



Ski Resort Report 2013



Post Office Travel Money

A report on ski resort costs in Europe and North America



Post Office Travel Money Ski Resort Report 2013

Prices for skiers are down this year in Zermatt and Morzine. However, the weaker pound means that skiers will have to dig a bit deeper in their pockets this winter and factor in higher costs in most of the European ski resorts that feature in the seventh annual Post Office Travel Money Ski Resort Report, compiled using prices researched by the leading tour operator Crystal Ski Holidays.

This year's report covers costs in 30 resorts – 22 in Europe and eight in North America – so that skiers have a representative view of the budgetary choices available to them. As well as listing the total price (see figure 1 based on ski equipment, lift passes, ski school and living costs) so that overall costs can be compared, the report also spotlights resorts recommended as best value together with those most suitable for beginners, families and world-class skiing.

Overall, the Eastern European resorts of Bansko (Bulgaria) and Kranjska Gora (Slovenia) again emerge as cheapest but there are low prices to be found in traditional favourites like Italy and Austria, which now account for seven of the resorts in the 2013 best value top 12.

However, the picture is a patchy one for skiers planning trips to the slopes and the price movements since last season – even within countries – vary dramatically. The biggest fall has been in Zermatt (Switzerland) where prices have plunged by almost 13 per cent since last winter. However, this is counterbalanced by a rise of over 11 per cent in another Swiss resort, Wengen.

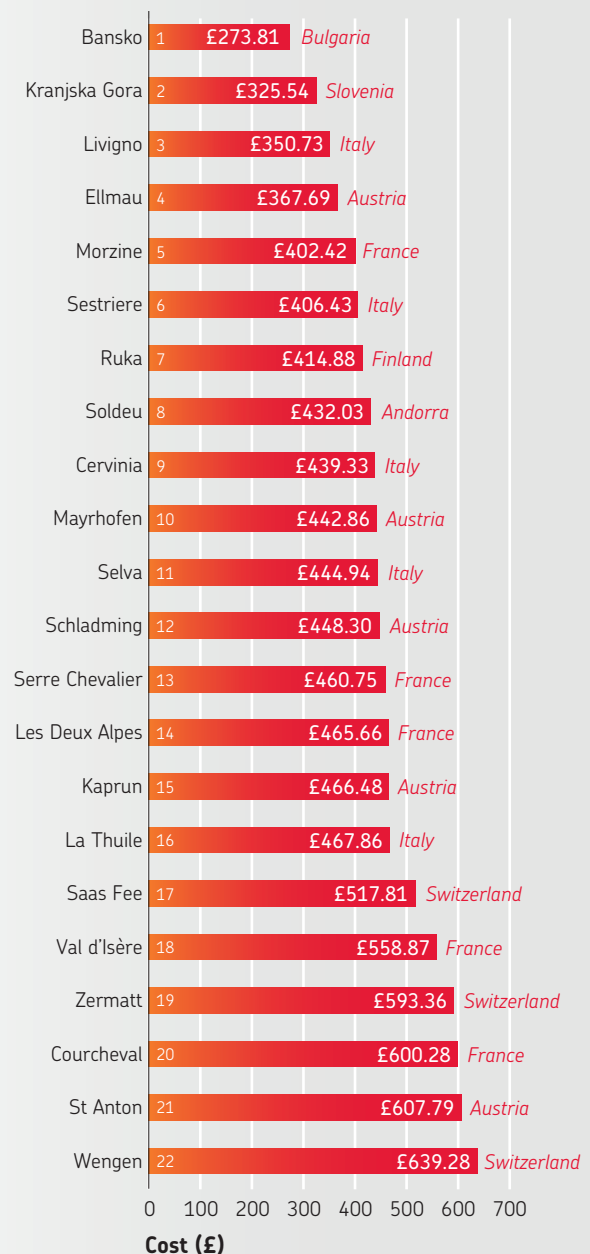
And while prices are down more than three per cent in the French resort of Morzine, they have risen by over nine per cent in Les Deux Alpes and 13 per cent in Courcheval. Similarly although prices are pegged in Kaprun, another Austrian resort, Ellmau, has registered an increase of over nine per cent.

