



World overview of ski resorts

OITAF Congress 2011
Rio de Janeiro – 25.10.2011

LV/09/08/2011



Agenda

- **State of the industry**
 - Picturing present situation
- **Recent evolution in attendance**
 - A view on the demand side
- **Recent evolution in lifts**
 - A view on the supply side



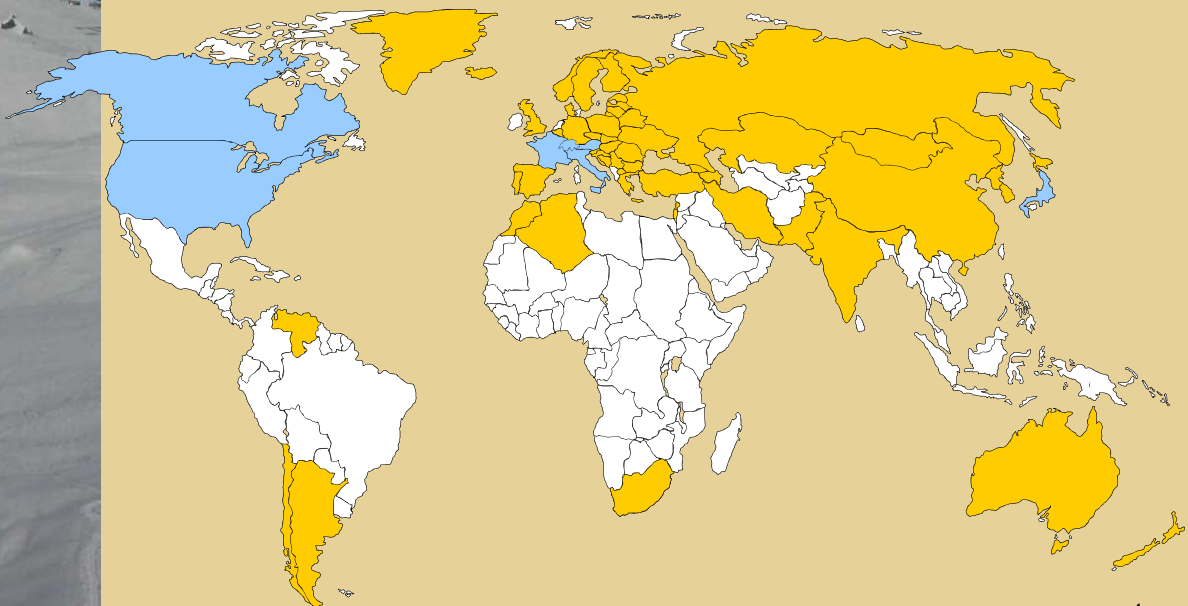
The state of the industry today

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The world ski market

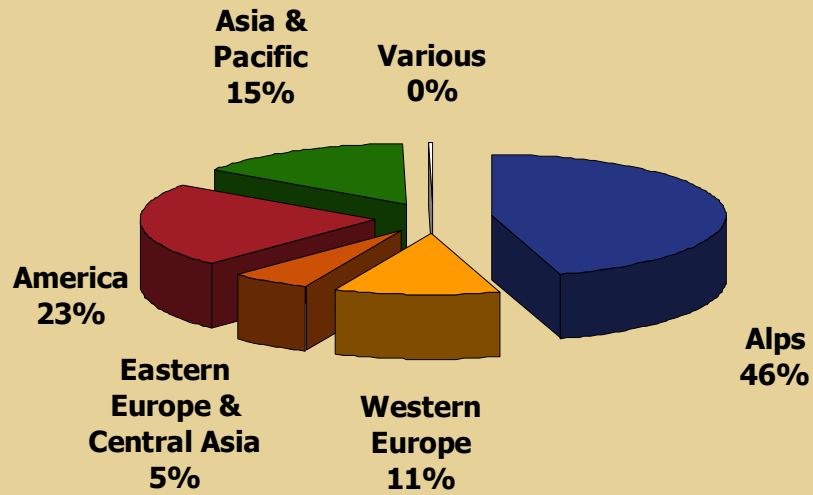
80 countries	2'000 ski resorts
6'000 places of practice	27'000 lifts





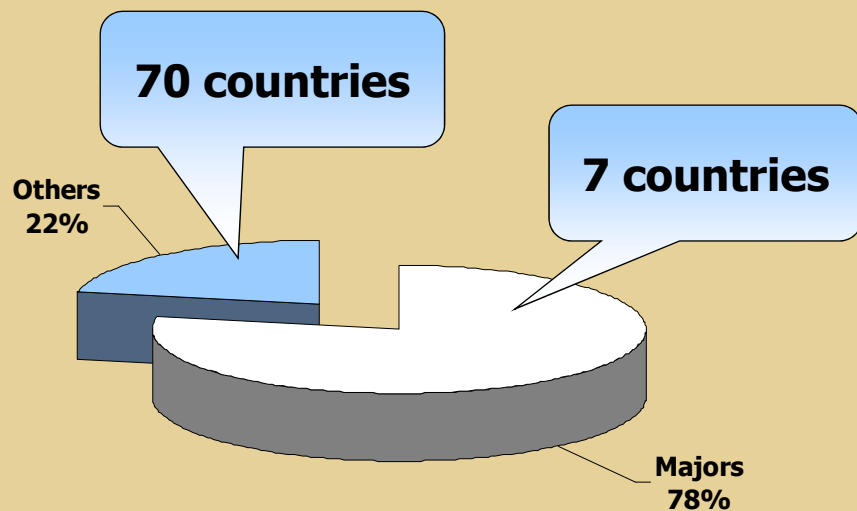
The world ski market

- Market share in the worldwide skier visits (**400 million yearly skier visits**)



