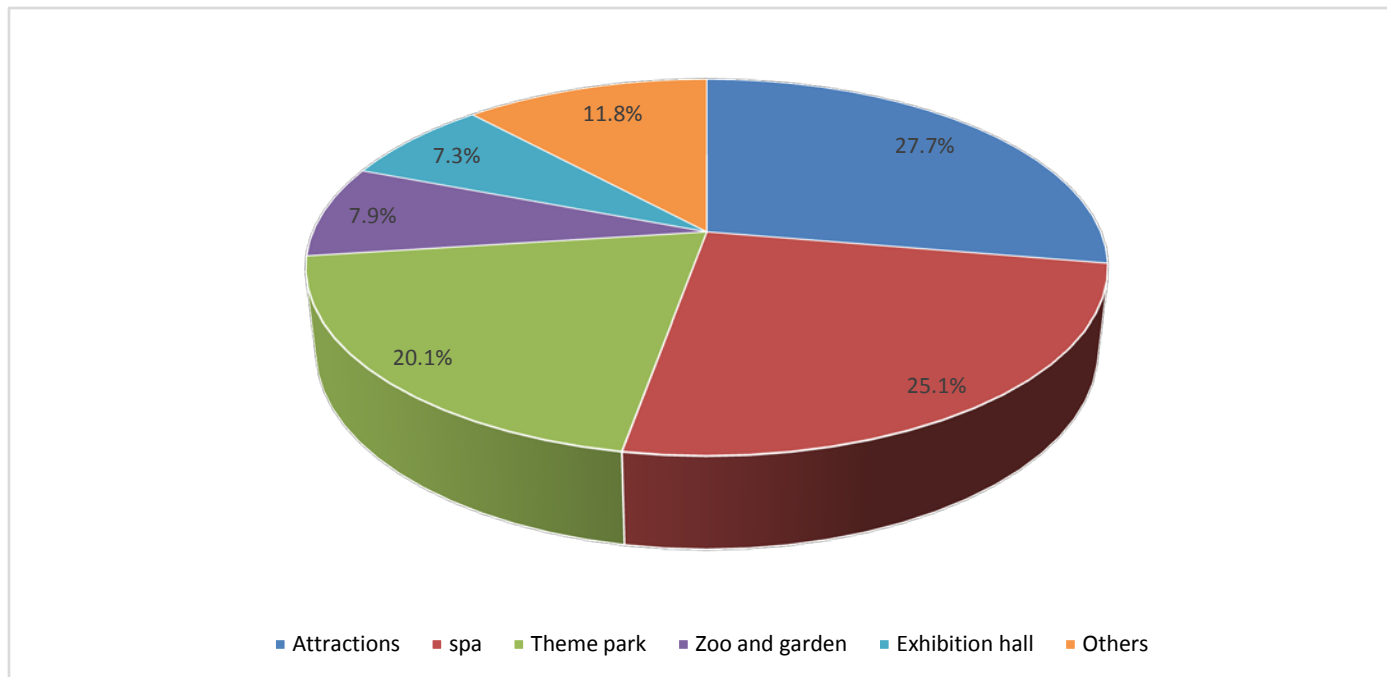
Meituan — purchase times and repurchase interval



Meituan —Ranking of the visitors number

Province	Ranking in 2017	Ranking in 2018	YOY of 2018
Beijing	1	1	5%
Liaoning	2	2	-6%
Shandong	4	3	12%
Shaanxi	3	4	-5%
Hebei	5	5	-6%
Shanxi	7	6	-5%
Tianjin	6	7	-6%
Xinjiang	9	8	25%
Jilin	8	9	-14%
Heilongjiang	12	10	14%