The number of resorts surveyed in the USA and Canada has this year been increased to eight (see page 5) and the good news for those considering a transatlantic ski holiday is that prices are down by around 20 per cent in Tremblant (Canada) and Winter Park (USA).

Andrew Brown of Post Office Travel Money said:
“With sterling still weak against ski currencies, plan carefully to maximise spending money. Change holiday cash in advance before leaving home to avoid getting a poor rate at the airport or in the resort. Another good option is to load money onto a prepaid card like the Post Office Travel Money Card.”

Figure 1 Post Office Travel Money European Ski Resort Report Barometer 2013

Pricing survey covering a six-day ski pass and ski/boot hire for one person, together with ski school (five-six half days) and the cost of one lunch on the slopes plus drinks including coffee, Coca-Cola, wine and beer.



Data relates to exchange rates on 21 November 2013



Figure 2 Ski destination market shares

| Country | 2012/2013 | 2011/2012 |
|-------------|-----------|-----------|
| France | 34.8% | 34.6% |
| Austria | 28.2% | 27.9% |
| Italy | 15.2% | 15.4% |
| Andorra | 6.6% | 6.5% |
| Switzerland | 5.5% | 4.9% |
| USA/Canada | 4.0% | 4.5% |
| Bulgaria | 2.4% | 2.7% |
| Others | 3.3% | 3.5% |

Market shares quoted are provided by the *Crystal Ski Industry Report 2013* (crystalski.co.uk) and relate to holidays booked through tour operators in the 2012/2013 ski season.

CRYSTAL
SKI HOLIDAYS

Although the 2013 Crystal Ski Industry Report cites 'added value' deals and well-priced self-catering and all inclusive packages as reasons why the ski holiday market may be on the rise, factors other than cost play an important part in ski holiday choice – plentiful snow and a rise or fall in flight capacity among them. France, Austria and Switzerland all put on growth last year (figure 2) at the expense of Italy, which lost ground, despite good value in its resorts, because of a reduction in charter flying, and Bulgaria, where one of the main UK tour operators withdrew from the destination.

Best Value Resorts

- Prices are lowest in Bansko and only marginally up (3.8 per cent) on 2012 levels. The Bulgarian World Heritage Site offers the cheapest ski pass and equipment hire – 23 per cent less than runner up Kranjska Gora – and costs are under half those in the five most expensive resorts (Val d'Isère, Zermatt, Courchevel, St Anton and Wengen)
- Kranjska Gora (Slovenia) remains best value in the eurozone but Livigno is closing the gap. The Italian resort has moved up to third place, ahead of Ellmau, because price increases are lower in Livigno (three per cent) than in Ellmau (9.6 per cent)
- Morzine and Sestriere have overtaken Ruka and Soldeu because prices have risen almost 10 per cent in the Finnish resort and over 14 per cent in Andorra.

