



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

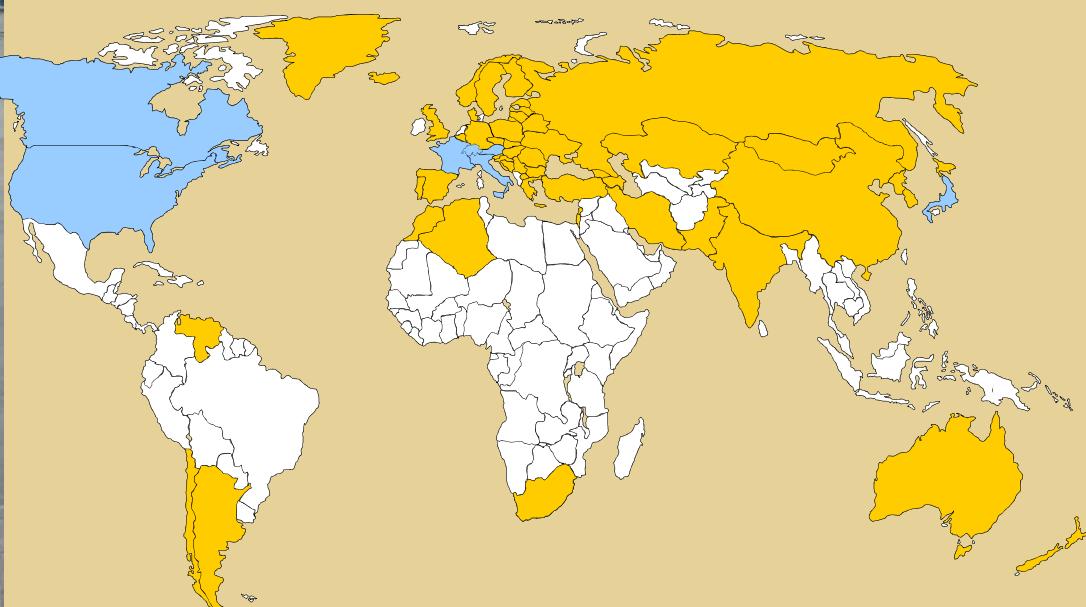


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The world ski market

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

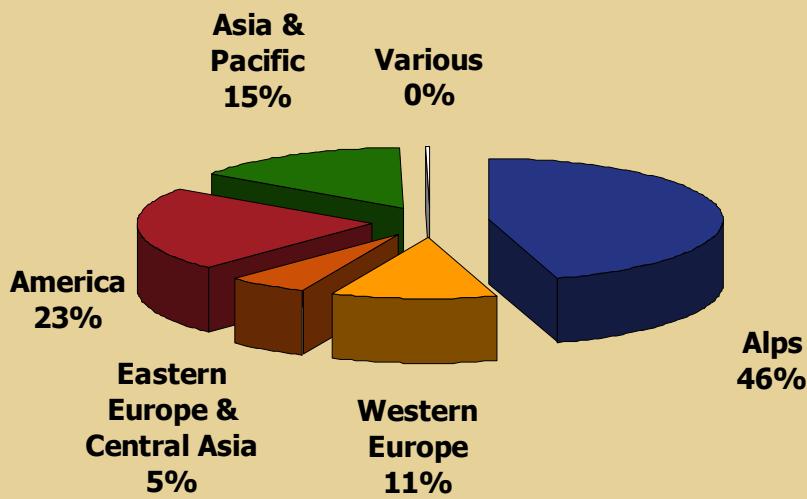




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The world ski market

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



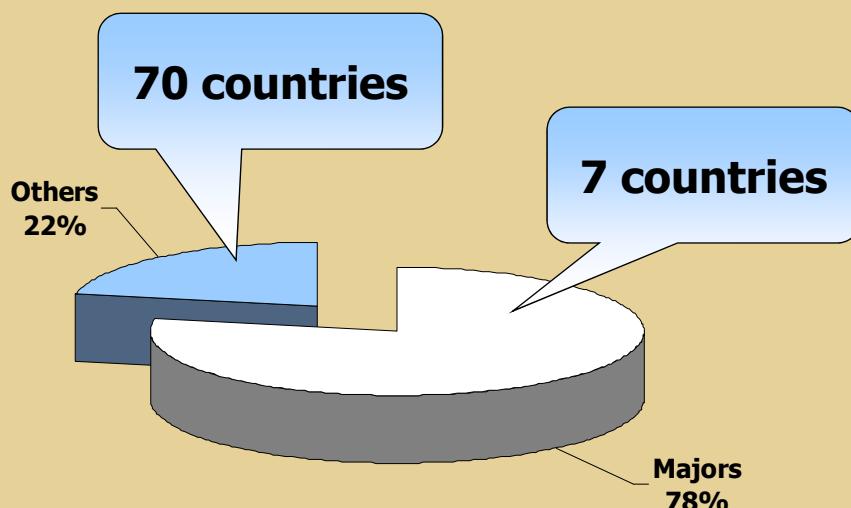
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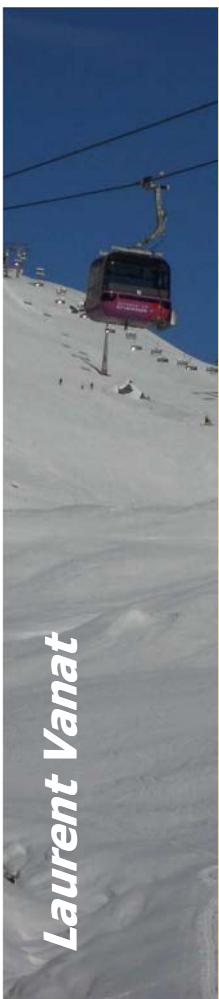
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Major players (countries)

