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ALPINE SUMMER REPORT 2025

Key Trends in Alpine Summer Tourism

Introduction

The iconic European Alps, long known for winter, are undergoing a remarkable transformation as these, majestic mountain ranges have emerged as premier, summer destination. Discerning travellers are now flocking to the Alps in the summer seeking unspoilt nature, wellness retreats, cultural, experiences, and outdoor adventure.

Europeans rediscovered the appeal of the Alps during the Covid pandemic, when the region's clean air, open space, and easy access by car made it the ideal alternative to the usual mediterranean hot spots.

Furthermore, with Mediterranean wildfires and temperatures routinely surpassing 40°C during peak summer months, families are increasingly gravitating toward the Alps for their summer holidays.

Travellers growing preference for activity-based vacations has positioned the Alps perfectly within this trend, with hiking networks, mountain biking infrastructure, alpine lakes, and a growing number of music and cultural festivals proving an attractive alternative to the overcrowded beaches of the Mediterranean.



Lakeside Fun: Water Activities in Crans-Montana

Five Key Trends in Alpine Summer Tourism

01 The Wellness Revolution

02 Integrated Guest Cards

03 Infrastructure Development

04 Mountain Biking Boom

05 Cultural & Sporting Events

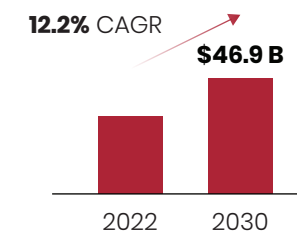
ALPINE WELLNESS

01. A New Era for Alpine Resorts

The Alps are currently undergoing a wellness revolution with luxury spa hotels, aquatic centers and natural swimming lakes springing up all over. Many alpine resorts are now positioning themselves as premier destinations within the booming global wellness industry.



The Swiss wellness tourism market is projected to reach \$46.9 billion by 2030, growing at 12.2% CAGR. ¹



- France generated \$60.6 billion in wellness tourism revenue in 2022 and this is set to reach \$149.7 billion by 2030.
- Combloux is integrating an ecological swimming lake; La Rosiere is hosting outdoor yoga retreats and Courchevel is seeing new wellness-focused real estate developments. ³



- Resorts like Alpin Life Resort Lürzerhof near Obertauern and Hotel Krallerhof in Fieberbrunn are embracing nature-centric wellness models. ²
- An abundance of natural swimming lakes complements newly built complexes such as Tyrol's Aqua Dome that has attracted nearly seven million visitors since its opening in 2004.

Case Study: Crans-Montana

Crans-Montana is rapidly establishing itself as Switzerland's flagship summer wellness destination—offering not only world-class spa facilities but an entire ecosystem geared toward health, sustainability, and active living.

Crans-Montana promotes itself as having "the purest air in Europe," making it an attractive destination for health-conscious travelers and those seeking summer relief from rising Mediterranean temperatures. With over 300 days of sunshine annually, Crans-Montana offers ideal conditions for outdoor wellness activities, boosting year-round tourism appeal. Visitors can engage in water-based wellness activities including paddle boarding, open-water swimming, and lakeside meditation across a chain of pristine alpine lakes through the renowned Seven Lakes Wellness Circuit.