Figure 3 Best value resorts

| | Bulgaria Bansko | Slovenia Kranjska Gora | Italy Livigno | Austria Ellmau | France Morzine | Italy Sestriere | Finland Ruka | Andorra Soldeu | Italy Cervinia | Austria Mayrhofen | Italy Selva | Austria Schladming |
|----------------------------|--------------------|---------------------------|------------------|-------------------|-------------------|--------------------|-----------------|-------------------|-------------------|----------------------|----------------|-----------------------|
| Ski pass (6 days) | £109.00 | £138.53 | £158.44 | £187.01 | £148.92 | £155.84 | £148.05 | £206.93 | £181.82 | £191.34 | £183.55 | £187.88 |
| Ski/boot hire (6 days) | £68.00 | £90.91 | £74.46 | £55.41 | £90.91 | £80.52 | £92.64 | £73.59 | £82.25 | £88.31 | £90.04 | £84.85 |
| Ski school (5-6 half days) | £82.00 | £77.06 | £93.51 | £104.76 | £128.14 | £142.86 | £138.53 | £122.08 | £147.19 | £141.99 | £143.72 | £154.98 |
| Ski total | £259.00 | £306.50 | £326.41 | £347.18 | £367.97 | £379.22 | £379.22 | £402.60 | £411.26 | £421.64 | £417.31 | £427.71 |
| Coffee (large) | £1.13 | £1.56 | £1.30 | £2.16 | £2.25 | £2.16 | £2.25 | £1.90 | £3.03 | £2.60 | £2.16 | £2.16 |
| Coca Cola (small) | £1.56 | £1.99 | £2.16 | £2.16 | £2.42 | £2.60 | £3.46 | £2.51 | £2.16 | £2.16 | £2.16 | £2.16 |
| Wine (50cl) | £2.16 | £3.20 | £5.71 | £2.77 | £8.94 | £6.86 | £9.52 | £12.12 | £6.86 | £2.60 | £6.86 | £2.42 |
| Beer (25cl) | £1.30 | £1.90 | £2.16 | £2.16 | £2.66 | £2.60 | £3.98 | £2.51 | £3.03 | £2.60 | £3.46 | £2.16 |
| Lunch on the slopes | £8.66 | £10.39 | £12.99 | £11.26 | £18.18 | £12.99 | £16.45 | £10.39 | £12.99 | £11.26 | £12.99 | £11.69 |
| Food/drink total | £14.81 | £19.04 | £24.32 | £20.51 | £34.45 | £27.21 | £35.66 | £29.43 | £28.07 | £21.22 | £27.63 | £20.59 |
| TOTAL | £273.81 | £325.54 | £350.73 | £367.69 | £402.42 | £406.43 | £414.88 | £432.03 | £439.33 | £442.86 | £444.94 | £448.30 |

Best for families

Figure 4 Best for families

| | Bulgaria Bansko | Slovenia Kranjska Gora | Andorra Soldeu | Austria Ellmau | Finland Ruka | France Morzine | Austria Mayrhofen | Austria Schladming | Italy Cervinia | Italy La Thuile |
|--|--------------------|---------------------------|-------------------|-------------------|------------------|-------------------|----------------------|-----------------------|-------------------|--------------------|
| Ski pass (6 days) for a family | £344.00 | £453.68 | £413.85 | £561.04 | £479.65 | £522.94 | £555.84 | £561.04 | £581.82 | £567.97 |
| Ski/boot hire (6 days) for a family | £226.00 | £354.98 | £247.62 | £173.16 | £297.84 | £325.54 | £247.62 | £252.81 | £289.18 | £360.17 |
| Ski school (5-6 half days) for a family | £274.00 | £290.91 | £471.00 | £408.66 | £554.11 | £486.58 | £567.97 | £619.91 | £562.77 | £571.43 |
| Ski total | £844.00 | £1,099.57 | £1,132.47 | £1,142.86 | £1,331.60 | £1,335.06 | £1,371.43 | £1,433.76 | £1,433.77 | £1,499.57 |
| Coffee (large) | £1.13 | £1.56 | £1.90 | £2.16 | £2.25 | £2.25 | £2.60 | £2.16 | £3.03 | £0.87 |
| Coca Cola (small) | £1.56 | £1.99 | £2.51 | £2.16 | £3.46 | £2.42 | £2.16 | £2.16 | £2.16 | £1.73 |
| Wine (50cl) | £2.16 | £3.20 | £12.12 | £2.77 | £9.52 | £8.94 | £2.60 | £2.42 | £6.86 | £10.29 |
| Beer (25cl) | £1.30 | £1.90 | £2.51 | £2.16 | £3.98 | £2.66 | £2.60 | £2.16 | £3.03 | £2.16 |
| Lunch on the slopes for 4 | £34.63 | £41.56 | £41.56 | £45.02 | £65.80 | £72.73 | £45.02 | £46.75 | £51.95 | £55.41 |
| Food/drink total | £40.78 | £50.21 | £60.60 | £54.27 | £85.01 | £89.00 | £54.98 | £55.65 | £67.03 | £70.46 |
| TOTAL | £884.78 | £1,149.78 | £1,193.07 | £1,197.13 | £1,416.61 | £1,424.06 | £1,426.41 | £1,489.41 | £1,500.80 | £1,570.03 |

