

# WELCOME

## Savills Ski Report 2023/24



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Savills Ski Report  
2023/24

# Savills Ski Report

Winter 2023-2024



**Jeremy Rollason,**  
Head of Savills  
Ski



**Kelcie Sellers,**  
Associate,  
Savills World  
Research



**Ceri Tinley,**  
Co-founder &  
MD Consensio  
Chalets



## Market overview

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Jeremy Rollason

## Ski Research Report

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Kelcie Sellers

## Market insight

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Ceri Tinley

## Q&A

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Jeremy, Kelcie &  
Ceri

The title "Market overview" is centered within a large yellow rectangular box. The text is in a bold, black, sans-serif font.The name "Jeremy Rollason" is centered below the title box, within the same yellow rectangular area. The text is in a black, sans-serif font.



# Val D'Isère

# 36.6%

Above pre-pandemic levels

# Tignes

42.9%

Above pre-pandemic levels



A panoramic view of a snowy mountain town, Morzine, under a bright sun with lens flare. The scene shows snow-covered rooftops, wooden balconies, and distant mountains.

# Morzine

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# 32.9%

Above pre-pandemic levels



# Méribel

# 15.9%

Above pre-pandemic levels





# Villars

# 24.7%

Above pre-pandemic levels

# Verbier

# 32.8%

Above pre-pandemic levels

# Les Collons

9.9%

Above pre-pandemic levels



# SaaS Fee

# 34.6%

Above pre-pandemic levels



# Andermatt

# 15.2%

Above pre-pandemic levels





# Champoluc

Less than  
**€10,000/m<sup>2</sup>**



**Lech**

**37.5%**

Above pre-pandemic levels



A large yellow rectangular box centered on the page, containing the title and author information. The background of the slide is a faded, artistic rendering of a mountain range with a skier in the foreground.

# Savills Ski Report

Kelcie Sellers

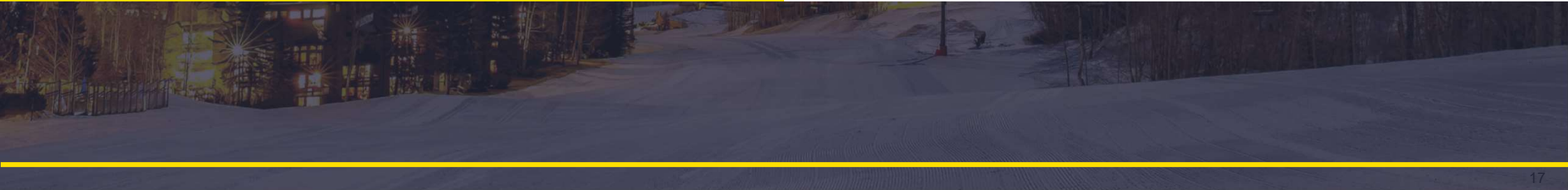


# 370

Million total skiers in winter 2022-2023

A tale of

# Two winters



A large, bright yellow rectangular box is centered on the slide. Inside this box, the text "Prime property performance" is written in a bold, black, sans-serif font. The background of the slide is a photograph of a snowy mountain town at dusk, with buildings illuminated by warm lights and snow-covered mountains in the background.

A photograph of a snow-capped mountain peak against a clear blue sky. The mountain is covered in white snow, with some rocky outcrops visible. The sky is a deep, clear blue. The overall scene is bright and clear.

**20%**

Above 2021 levels

**41%**

Above pre-pandemic  
levels

A nighttime aerial photograph of Aspen, Colorado, showing a town illuminated by warm lights, surrounded by dark, forested hills. A large firework is exploding in the sky on the left side of the frame. A semi-transparent dark blue rectangular box is overlaid in the center, containing the price and its description.