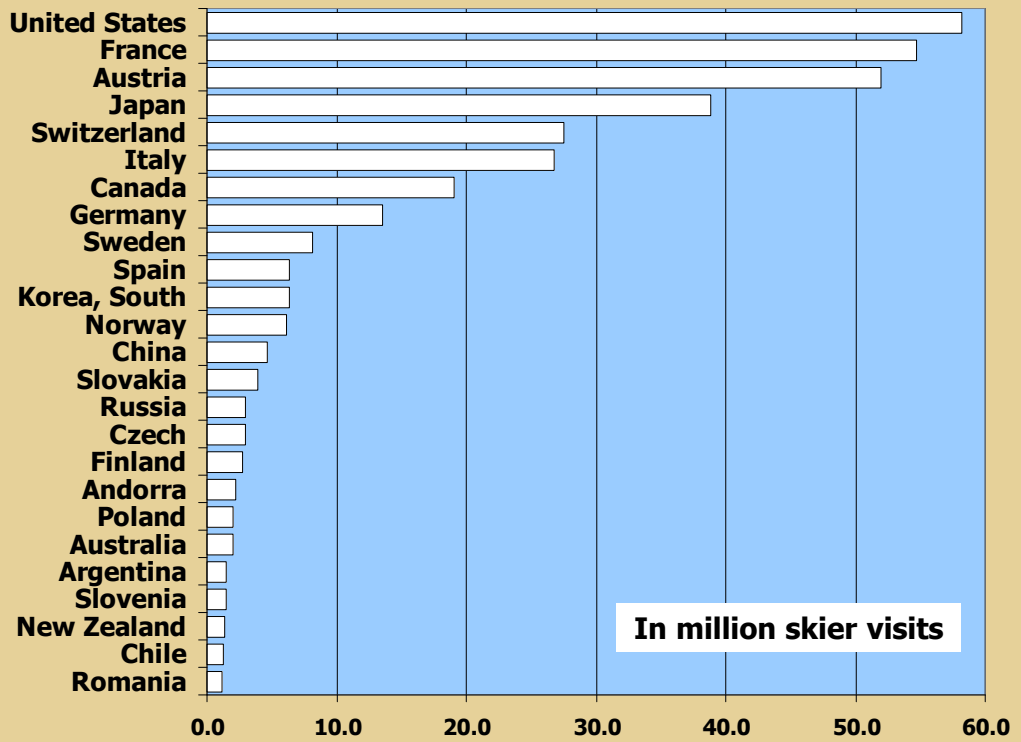
Major players (countries)

- A limited number of countries concentrate most of the attendance





Top countries in the world



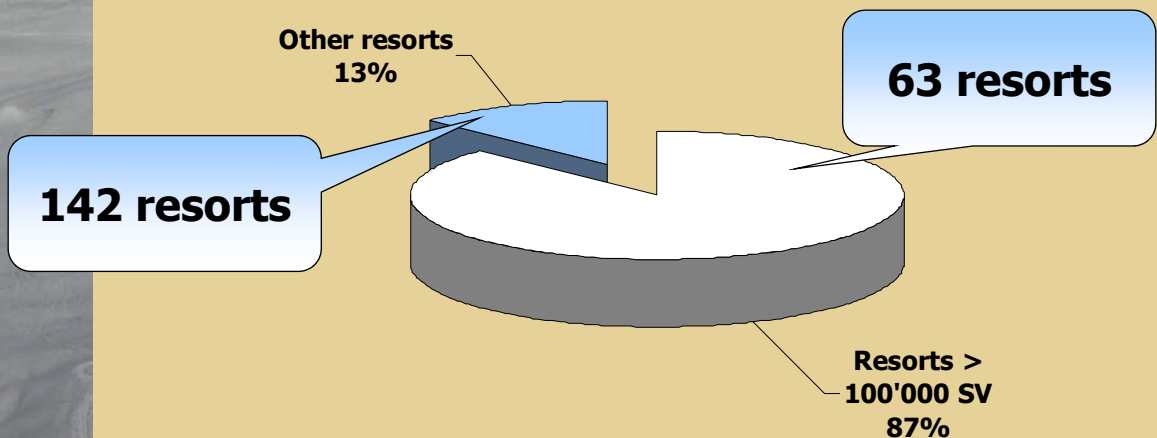
In million skier visits



Major players (resorts)

