**Introduction**

**Current Situation**
- More and more ski resorts allow eBikes on their trails
- Increasing importance and recognition on conferences
  - NSAA Downhill Bike Park Summit
  - eBikes part of program for 1st time
  - Integration of eBikes and trail access emerged as one of the major themes of the event
- Survey among ski resorts reveals big interest in topic. All resorts are planning to add eBikes to their experience. (n=10)
- Summer/Fall specific expenditures of ski industry in 2017 increased by 117% YoY

→ Where is the great interest coming from?

**Motivation of Ski Resorts for adding eBikes**

**Status Quo**
- Winter makes-up lion’s share of business for the resorts (e.g. Vail’s winter revenue is 70% of total)
- Summer guests spend less (e.g. Whistler’s average daily visitor spending is $350 in winter and $148 in summer)
- Ski lifts and mountainsides still largely under-utilized during non-winter months

**Target**
- Increase importance of summer months to:
  - Increase revenue
  - Have an insurance policy for low snow or shortened winters
  - Keep staff year-round

**Winter Success Equation of Skiing**

What are the key aspects that make skiing so successful?

![Equation](image)

- Biking is the leading on-mountain activity during summer/fall that provides all key aspects as skiing but a gap remains in terms of broad appeal (demanding climbs require advanced stamina)
- eBikes enable a broader audience to experience and enjoy the mountains on bikes - addressing the issue of broad appeal

**Conclusion**

In order to increase the importance of summer months, smart ski resorts investing in:
- More beginner/intermediate trails
- More trail variety (not just downhill)
- Formalized education programs
- Tours/experiences
- eBikes

**Case Study: eMTBs and Tourism in Europe**

**European Bike Market**
- In 2017, European eBike market volume was ~2.0 million and accounted for 10% of total bicycle market sales
- eBike & eMTB sales played a big role especially in alpine countries

<table>
<thead>
<tr>
<th>eBike share in alpine countries</th>
<th>eMTB share of total eBike sales 2017</th>
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<tr>
<td>0%</td>
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**eBike Tourism in Europe: Success Factors**
- Legislation - Class 1 eBikes are treated as regular bikes
- Bike Hotels especially catering the needs of bike tourists
- Charging infrastructure (149 stations operated by Bosch)
- Safety & Education - specifically trained tour guides, rental locations, etc. to better instruct consumers

**Successes of eBike Tourism in Europe**
- Cycle tourism in Germany grew by 30% since 2014
- In Switzerland, the number of eMTBs rented doubled between 2016 and 2017
- 60% of rental bikes in French alpine area were electric (2018)
- eBikers are 3 times more likely to bring their family than bikers

**Summary & Key Takeaways**
- Ski resorts looking to establish year-round operations
- Biking has the best chance at ski like appeal – especially eBikes address a broader audience
- Ski resorts focusing on (e)Biking as this promises the most success corresponding to skiing
- Bike tourism in Europe proves the high potential – in order to foster that, US ski resorts must invest and establish success factors and trail access for eBikes
- Spread of eBikes leads to a Win-Win-Win situation for tourists, ski resorts and local communities

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