**€36,200**

Average asking price per square metre in Aspen

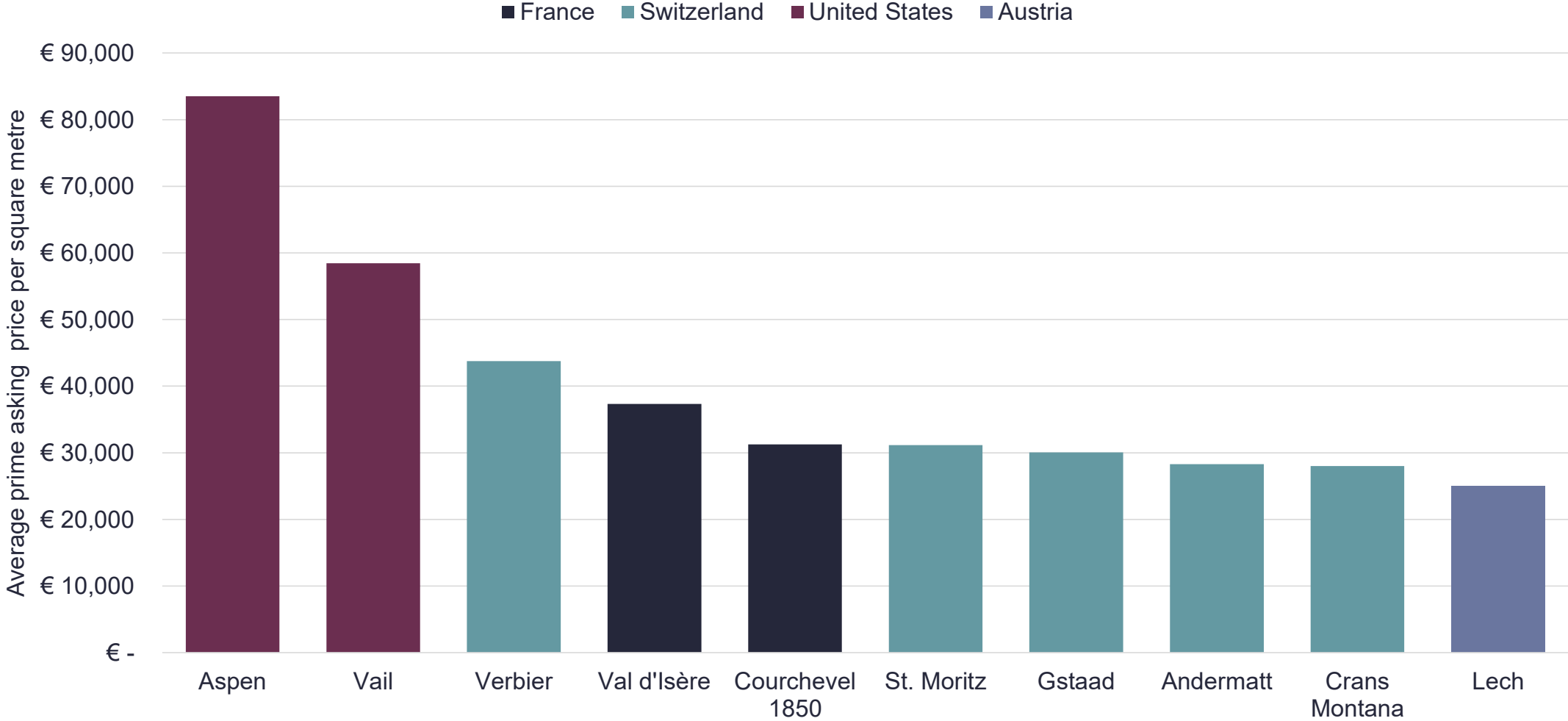
# Top 20 prime ski resorts (2023)



Source: Savills Research. Note: Based on properties with asking prices greater than €750,000 with exchange rate as of September 2023.