Mountain-View Pool Day at Combloux's Biotope Lake

01

Six Senses Crans-Montana

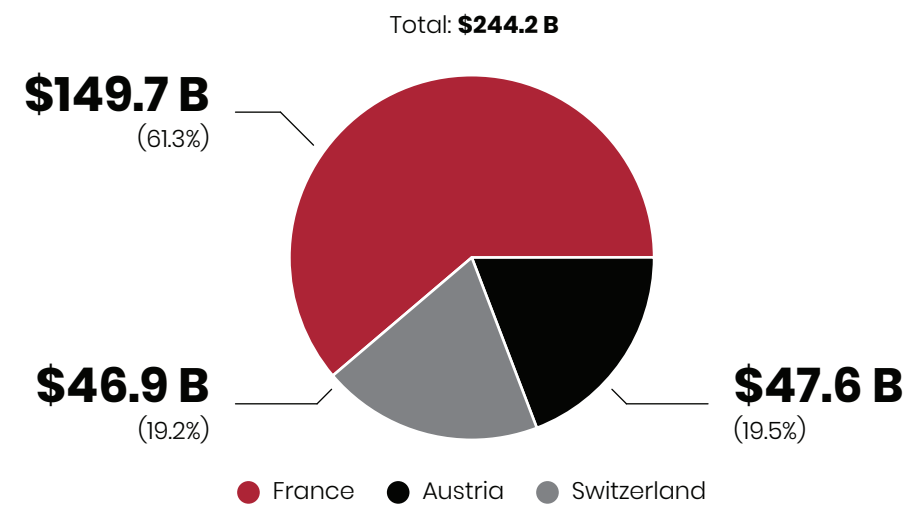
Newly opened, Six Senses Crans-Montana has set a new benchmark for luxury wellness offerings. The resort features over 2,000m² of spa and wellness space including three pools (indoor, outdoor, and vitality), a state-of-the-art aerial yoga studio, sauna pods, and therapy rooms. Rooted in sustainability, the resort offers farm-to-table dining, locally sourced spa treatments, and signature programs in sleep science, holistic fitness, and alpine herbal medicine.

02

Other Wellness Attractions in Crans-Montana

Crans-Montana offers guided Shinrin-Yoku (forest bathing) experiences through Forest Therapy Trails designed to reduce stress and enhance mental clarity. The region capitalizes on the health benefits of high-altitude environments through summer yoga and meditation festivals hosted at 1,500m above sea level. Further reinforcing its active wellness profile, Crans-Montana hosts triathlons, trail marathons, and endurance races that attract fitness-focused tourists throughout the summer season.

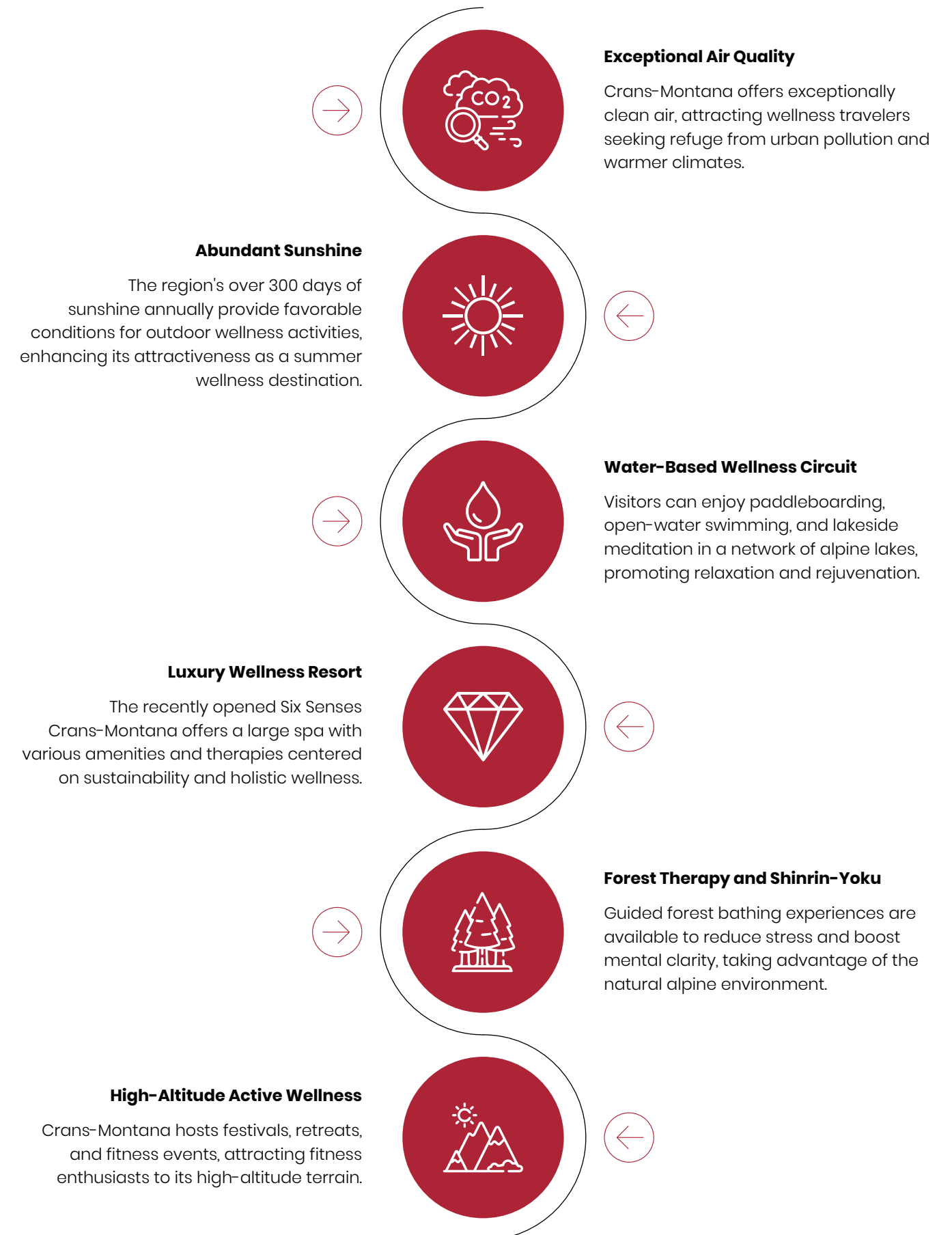
Projected Wellness Tourism Revenue by 2030