Family prices are based on two adults and two children under 12 years

- Although Bansko is far and away the cheapest option, less than £50 separates the three next best resorts – Kranjska Gora, Soldeu and Ellmau – which provides families on a budget with plenty of choice
- Italy's world-class Cervinia ski resort has entered the top ten for family value at the expense of Les Deux Alpes, where prices have mushroomed by over 15 per cent
- The Post Office again recommends families to do their homework because they can cut costs by resort-swapping within countries. In France, exchanging Les Deux Alpes* for Morzine could save 15 per cent (£257), while in Austria swapping Kaprun* for Ellmau saves 25 per cent (£407).

Andrew Brown of Post Office Travel Money, said:

“Resort prices are looking a bit higher this year and this can have a big impact on families when individual prices are multiplied for three, four or more people. Families who have not yet booked will be well advised to compare resort prices for ski equipment hire and lift passes, as well as for meals and drinks as these can make a big difference to the overall cost of a ski holiday.”

“However, while Eastern Europe again looks to offer the best value for families watching the pounds, this should not be the only issue when planning a ski holiday. It's important to choose a resort that matches each family member's ability and needs.”

* Les Deux Alpes family total: £1,681, Kaprun family total: £1,604



Cervinia

Best for beginners

- Ruka has joined Bansko and Ellmau as the best bets for beginners – each boasting a good range of nursery slopes
- Novices will have to pay 14 per cent more this year in the duty free resort of Soldeu. However, the upside is that Andorra's leading ski resort is renowned for its excellent ski school, staffed by English-speaking instructors
- Similarly, Austria's ski schools are well-suited to first timers on the slopes and offer good value. Although Ellmau remains cheapest of the five Austrian resorts surveyed, the Crystal Ski Holidays researchers found that prices in Kaprun are pegged at last season's levels, making this a good choice for beginners watching their budget.



Figure 5 Best for beginners

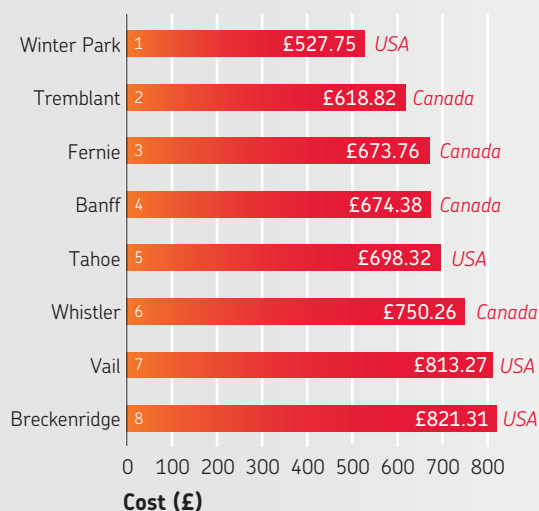
| | Bulgaria Bansko | Austria Ellmau | Finland Ruka | Andorra Soldeu | Italy Cervinia | France Serre Chevalier | France Les Deux Alpes | Austria Kaprun | Italy La Thuile | Switzerland Saas Fee |
|----------------------------|--------------------|-------------------|-----------------|-------------------|-------------------|---------------------------|--------------------------|-------------------|--------------------|-------------------------|
| Ski pass (6 days) | £109.00 | £187.01 | £148.05 | £206.93 | £181.82 | £196.54 | £194.81 | £194.81 | £177.49 | £198.59 |
| Ski/boot hire (6 days) | £68.00 | £55.41 | £92.64 | £73.59 | £82.25 | £100.43 | £87.45 | £85.71 | £118.61 | £126.76 |
| Ski school (5-6 half days) | £82.00 | £104.76 | £138.53 | £122.08 | £147.19 | £135.06 | £151.52 | £164.50 | £142.86 | £146.48 |
| Ski total | £259.00 | £347.18 | £379.22 | £402.60 | £411.26 | £432.03 | £433.78 | £445.02 | £438.96 | £471.83 |
| Coffee (large) | £1.13 | £2.16 | £2.25 | £1.90 | £3.03 | £1.86 | £2.81 | £2.42 | £0.87 | £3.27 |
| Coca Cola (small) | £1.56 | £2.16 | £3.46 | £2.51 | £2.16 | £2.49 | £2.38 | £2.16 | £1.73 | £3.47 |
| Wine (50cl) | £2.16 | £2.77 | £9.52 | £12.12 | £6.86 | £3.79 | £6.06 | £2.60 | £10.29 | £17.61 |
| Beer (25cl) | £1.30 | £2.16 | £3.98 | £2.51 | £3.03 | £2.55 | £2.60 | £2.16 | £2.16 | £3.32 |
| Lunch on the slopes | £8.66 | £11.26 | £16.45 | £10.39 | £12.99 | £18.03 | £18.03 | £12.12 | £13.85 | £18.31 |
| Food/drink total | £14.81 | £20.51 | £35.66 | £29.43 | £28.07 | £28.72 | £31.88 | £21.46 | £28.90 | £45.98 |
| TOTAL | £273.81 | £367.69 | £414.88 | £432.03 | £439.33 | £460.75 | £465.66 | £466.48 | £467.86 | £517.81 |