# Top 10 ultra-prime ski resorts (2023)



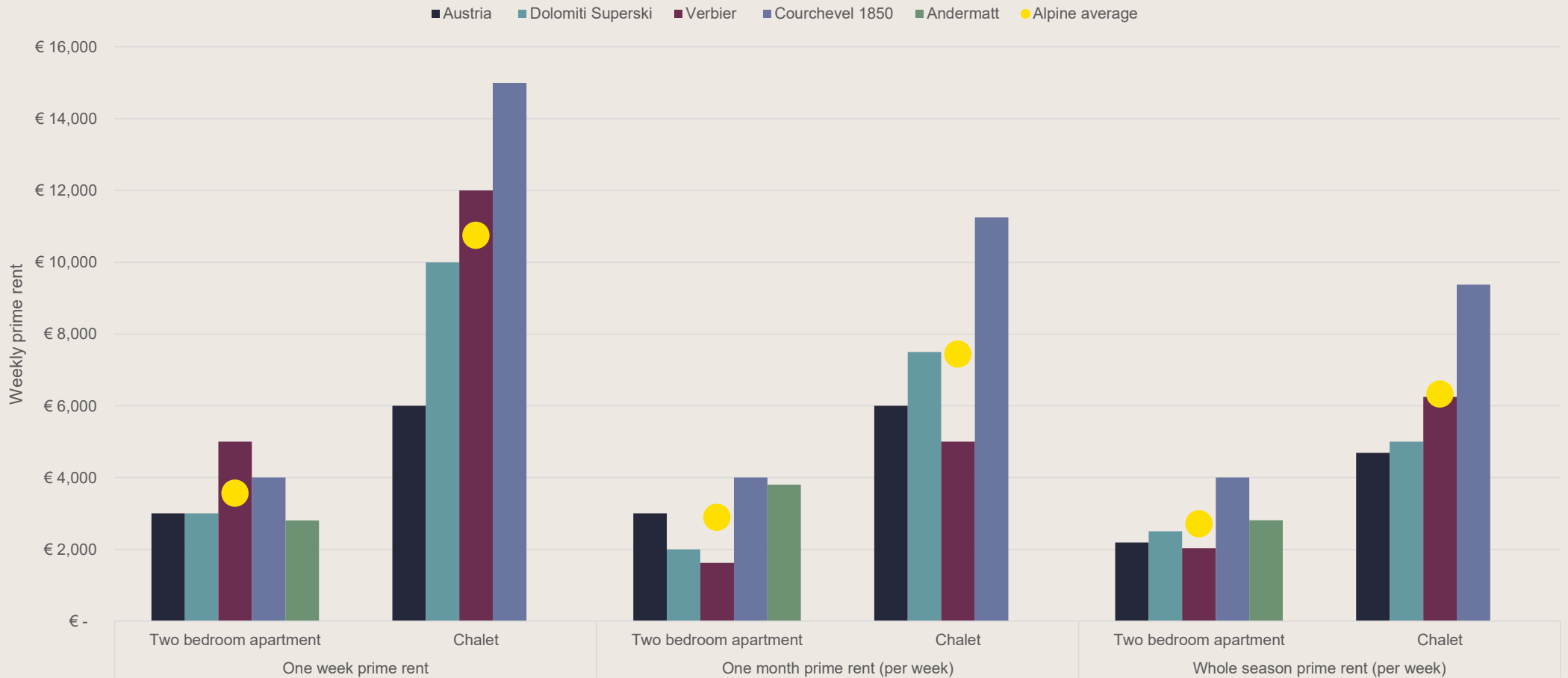
Source: Savills Research. Note: Based on properties with asking prices greater than €750,000 with exchange rate as of September 2023.

A large, solid yellow rectangular box is centered on the slide. Inside this box, the word "Rents" is written in a bold, black, sans-serif font, serving as the main title for the content.





# Average weekly rental costs for selected prime ski markets, by property type



A large yellow rectangular box is centered on the slide, containing the title "Savills Ski Resilience Index" in a bold, black, sans-serif font. The box is set against a background of a snowy mountain landscape at dusk or dawn, with a prominent mountain peak in the center and rolling hills in the foreground. The sky is a mix of dark blue and purple hues.