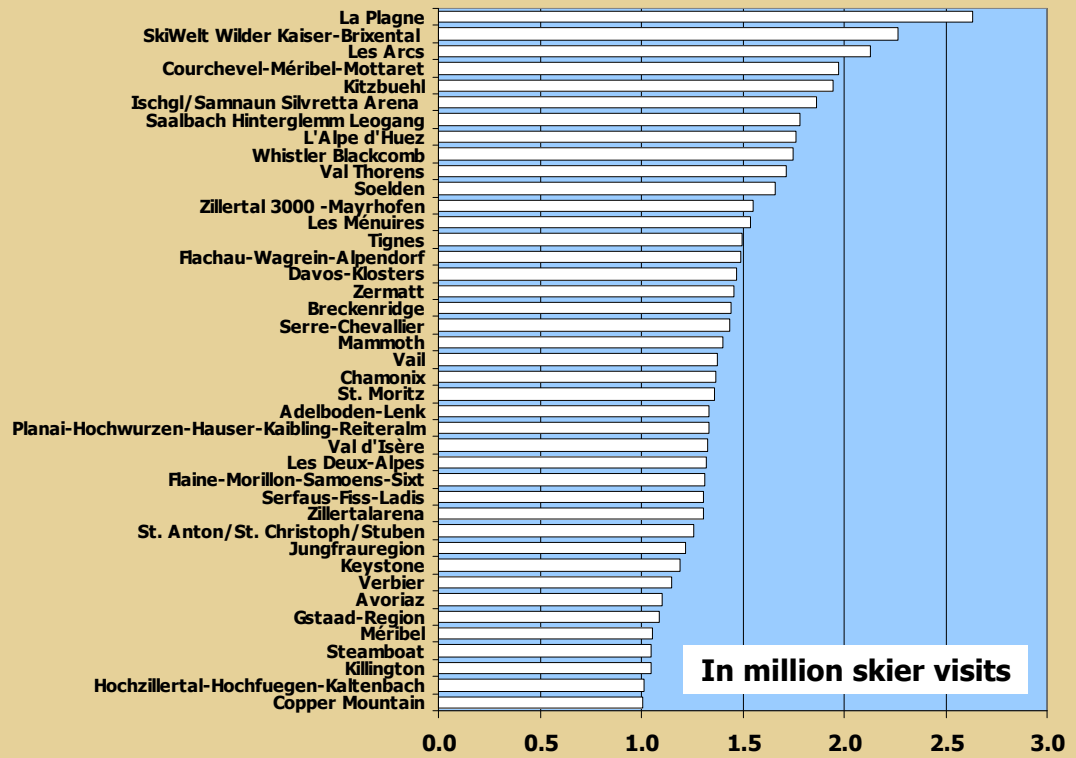
- At national level, a limited number of ski areas concentrate most of the attendance

Example : Switzerland



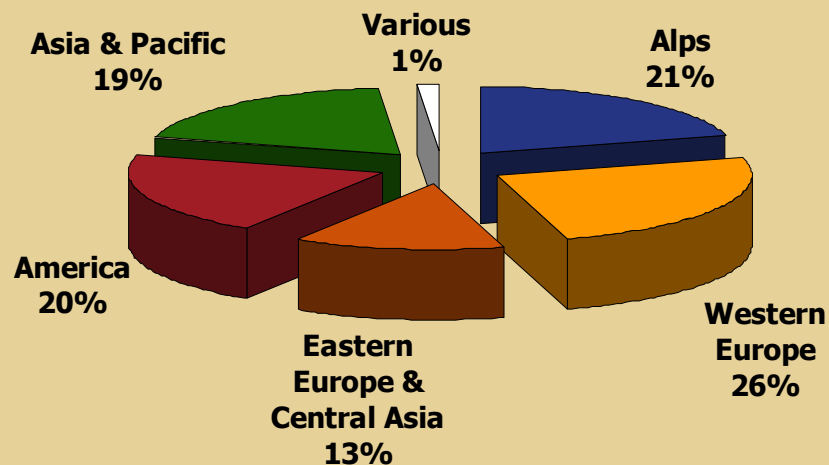


Top resorts of the world



Who are the skiers ?

- Spread of the skiers upon country of origin (**110 million skiers estimated worldwide**)

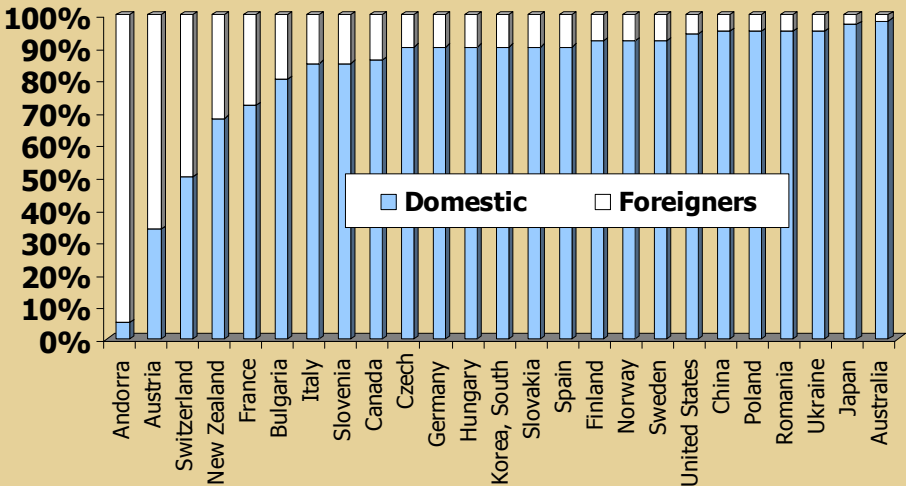




National skiers

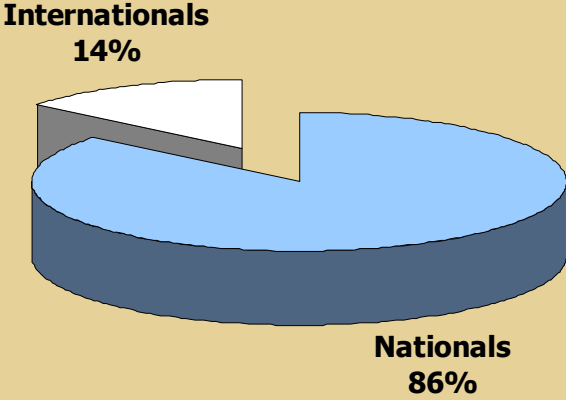
- Strength of **national customer base** of most of the big players. Foreign visitors concentrate on a few top international resorts.