- A limited number of countries concentrate most of the attendance

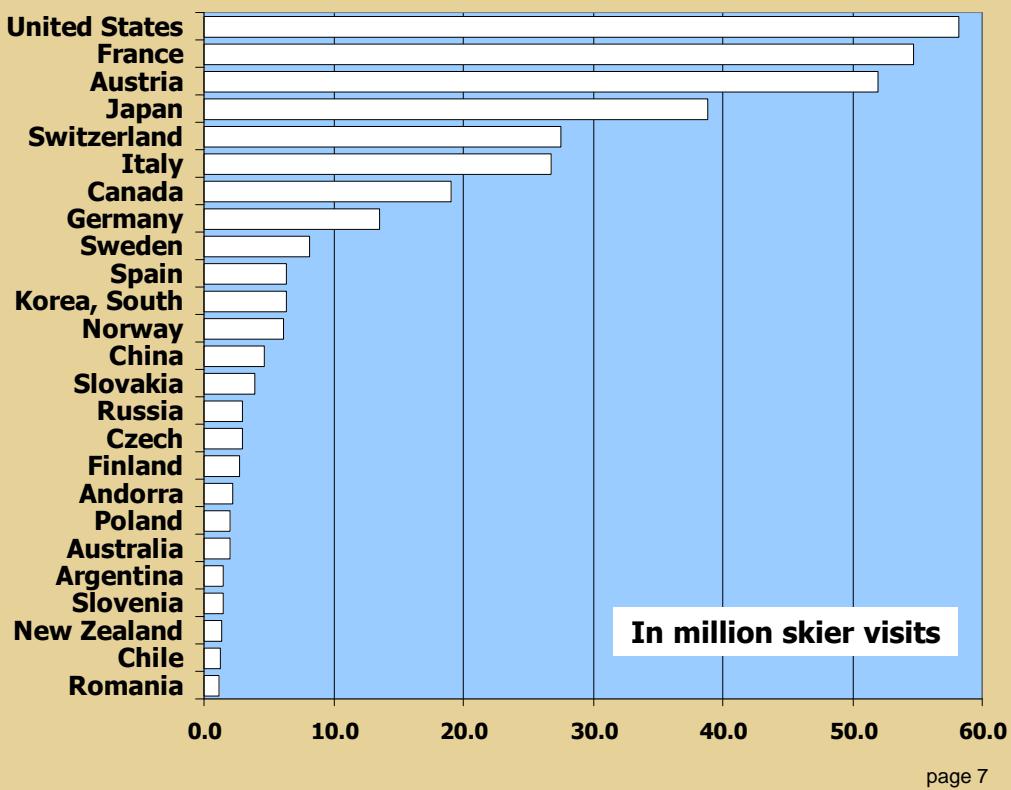


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Top countries in the world



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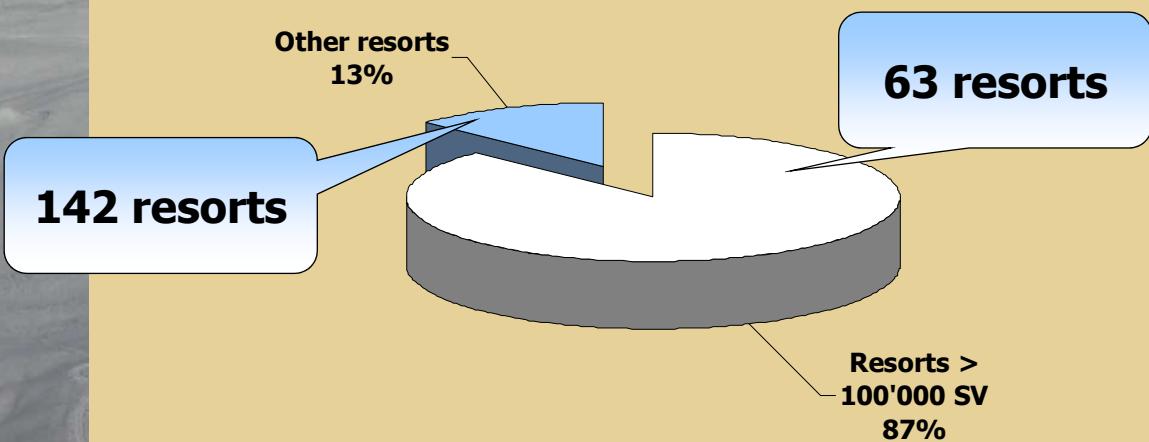


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Major players (resorts)