# **Savills Ski Resilience Index**

# The Savills Ski Resilience Index

savills

**Season  
length**

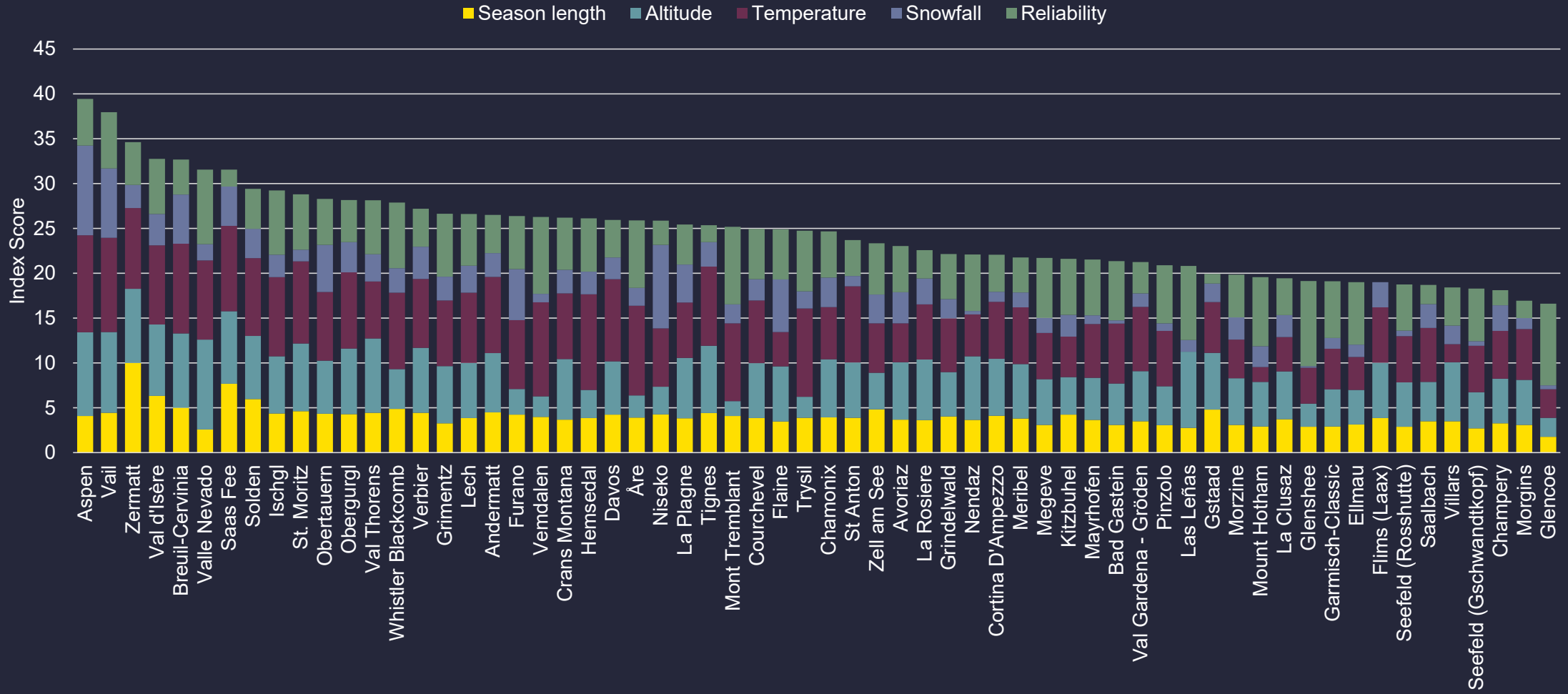
**Altitude**

**Temperature**

**Snowfall**

**Reliability**

# The Savills Ski Resilience Index 2023



KOENIG  
of St. Moritz

savills

Arztpraxis  
Dr. med. Peter Huber - Kiefer  
←

## Retail trends

KOENIG.  
of St. Moritz

Seeing is believing!  
You are invited to visit  
us in our workshop.

By appointment only.