Share of foreign visitors



National vs international

- Share in the **number of skiers** of foreign visitors is less than one sixth of total attendance



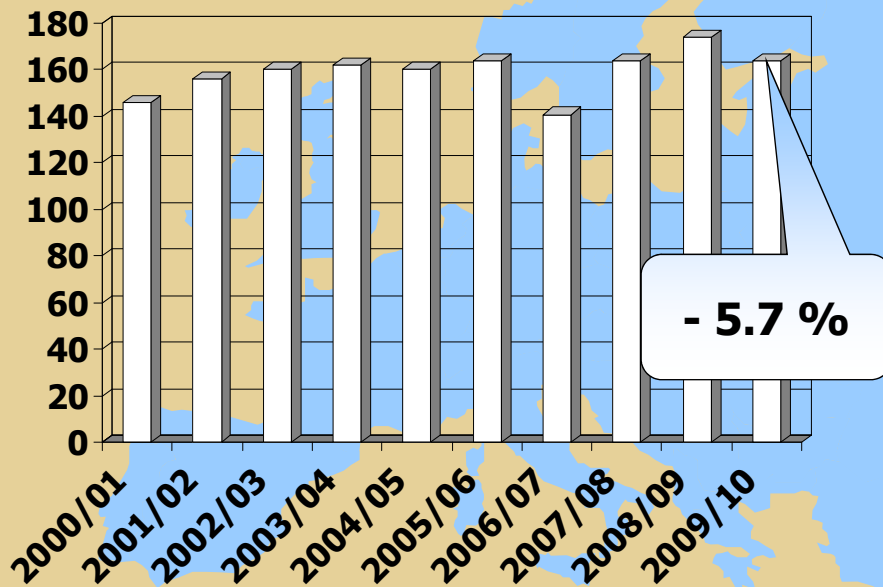
Recent evolution in attendance

A view on the demand side

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Europe - Alps

Skier visits (million)

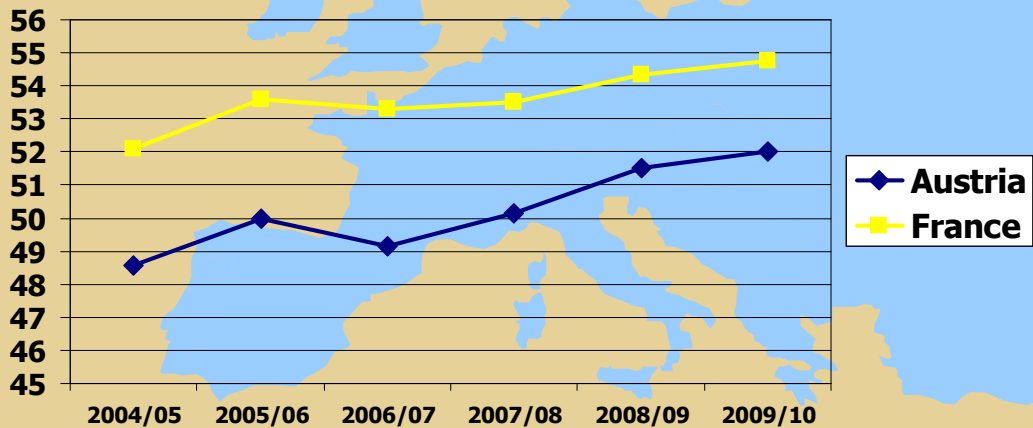




Europe - Alps

- Attendance is still on a growing trend in some countries

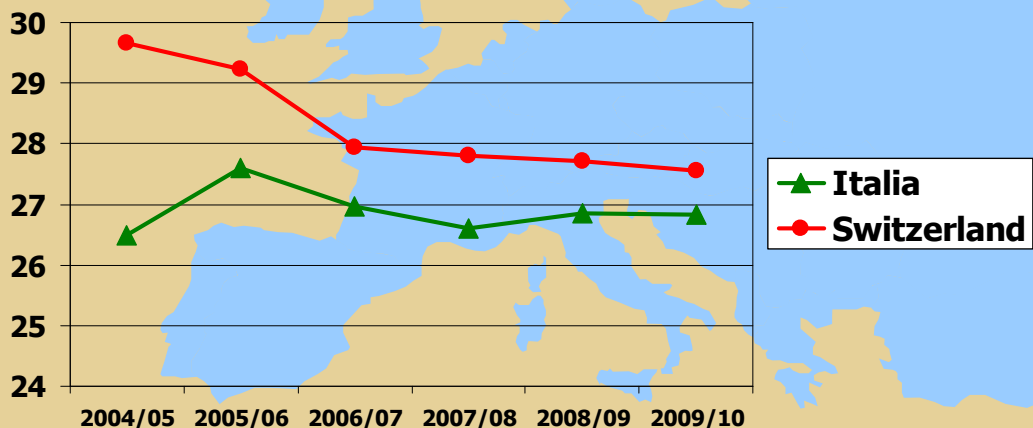
Evolution of the 5 years average attendance (million skier visits)