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

Example : Switzerland

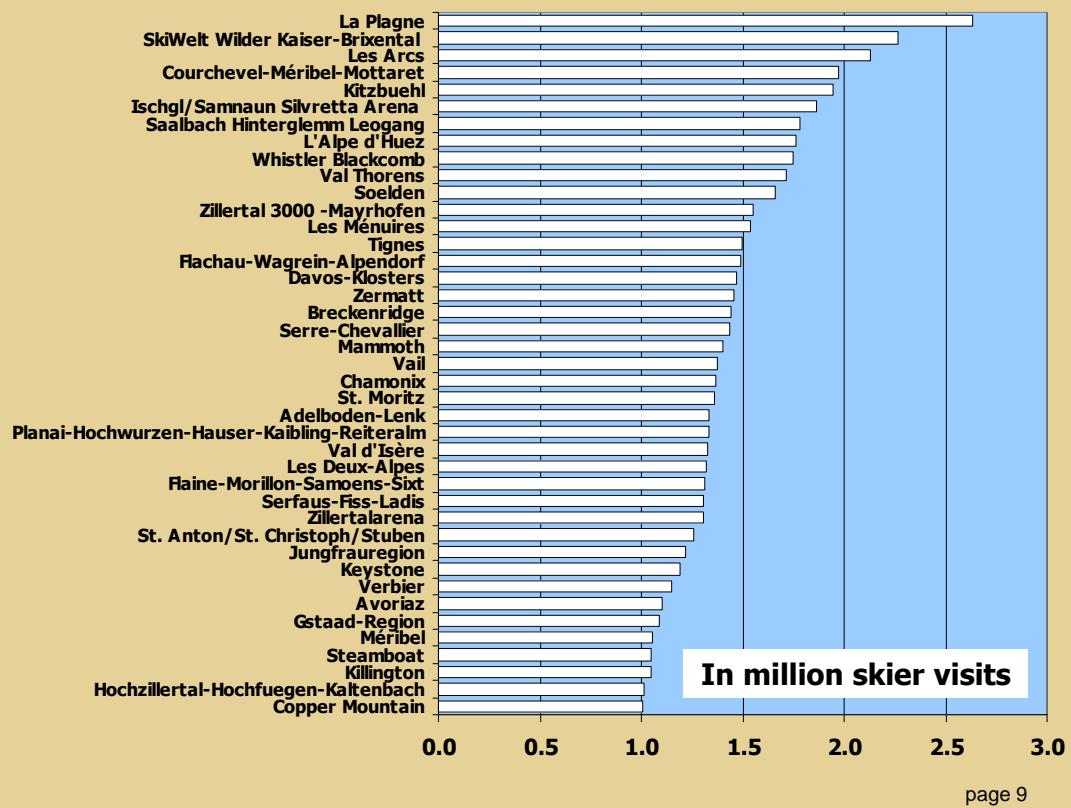


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Top resorts of the world



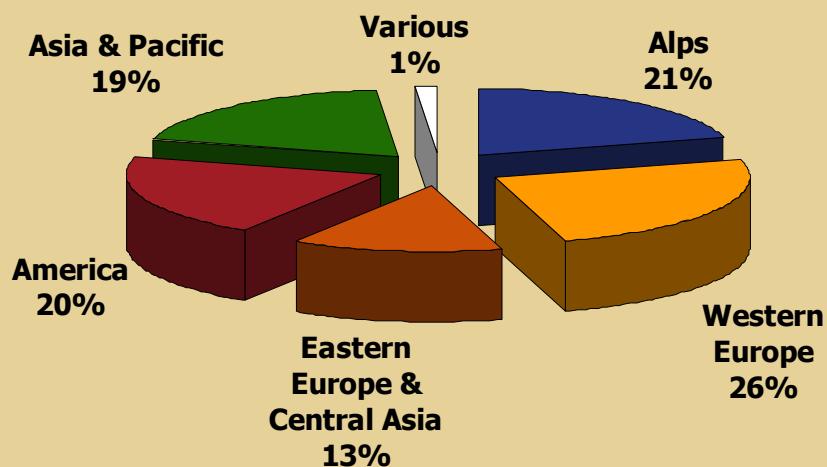
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Who are the skiers ?

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



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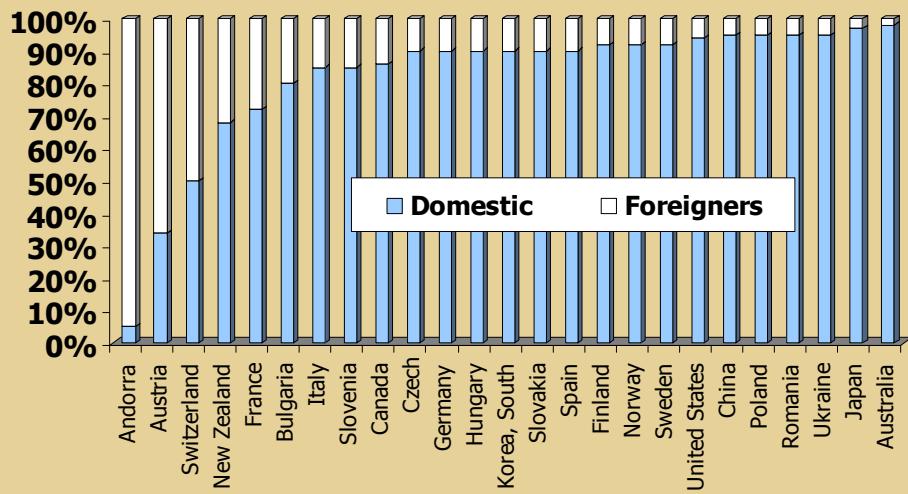


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National skiers

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

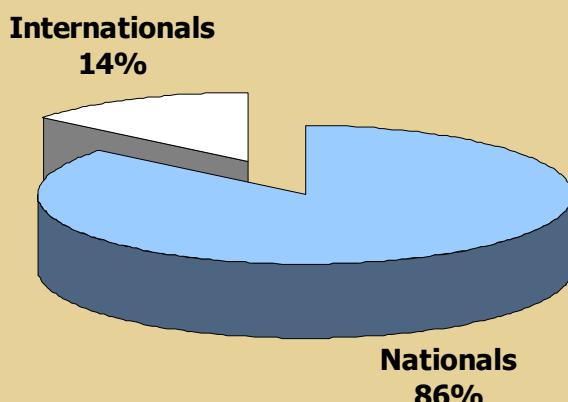
Share of foreign visitors



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National vs international

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



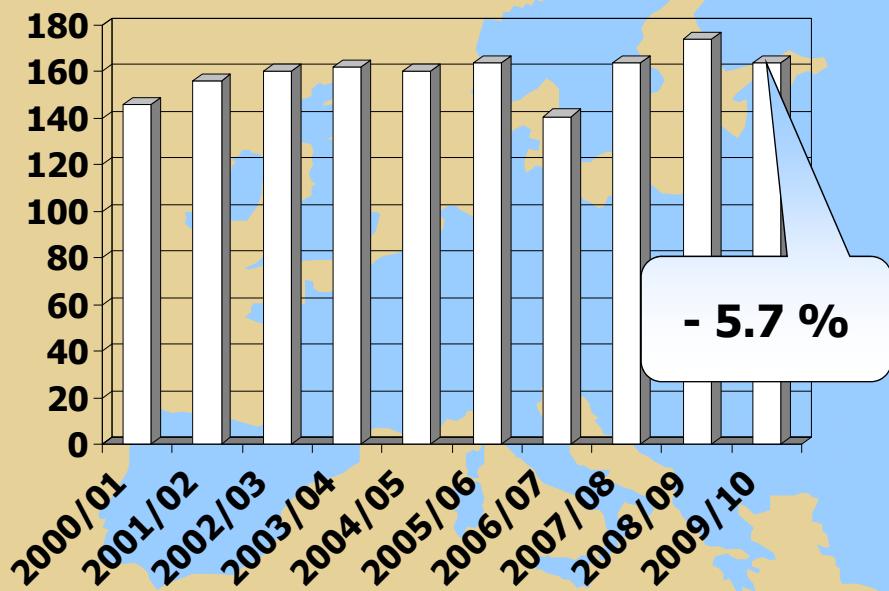
Recent evolution in attendance

A view on the demand side

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Europe - Alps

Skier visits (million)