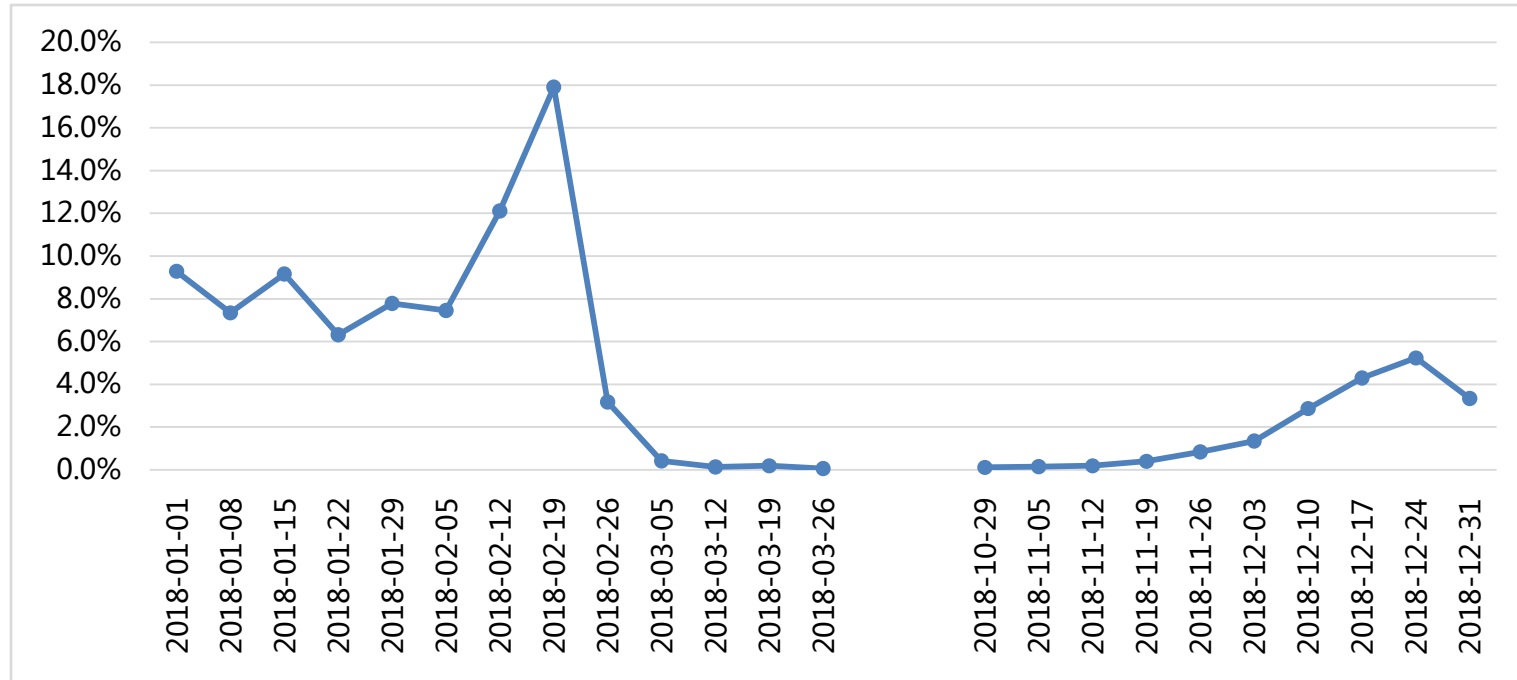
Meituan — Skiing+X



Meituan — Customer review

Review	Proportion	Average Score (out of 5)
Parent-child review	8.2%	3.6
Total	100%	3.7

Meituan — Change trend of passenger flow in snow season (by week)