Transatlantic skiing

- With prices down by almost 20 per cent this season, Winter Park, Colorado emerges as best value for bargain hunters of the eight North American ski resorts surveyed
- The price fall in Tremblant, located in Quebec's Laurentian Mountains, is even more marked. Skiers will find prices down by almost 22 per cent, in part because the Canadian dollar has weakened against sterling
- Beginners will again find prices in resorts suitable for novices lower in the USA than in Canada. Both Tremblant (Canada) and Winter Park (USA) offer dedicated areas for beginners, but the US resort is almost 15 per cent cheaper
- Four of the North American resorts surveyed are recommended for families but almost £1,000 separates the lowest and highest-priced of these. The Post Office Ski Resort Report barometer adds up to £3,054 in Vail but only £2,060 in Tremblant, cheapest for a family of four.

Figure 6 Post Office Travel Money Transatlantic Ski Resort Report Barometer 2013

Pricing survey covering a six-day ski pass and ski/boot hire for one person, together with ski school (three or four days depending on resort) and the cost of lunch on the slopes plus drinks including coffee, Coca Cola, wine and beer.



Data relates to exchange rates on 21 November 2013

Figure 7 Transatlantic skiing

| | USA Winter Park | Canada Tremblant | Canada Fernie | Canada Banff | USA Tahoe | Canada Whistler | USA Vail | USA Breckenridge |
|----------------------------|--------------------|---------------------|------------------|-----------------|----------------|--------------------|----------------|---------------------|
| Ski pass (6 days) | £231.81 | £268.14 | £335.17 | £345.73 | £353.51 | £355.04 | £456.54 | £353.51 |
| Ski/boot hire (6 days) | £85.00 | £99.31 | £121.04 | £93.72 | £87.57 | £108.00 | £135.22 | £125.56 |
| Ski school (5-6 half days) | £191.24 | £224.07 | £191.17 | £207.93 | £238.89 | £261.93 | £198.97 | £323.89 |
| Ski total | £508.05 | £591.52 | £647.38 | £647.38 | £679.97 | £724.97 | £790.73 | £802.96 |
| Coffee (large) | £1.93 | £1.55 | £1.24 | £1.86 | £1.29 | £1.86 | £2.58 | £1.29 |
| Coca Cola (small) | £2.16 | £1.55 | £0.93 | £0.93 | £1.29 | £1.71 | £1.93 | £1.29 |
| Wine (50cl) | £4.02 | £4.34 | £6.21 | £6.21 | £3.22 | £3.72 | £3.86 | £3.22 |
| Beer (25cl) | £3.22 | £4.34 | £4.34 | £2.48 | £2.25 | £3.72 | £2.58 | £2.25 |
| Lunch on the slopes | £8.37 | £15.52 | £13.66 | £15.52 | £10.30 | £14.28 | £11.59 | £10.30 |
| Food/drink total | £19.70 | £27.30 | £26.38 | £27.00 | £18.35 | £25.29 | £22.54 | £18.35 |
| TOTAL | £527.75 | £618.82 | £673.76 | £674.38 | £698.32 | £750.26 | £813.27 | £821.31 |