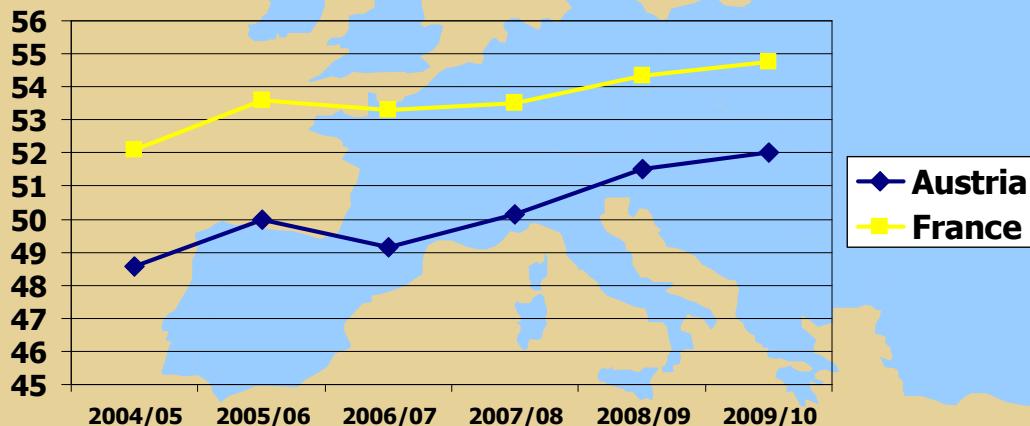


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Europe - Alps

- Attendance is still on a growing trend in some countries

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



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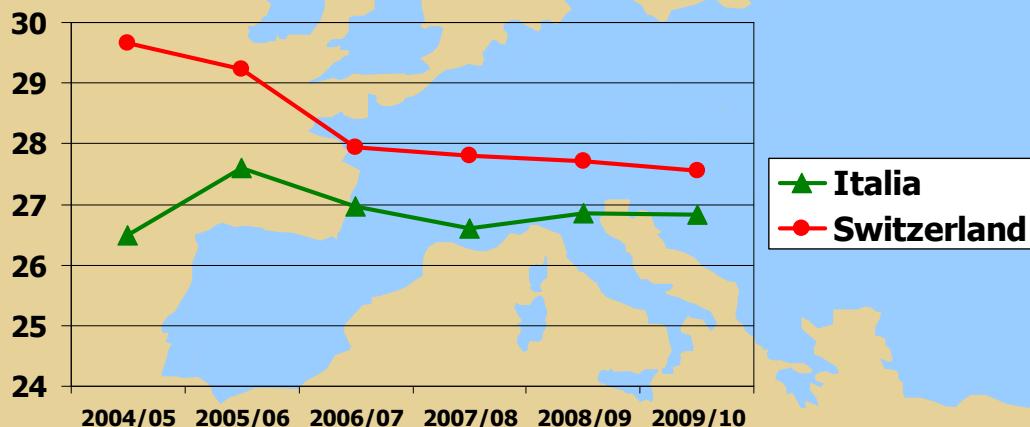


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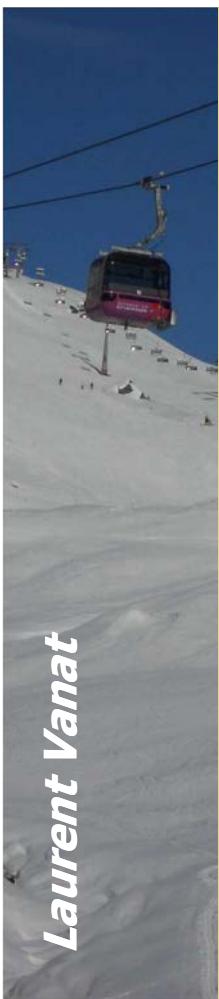
Europe - Alps