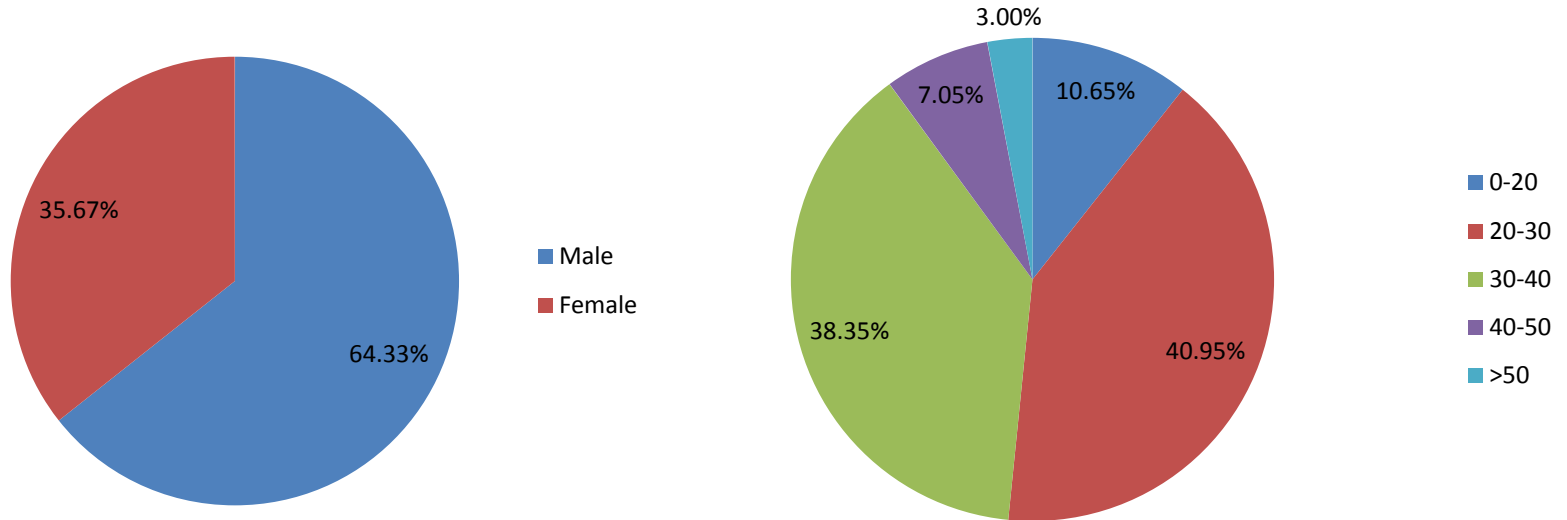
Meituan — Ranking of visitors number

Province	Ranking of ski resorts number	Ranking of visitors number	Province	Ranking of ski resorts number	Ranking of visitors number
Shandong	1	3	Ningxia	16	18
Heilongjiang	2	11	Hubei	17	19
Hebei	3	5	Sichuan	18	16
Liaoning	4	2	Qinghai	19	21
Beijing	5	1	Chongqing	20	24
Jilin	6	8	Hunan	21	22
Henan	7	10	Guizhou	22	15
Inner Mongolia	8	14	Anhui	23	23
Shanxi	9	6	Guangdong	24	17
Xinjiang	10	9	Guangxi	25	27
Shaanxi	11	4	Yunnan	26	26
Tianjin	12	7	Shanghai	27	28
Gansu	13	12	Jiangxi	28	25
Jiangsu	14	20	Fujian	29	29
Zhejiang	15	13	Tibet	30	30

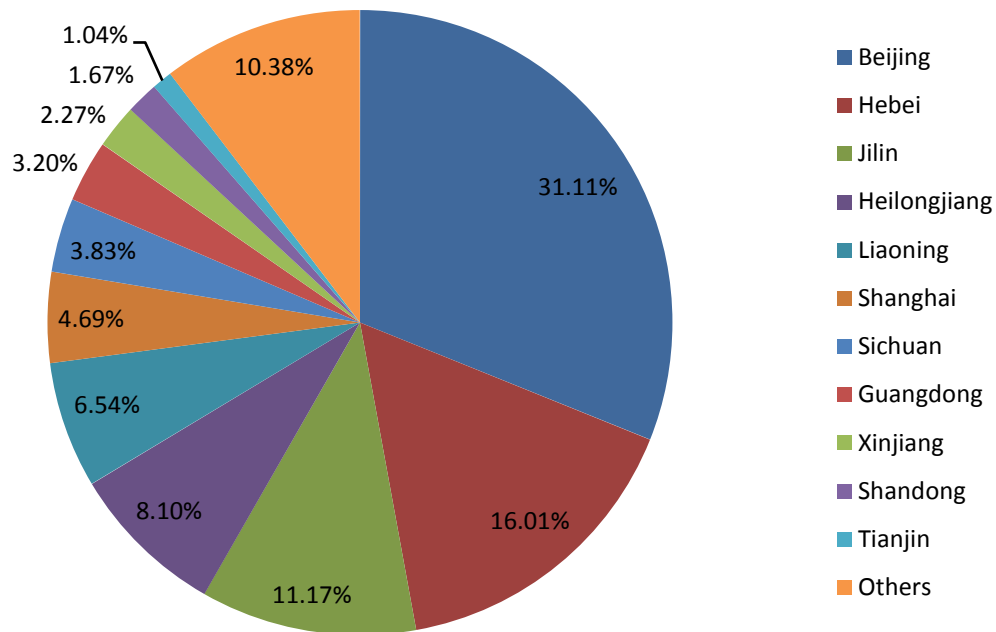
Meituan —Ranking of per capita consumption