Europe - Alps

- ... while on a rather declining trend in some others

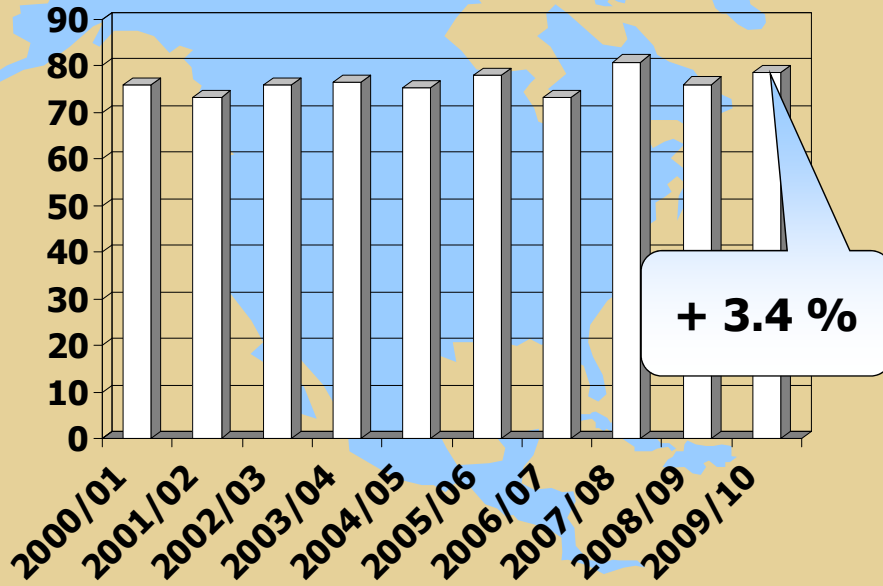
Evolution of the 5 years average attendance (million skier visits)





North America

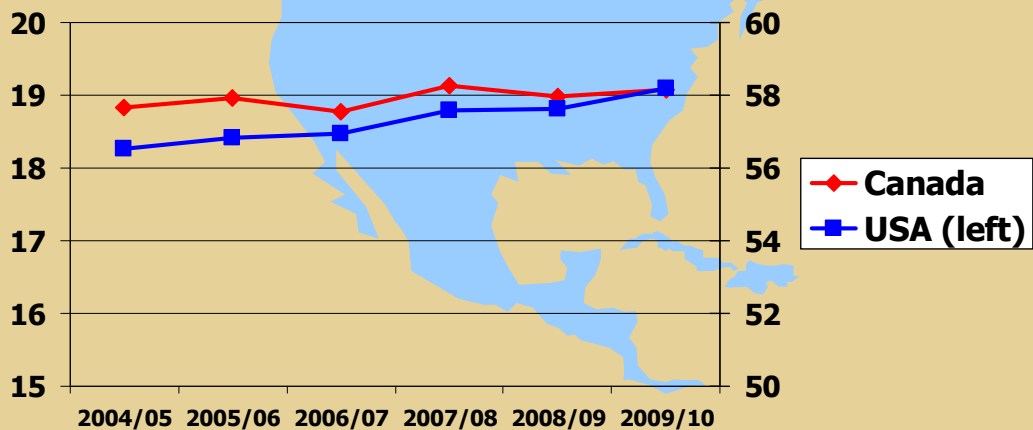
Skier visits (million)



North America

- Mature markets; USA however successfully fighting against decline in visitation

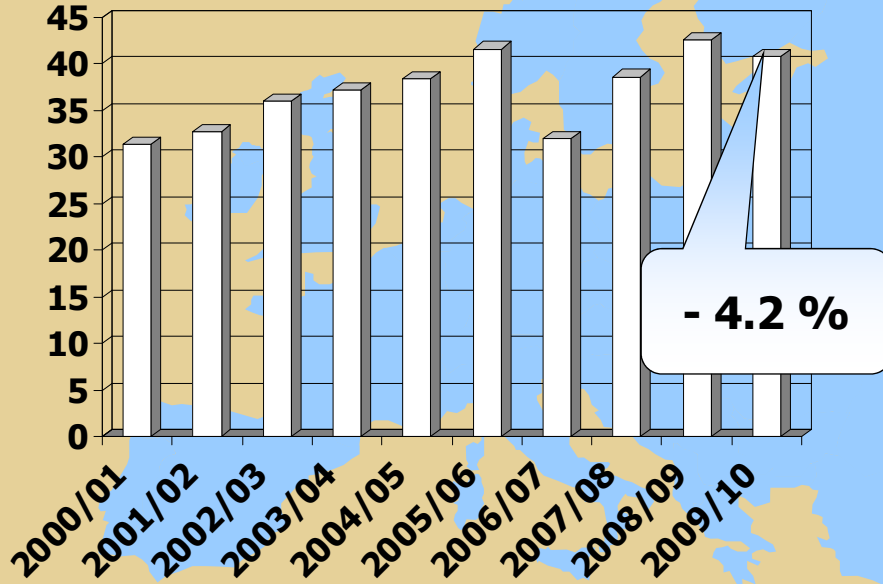
Evolution of the 5 years average attendance (million skier visits)





Europe – Other western countries

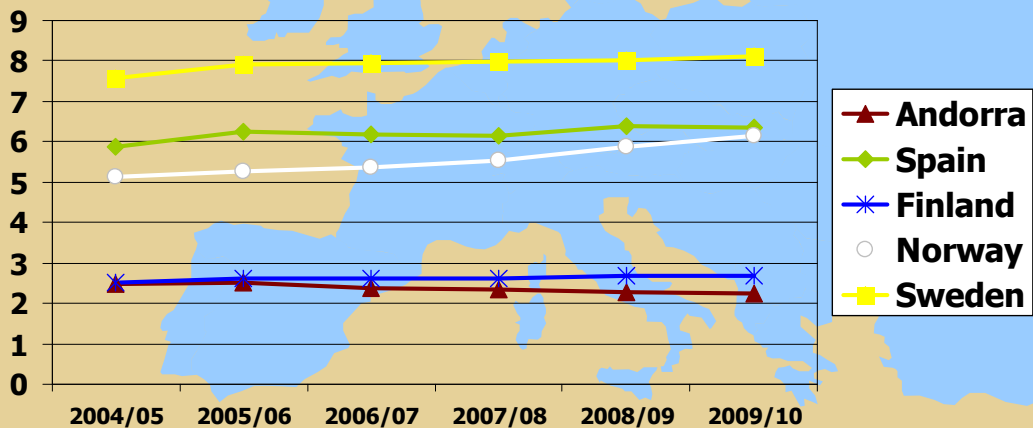
Skier visits (million)