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

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

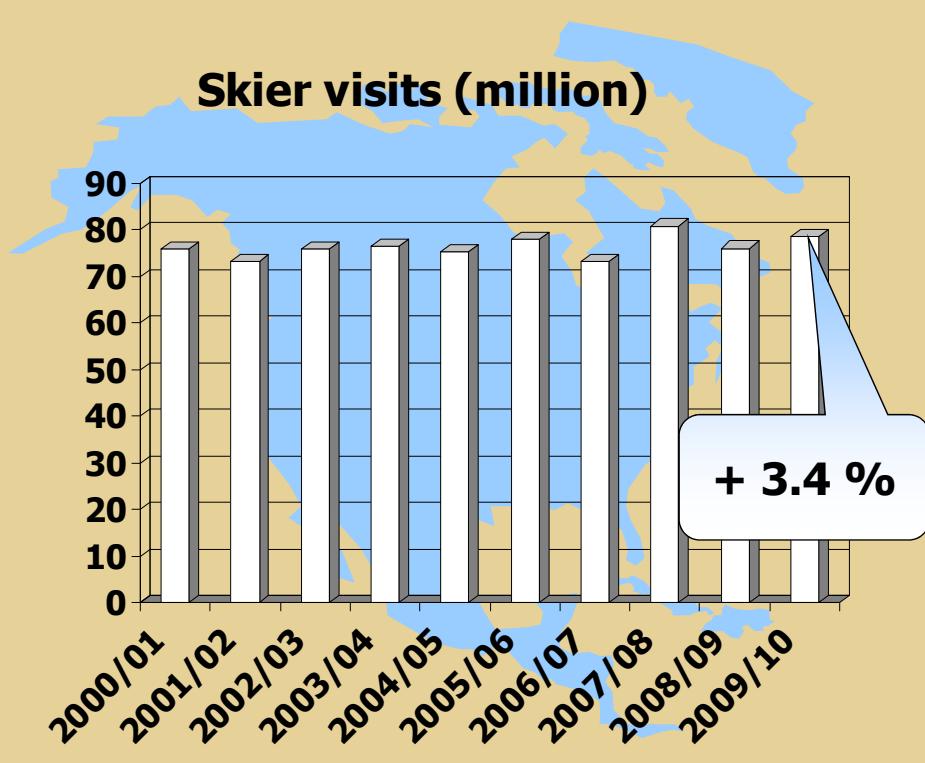


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North America



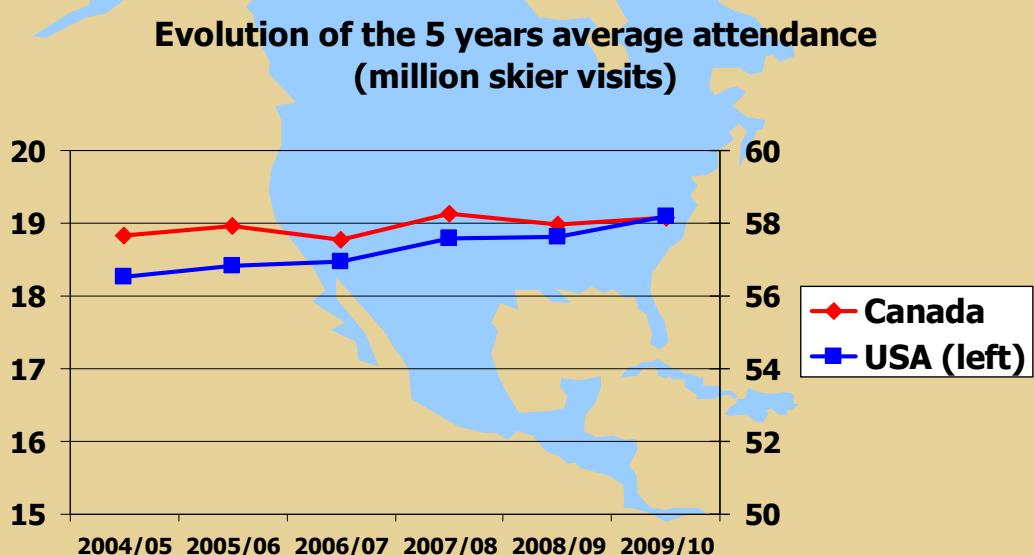
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North America

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



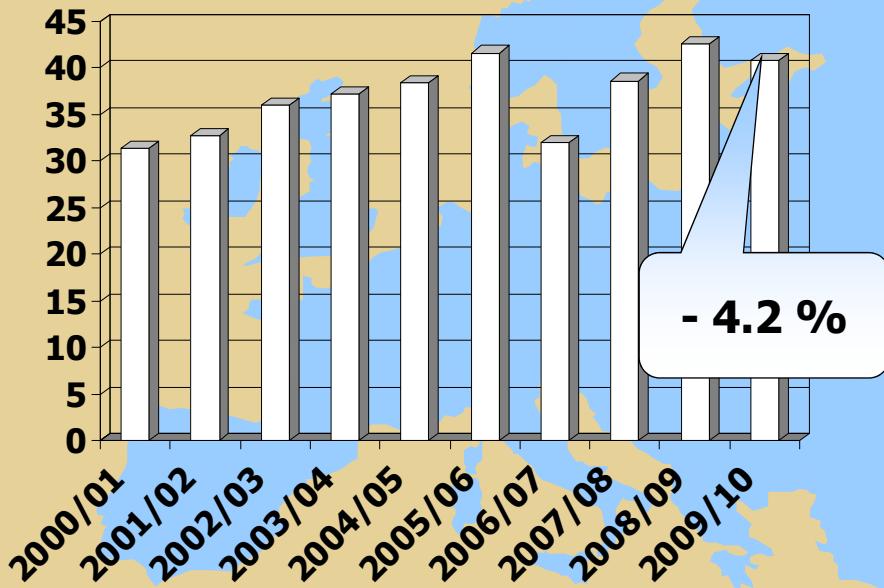
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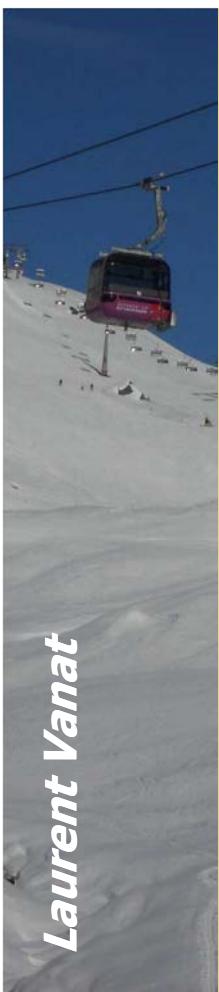
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Europe – Other western countries

Skier visits (million)



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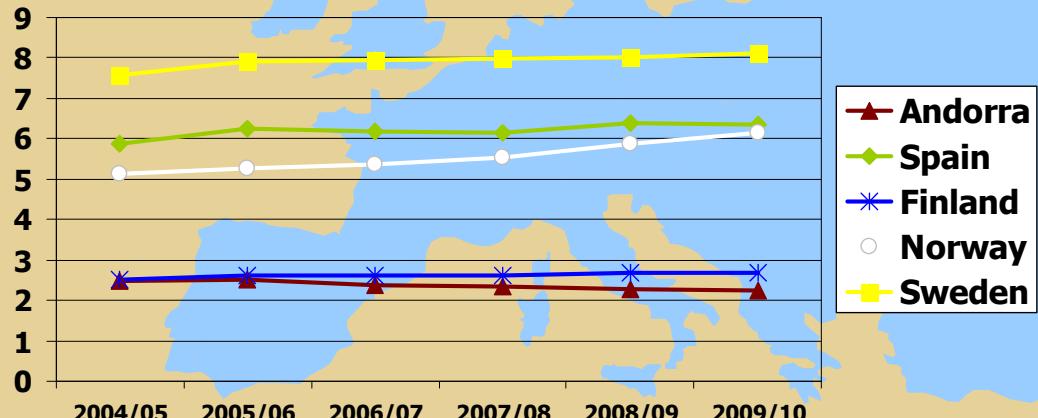


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Europe – Other western countries