Province	Ranking	Province	Ranking
Guangxi	1	Hebei	12
Zhejiang	2	Heilongjiang	13
Guizhou	3	Beijing	14
Hubei	4	Ningxia	15
Sichuan	5	Shaanxi	16
Anhui	6	Jilin	17
Yunnan	7	Qinghai	18
Chongqing	8	Liaoning	19
Xinjiang	9	Shandong	20
Jiangsu	10	Tianjin	21
Gansu	11	Guangdong	22

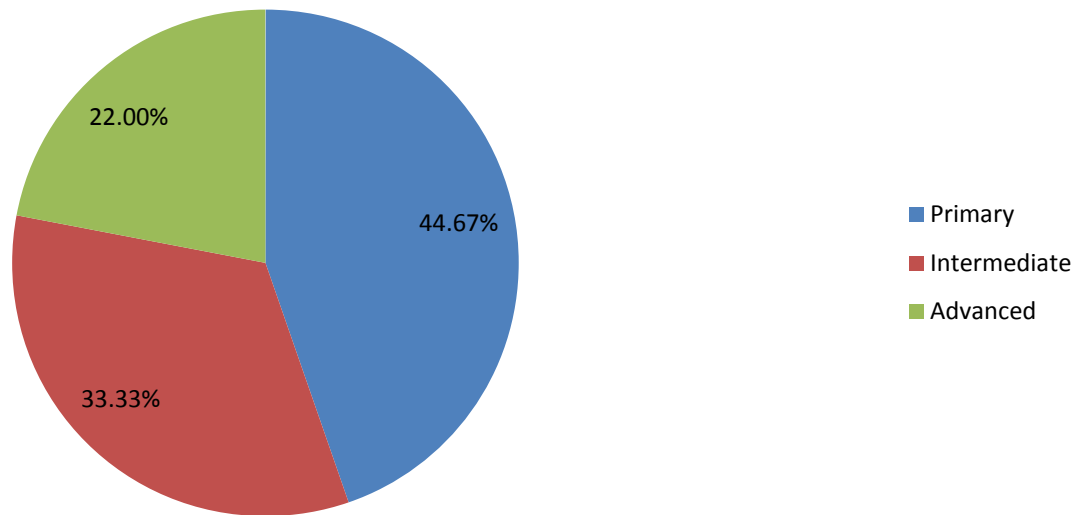
Ski lovers — Gender & Age



Ski lovers — User distribution

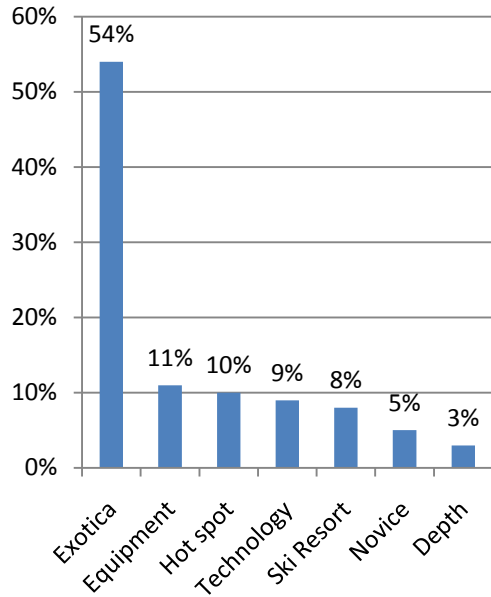


Ski lovers — Skiing level

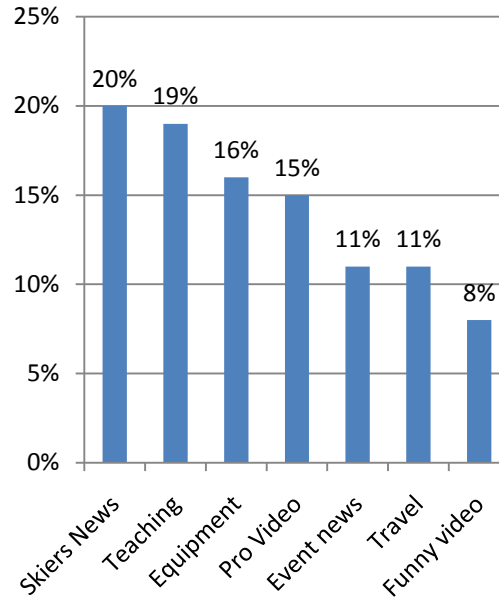


Ski lovers — User focus

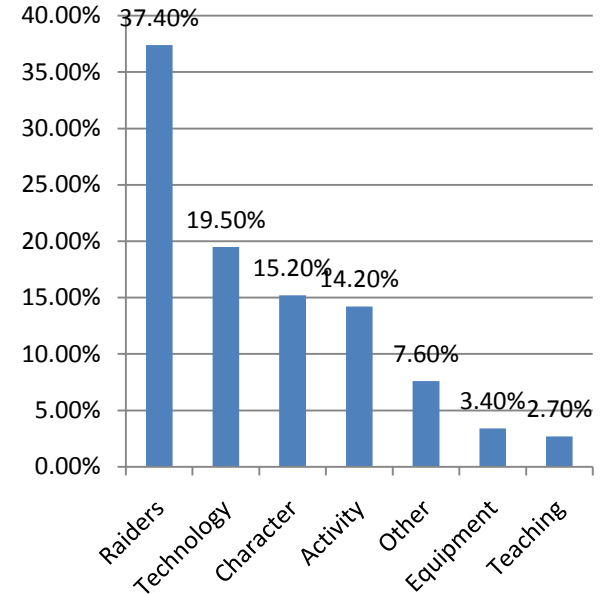
HIGHSNOW



GOSKI



SKI+



Ski lovers — record trace Top 10

HIGHSNOW

Ranking	Ski Resort
1	Vanke Lake Songhua
2	Wanlong
3	Genting
4	Beidahu
5	Thaiwoo
6	Fulong
7	Wanda Changbaishan
8	Nanshan
9	Huaibei
10	Yabuli Sun Mountain

GOSKI

Ranking	Ski Resort
1	Wanlong
2	Genting
3	Fulong
4	Beidahu
5	Vanke Lake Songhua
6	Huaibei
7	Nanshan
8	Wanlongbayi
9	Wanda Changbaishan
10	Thaiwoo

SKI+

Ranking	Ski Resort
1	Wanlong
2	Vanke Lake Songhua
3	Genting
4	Beidahu
5	Yabuli Sun Mountain
6	Thaiwoo
7	Fulong
8	Wanda Changbaishan
9	Cuiyunshan Yinhe
10	Huaibei

Ski lovers — Ski Resorts high praise Top 10

HIGHSNOW

Ranking	Ski Resort
1	Vanke Lake Songhua
2	Wanlong
3	Genting
4	Beidahu
5	Thaiwoo
6	Fulong
7	Wanda Changbaishan
8	Yabuli Sun Mountain
9	Cuiyunshan Yinhe
10	Silkroad

GOSKI

Ranking	Ski Resort
1	Wanlong
2	Wanda Changbaishan
3	Thaiwoo
4	Vanke Lake Songhua
5	Fulong
6	Nanshan
7	Genting
8	Tianchixue
9	Beidahu
10	Yuyang

SKI+

Ranking	Ski Resort
1	Vanke Lake Songhua
2	Wanlong
3	Cuiyunshan Yinhe
4	Beidahu
5	Fulong
6	Wanda Changbaishan
7	Silkroad
8	Yabuli Sun Mountain
9	Thaiwoo
10	Genting