World-class resorts

Figure 8 World-class resorts

| | Italy Sestriere | Italy Cervinia | Italy Selva | Austria Schladming | France Val d'Isère | Switzerland Zermatt | France Courchevel | Austria St Anton | Switzerland Wengen | USA Tahoe | Canada Whistler | USA Vail |
|----------------------------|--------------------|-------------------|----------------|-----------------------|-----------------------|------------------------|----------------------|---------------------|-----------------------|----------------|--------------------|----------------|
| Ski pass (6 days) | £155.84 | £181.82 | £183.55 | £187.88 | £218.18 | £261.27 | £202.60 | £194.81 | £204.93 | £353.51 | £355.04 | £456.54 |
| Ski/boot hire (6 days) | £80.52 | £82.25 | £90.04 | £84.85 | £146.32 | £121.13 | £120.35 | £166.23 | £185.21 | £87.57 | £108.00 | £135.22 |
| Ski school (5-6 half days) | £142.86 | £147.19 | £143.72 | £154.98 | £159.31 | £156.34 | £218.18 | £220.78 | £203.52 | £238.89 | £261.93 | £198.97 |
| Ski total | £379.22 | £411.26 | £417.31 | £427.71 | £523.81 | £538.74 | £541.13 | £581.82 | £593.66 | £679.97 | £724.97 | £790.73 |
| Coffee (large) | £2.16 | £3.03 | £2.16 | £2.16 | £3.46 | £4.20 | £4.61 | £2.60 | £2.96 | £1.29 | £1.86 | £2.58 |
| Coca Cola (small) | £2.60 | £2.16 | £2.16 | £2.16 | £2.60 | £3.64 | £4.33 | £2.60 | £3.45 | £1.29 | £1.71 | £1.93 |
| Wine (50cl) | £6.86 | £6.86 | £6.86 | £2.42 | £6.06 | £15.85 | £15.58 | £3.03 | £13.38 | £3.22 | £3.72 | £3.86 |
| Beer (25cl) | £2.60 | £3.03 | £3.46 | £2.16 | £3.46 | £3.99 | £4.33 | £2.16 | £3.29 | £2.25 | £3.72 | £2.58 |
| Lunch on the slopes | £12.99 | £12.99 | £12.99 | £11.69 | £19.48 | £26.94 | £30.30 | £15.58 | £22.54 | £10.30 | £14.28 | £11.59 |
| Food/drink total | £27.21 | £28.07 | £27.63 | £20.59 | £35.06 | £54.62 | £59.15 | £25.97 | £45.62 | £18.35 | £25.29 | £22.54 |
| TOTAL | £406.43 | £439.33 | £444.94 | £448.30 | £558.87 | £593.36 | £600.28 | £607.79 | £639.28 | £698.32 | £750.26 | £813.27 |

- The Italian resorts of Sestriere and Cervinia rate as cheapest of 12 surveyed for the second consecutive year – 36 per cent and 31 per cent lower-priced than Swiss Wengen, the most expensive in Europe
- Another Italian ski favourite, Selva, has moved up to third place because prices have risen just one per cent since last season, while Schladming in Austria's Tirol has dropped to fourth on the back of an almost seven per cent increase in ski and resort costs
- Sterling has strengthened against the Canadian dollar and as a result the popular Rockies resort of Whistler has overtaken Vail, Colorado where prices are up by over 17 per cent year-on-year.





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