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

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

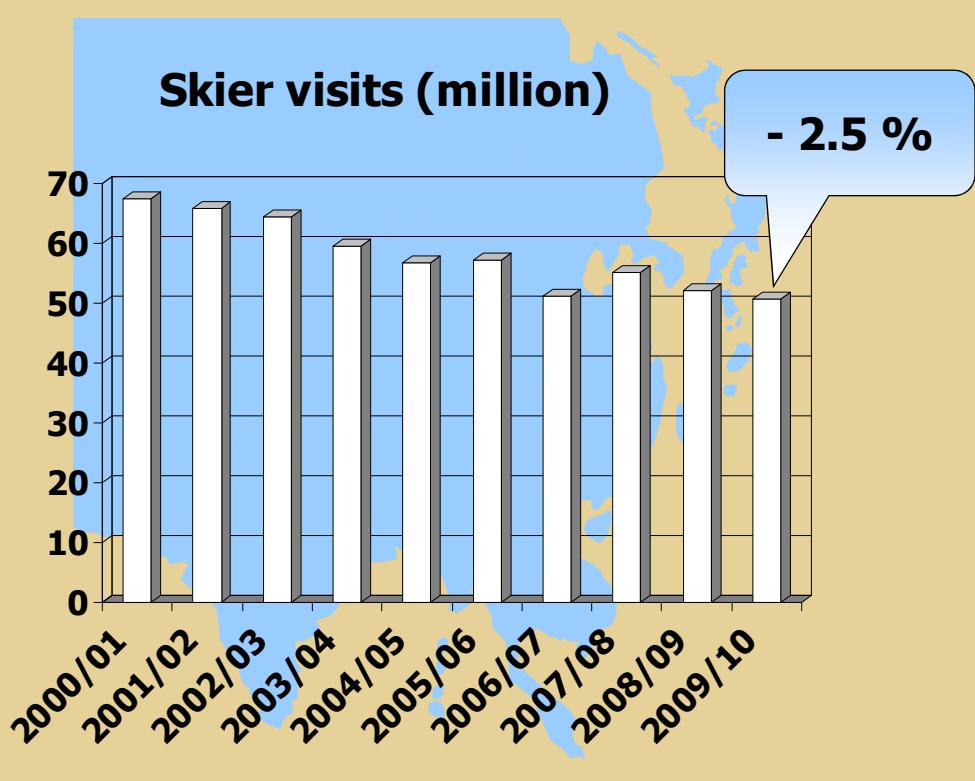


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Asia - Pacific



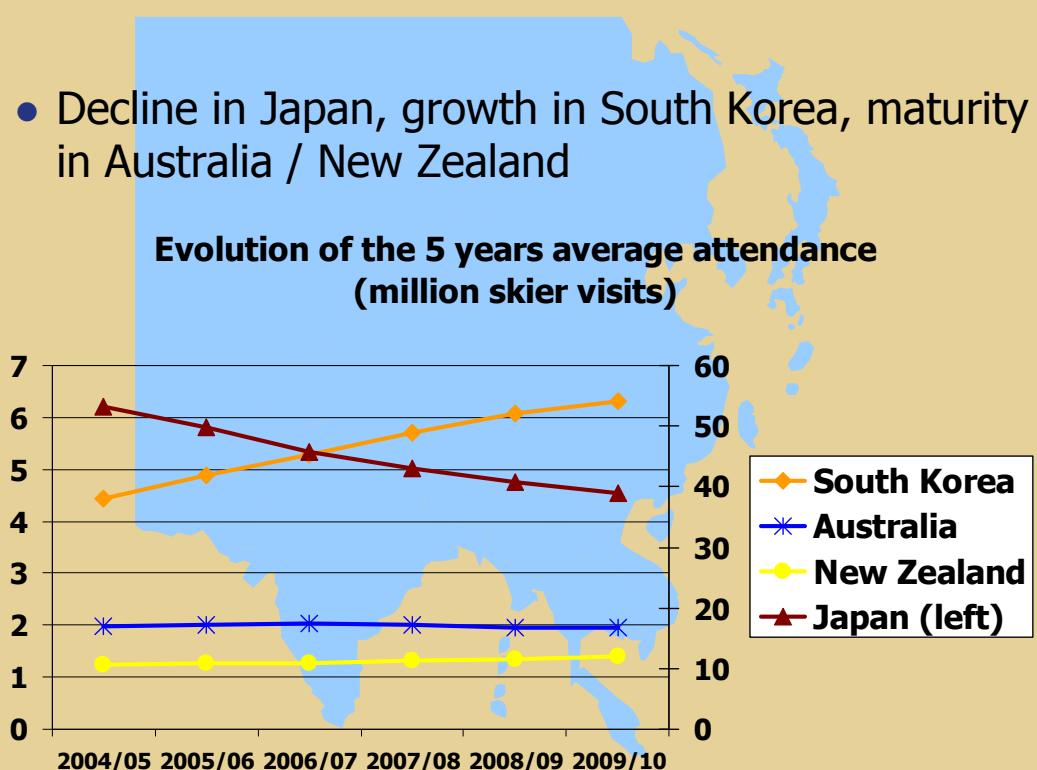
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Asia - Pacific

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



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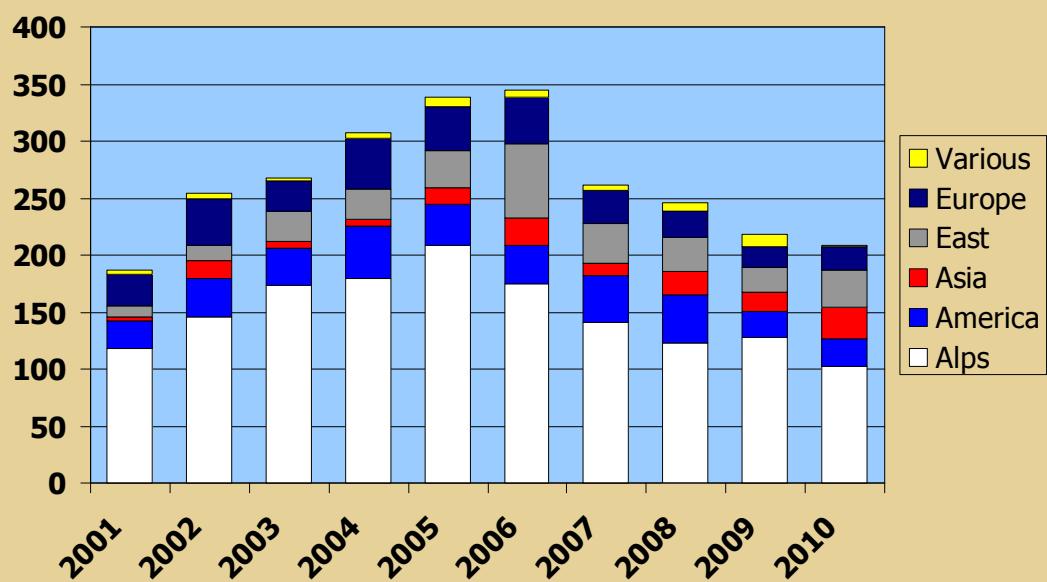