100% made in Switzerland

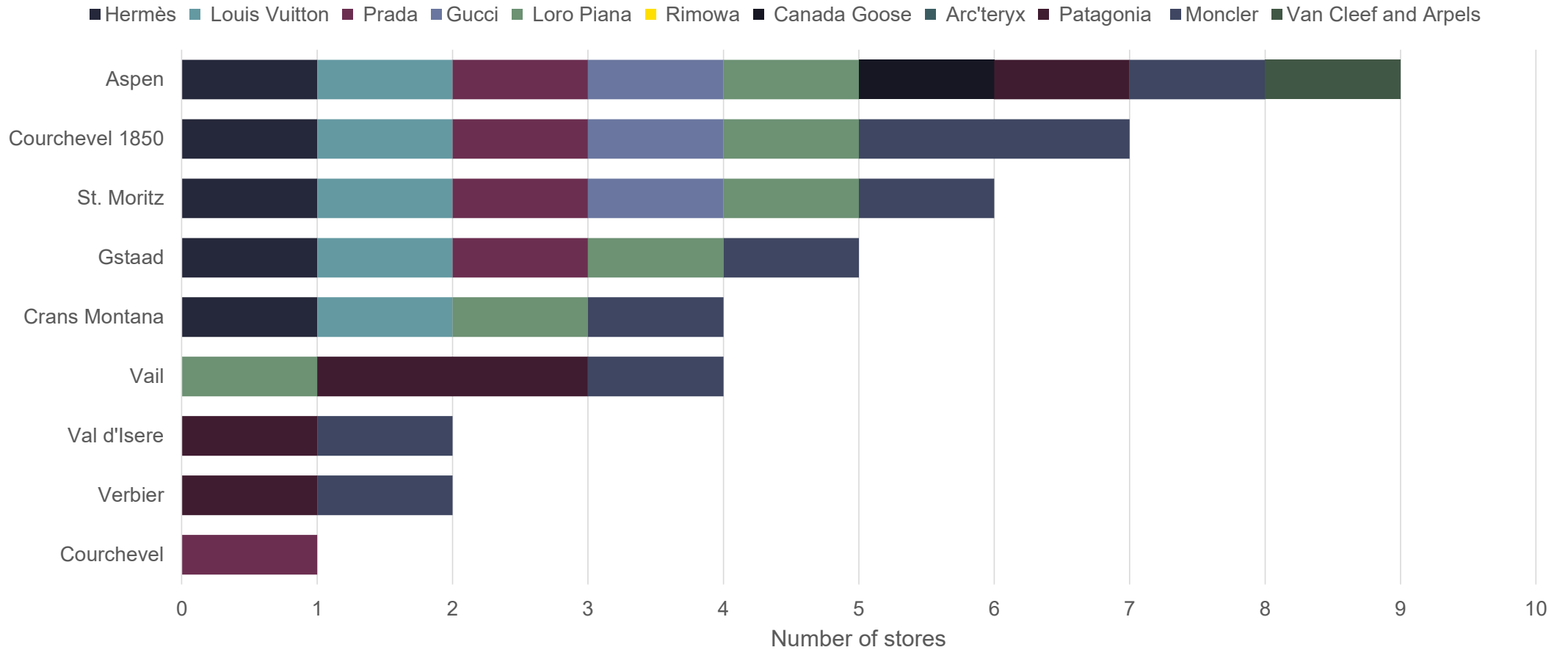
A background image of a woman wearing a light-colored, textured hat, looking to the right. The image is dimmed and serves as a backdrop for the text boxes.

Brands  
following  
buyers

Seasons  
and stores

Seeking  
connection

# Number of stores for selected luxury brands in ultra-prime ski markets





A large, solid yellow rectangular box is centered on the slide. Inside this box, the word "Outlook" is written in a bold, black, sans-serif font. The box is superimposed over a background image of a snowy mountain landscape.

# Outlook

# Growth factors

Climate  
uncertainty

Sustainability

Prime persists

Renters &  
Buyers

Regional  
resonance

A large, faint, circular graphic is centered behind the text in the yellow box. It appears to be a stylized 'C' or a similar symbol, rendered in a light yellow color that blends with the background.

## Market insight: Ceri Tinley

Co-founder & MD  
Consensio Chalets

# Consensio

EXCEPTIONAL PROPERTIES • EXCEPTIONAL SERVICE



A large, solid yellow rectangular box is centered on the page. Inside this box, the text "Q&A" is written in a bold, black, sans-serif font.

**Q&A**

# THANK YOU

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