Europe – Other western countries

- Norway still showing some real growth trend, while Andorra suffering

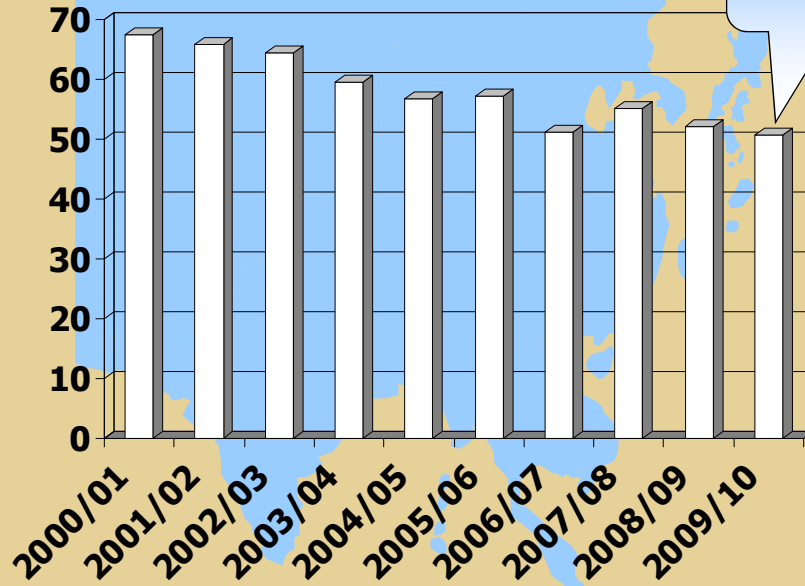
Evolution of the 5 years average attendance (million skier visits)



Asia - Pacific



Skier visits (million)

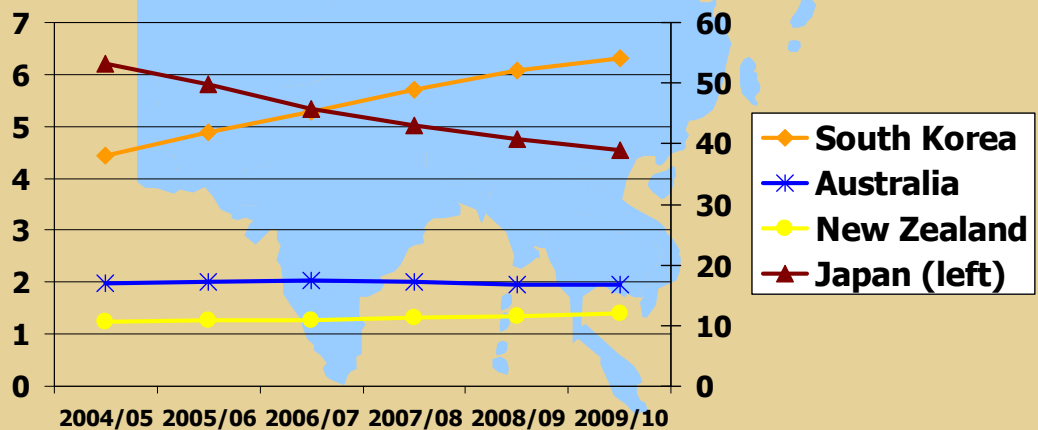


Asia - Pacific



- Decline in Japan, growth in South Korea, maturity in Australia / New Zealand

Evolution of the 5 years average attendance (million skier visits)