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New lifts

New lifts deliveries by regions

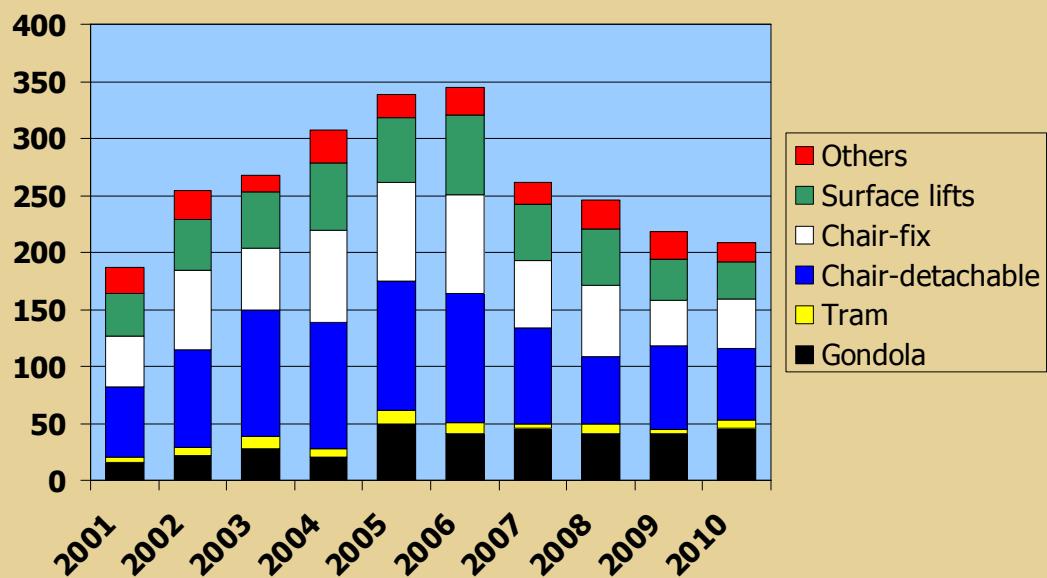




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New lifts

New lifts deliveries by lift type

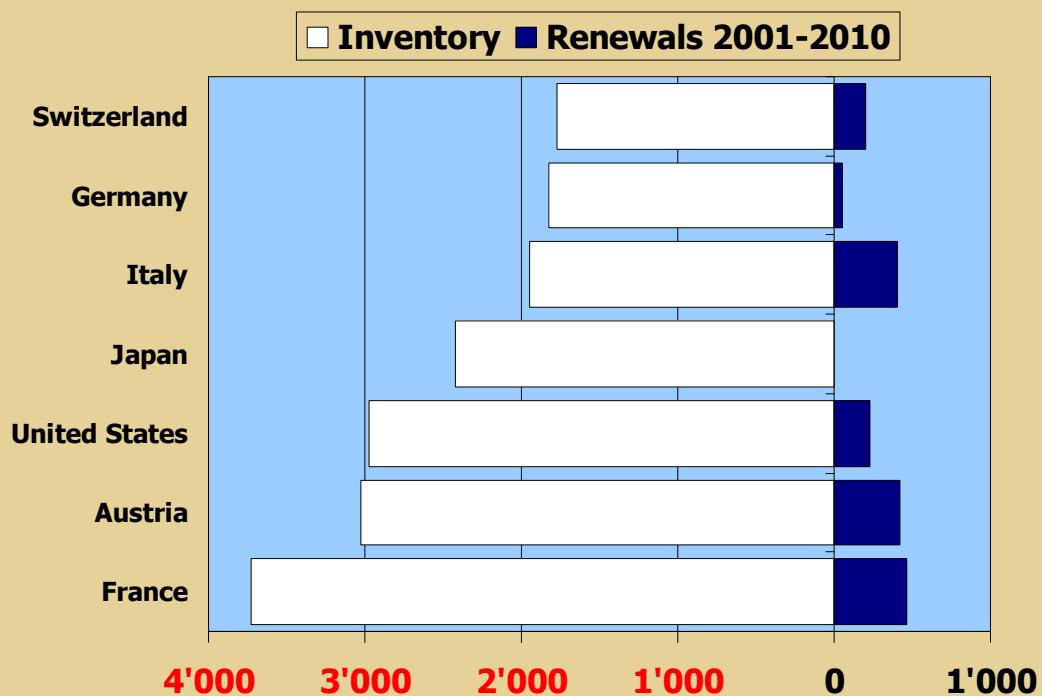


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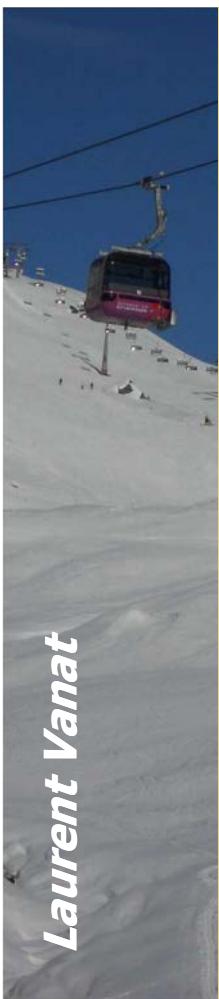