Characteristics of outbound skiers

According to the Outbound Skier Characteristics Report provided by U-tour,

I The number of days of outbound skiing products is 6-8 days, the per capita customer price is 8000-12000;

II The age of the group is between 25-40 years old, the ratio of male to female is 6:4;

III The collection of customers is mainly concentrated in Beijing, Tianjin and Shanghai;

IV Ski destinations are mainly in Japan, exceeding 65%, mainly concentrated in three major destinations: Hokkaido, including Niseko, Furano, Rusutsu, Kiroro, Asahi-dake, etc.; Nagano area: Hakuba, Shiga, Madarao, etc.; Northeast: Appi Kogen, Zao, Shizukuishi, etc.;

Other destinations include Europe and the United States. Europe is dominated by the French Three Valley, followed by Switzerland, Austria, North America and New Zealand.

III Ski equipment of Skier

I In 2018, the sales volume of snowboarders is about **38,000**, which is more than 25% year-on-year. The sales of snowboarders shoes were about **50,000** pairs.

II The annual sales volume of the skis is about **15,000**, which is about 5% year-on-year.

III In 2018, online sales of ski equipment accounted for about one-third of the total, and there is a trend of continued growth.

Summary

China

—— **the biggest beginner ski market in the world!**

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Meituan Attraction Tickets

Research Team of "China Ski Resorts Encyclopedia"

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Zhongxin Tourism

Longzhixun

China Ski Industry Union

Sharing to create value!

Thanks!

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