Recent evolution in lifts

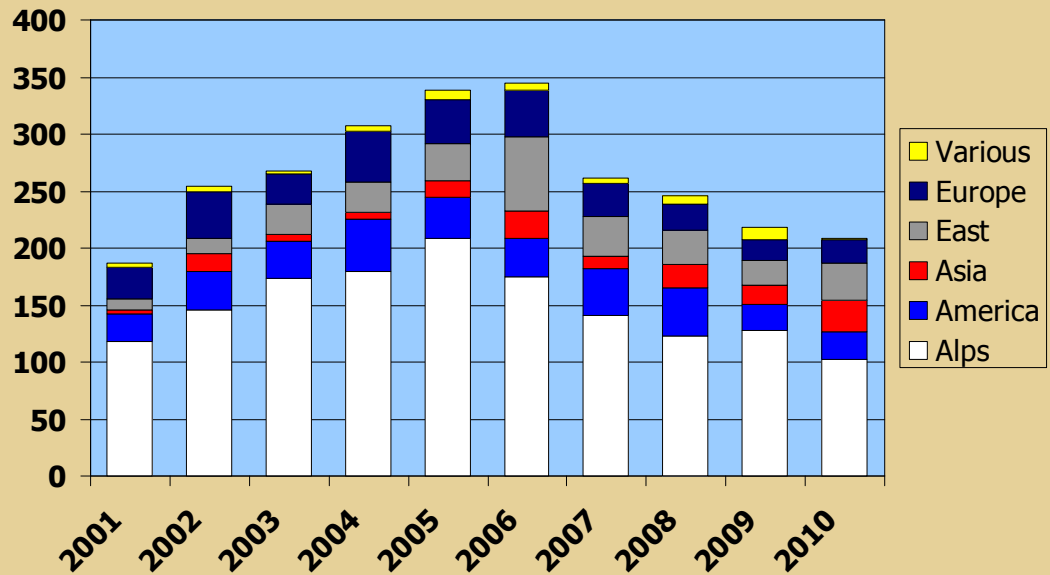
A view on the supply side

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New lifts

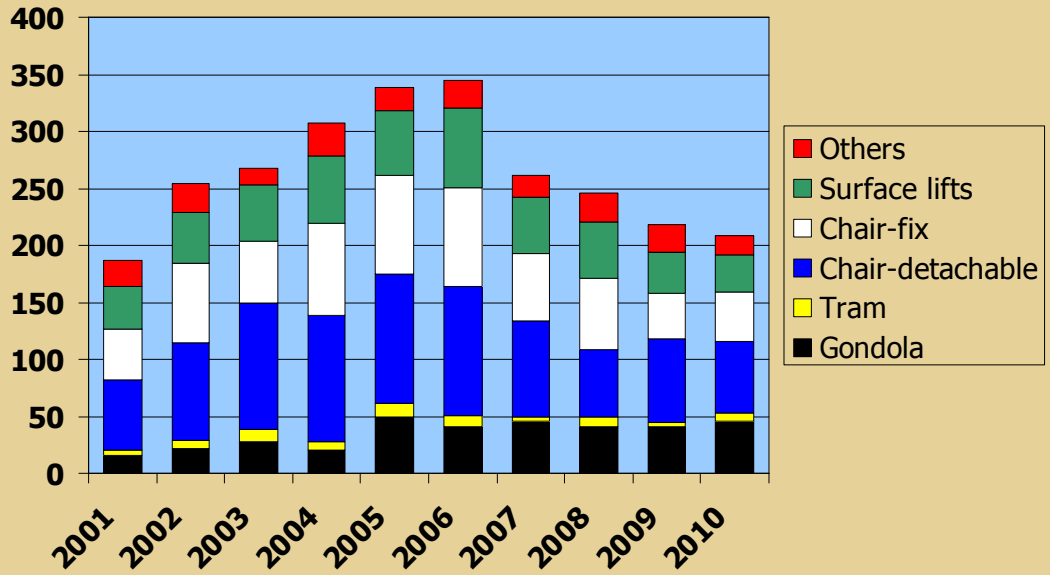
New lifts deliveries by regions



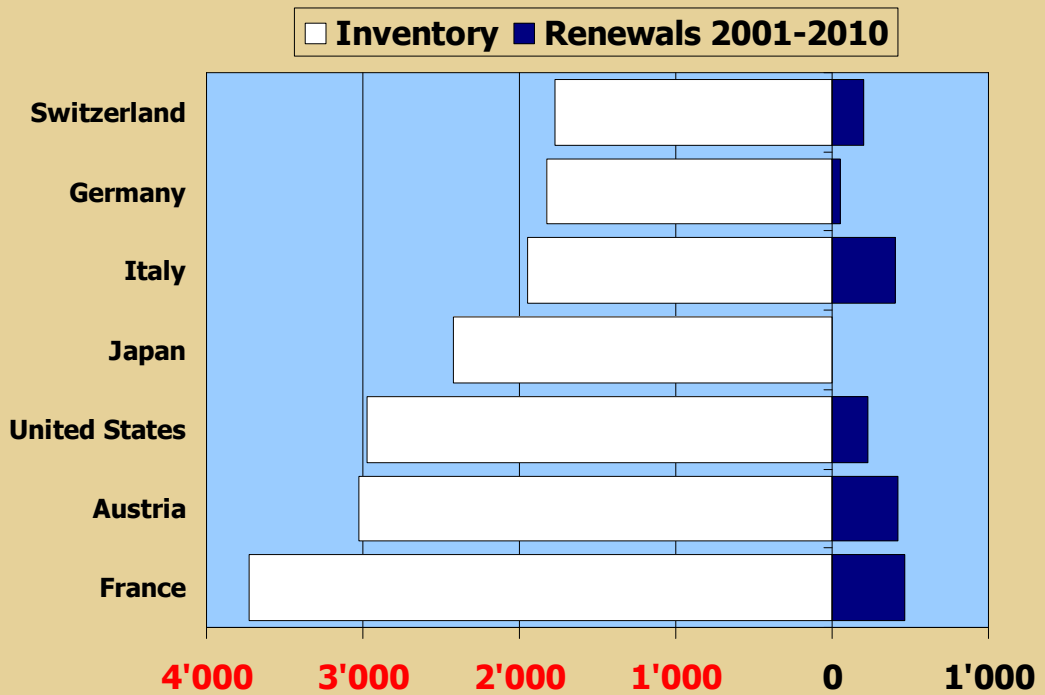


New lifts

New lifts deliveries by lift type

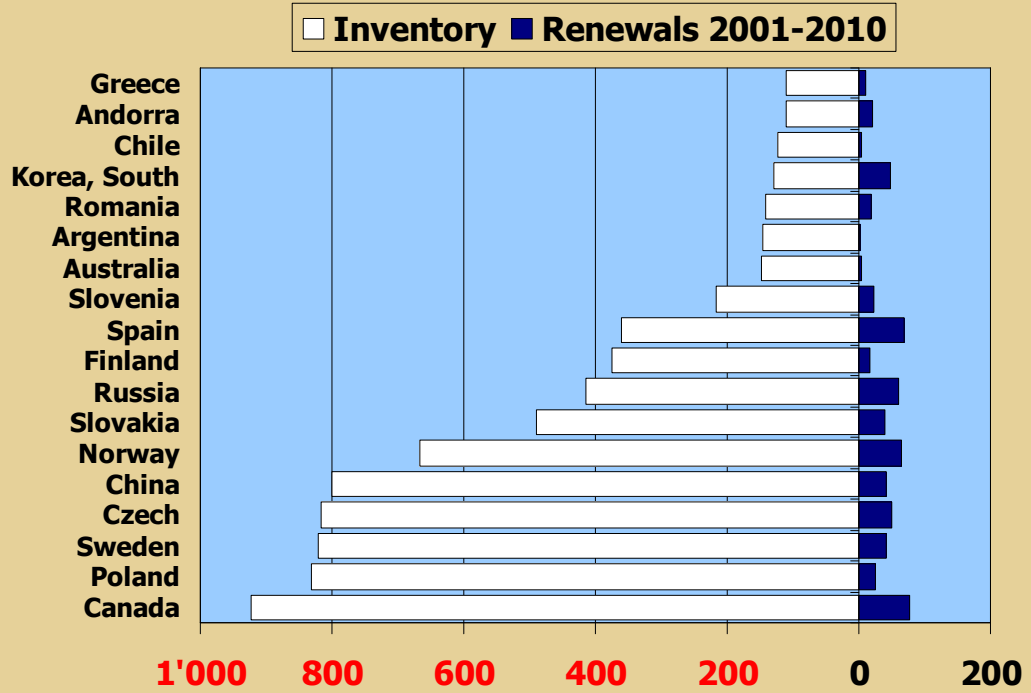