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Lifts - evolution

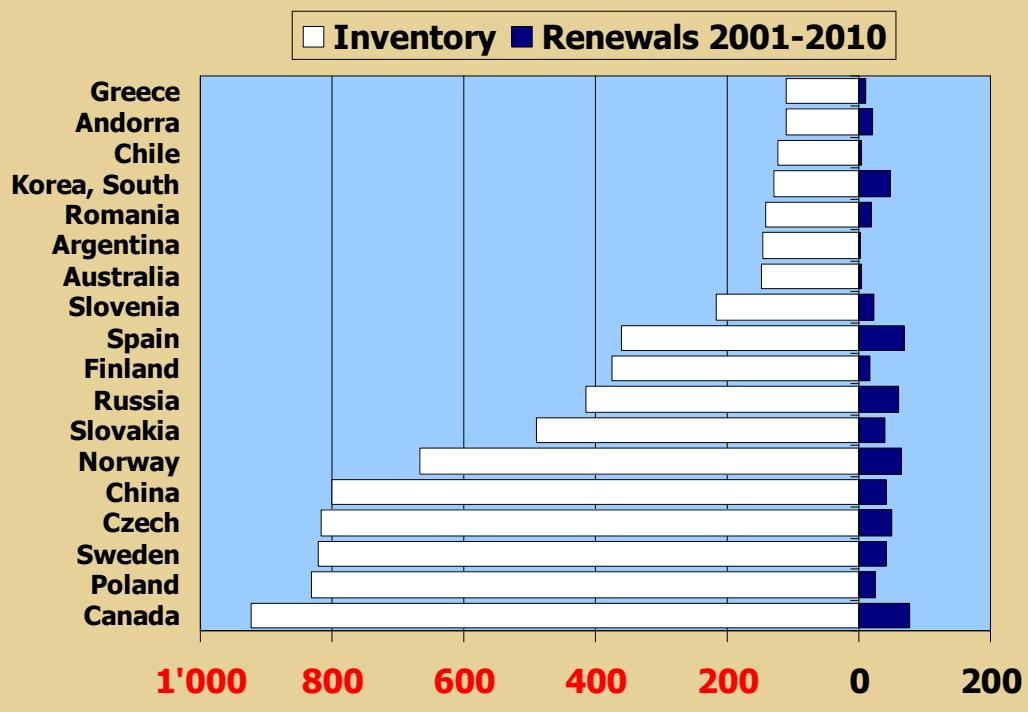


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Lifts - evolution

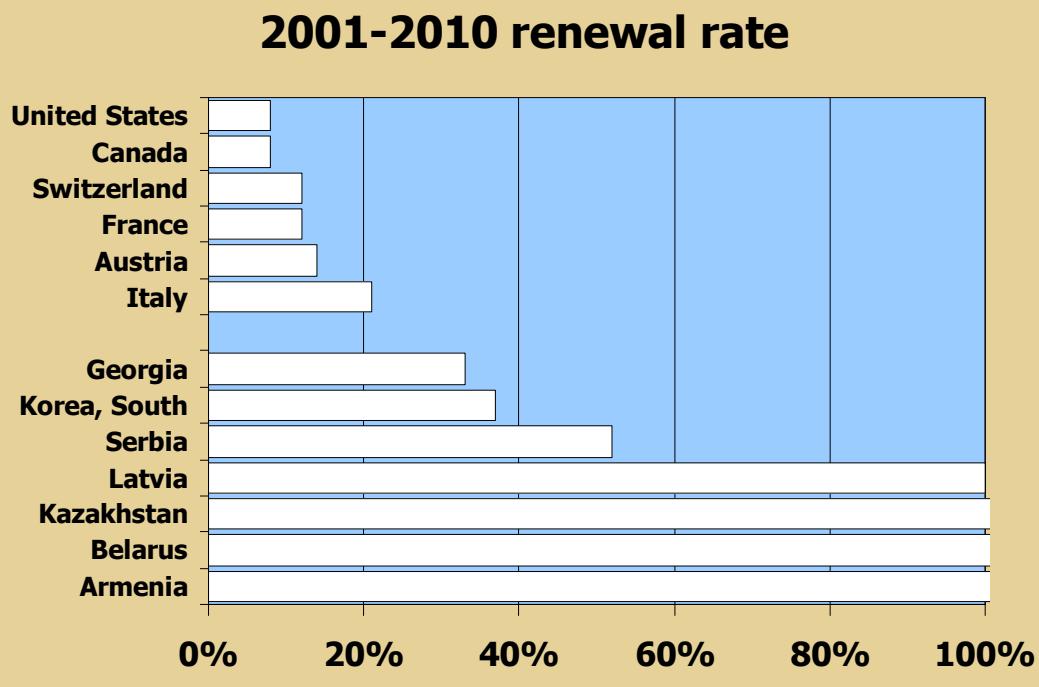


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Lifts - evolution



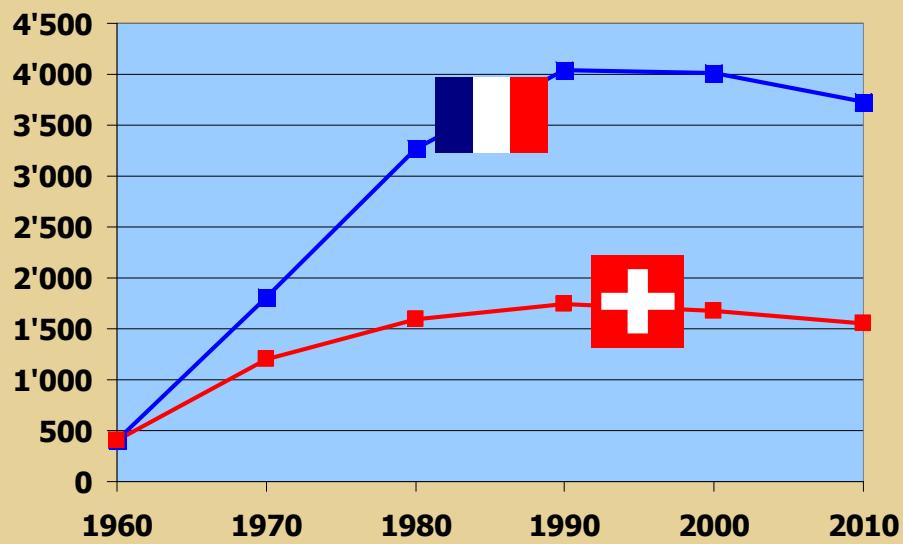
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Lifts : less but better

Evolution of the number of lifts in France and Switzerland



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Further reference

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