Lifts - evolution



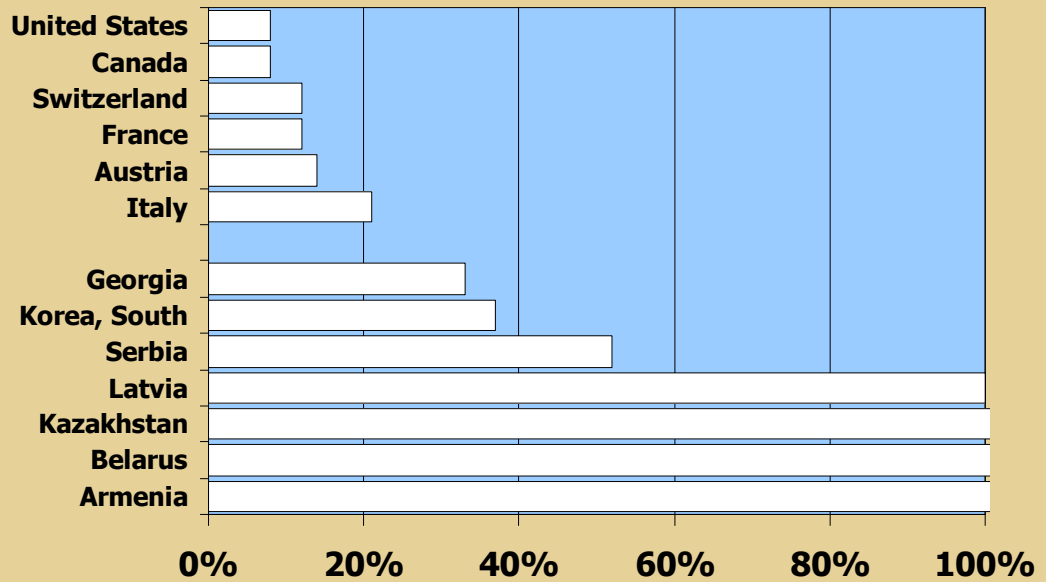


Lifts - evolution



Lifts - evolution

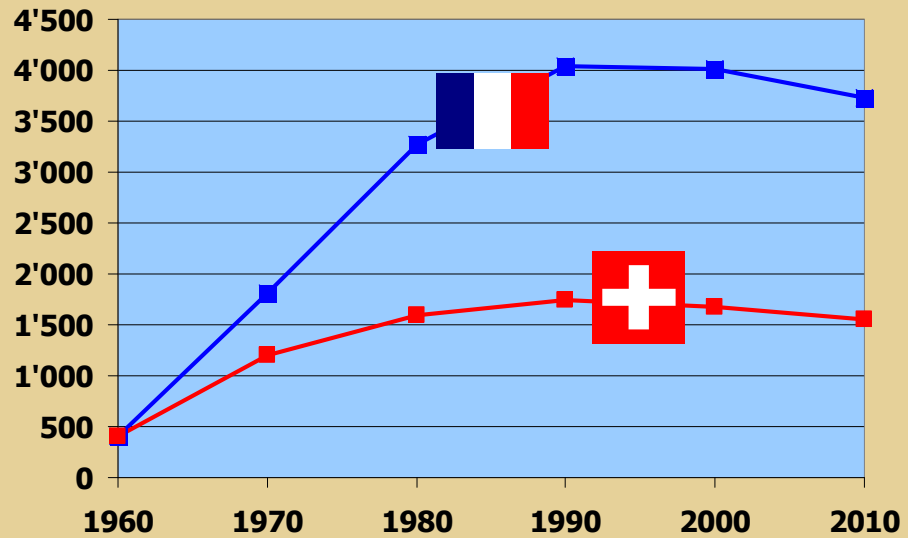
2001-2010 renewal rate





Lifts : less but better

Evolution of the number of lifts in France and Switzerland



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Further reference

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