REFERENCES

- 1 "Swiss wellness tourism market projected to reach \$46.9 billion by 2030 (Source: Global Wellness Institute, 2024)."
- 2 "Austria's AQUA DOME in Tyrol has attracted nearly seven million visitors since its opening in 2004 (Source: AQUA DOME Official Statistics, 2024)."
- 3 "France ranks 3rd globally for wellness tourism, generating \$60.6 billion in 2022 (Source: Global Wellness Tourism Economy Report, 2023)."

6 reasons why Crans-Montana is one of the Alps' leading wellness resorts



02. The Secret Weapon Transforming Summer Tourism



Zell am See-Kaprun Summer Card: Gateway to Alpine Adventures

Guests cards have become an increasingly important tool for alpine resorts looking to boost their summer tourism. By lumping together a variety of local services, activities and lift access, resorts have managed to increase the average duration of a summer visit by appealing to cost-conscious visitors.



The Magic Pass, covering over 50 resorts, including Val d'Anniviers and Villars-Gryon-Diablerets, has become a financial and strategic anchor. Magic Pass customers now account for approximately 60% of summer visitors in certain resorts, securing cash flow and boosting occupancy. ¹



Resorts like Lech and Saalbach-Hinterglemm have centered their summer marketing around value-driven programs such as the Lech Card and Joker Card, bundling transport, attractions, and activities into a single offering.



The Portes du Soleil Multi Pass gives access to over 70 activities for just €3/day, dramatically increasing perceived value and supporting a 46% rise in summer lift pass sales since 2021. ²

Case Study: Zell am See-Kaprun – The Gold Standard in Guest Card Strategy

01

Comprehensive Access Benefits

The 'Summer Card' in Zell am See-Kaprun is available via registered accommodation providers and provides substantial savings for visitors.

The card has proved effective in encouraging longer summer stays by encouraging guests to explore more of the region. The program successfully integrates over 40 experiences into a seamless, easy-to-use package through its robust partnership ecosystem.

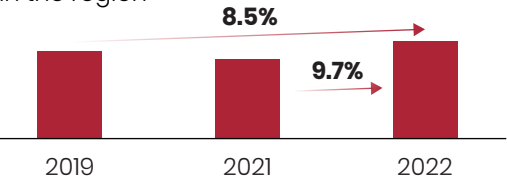
Key benefits include:

- Complimentary access to many of the regions gondolas and cable cars
- Boat trips on Lake Zell
- Entry to the lake-side swimming lidos
- Admission to other local attractions

02

Tourism Impact

Summer 2022 saw 784,763 overnight stays in the region



a 9.7% increase over 2021 and an 8.5% rise over 2019—marking the highest figures since 1992, according to Zell am See Tourism Statistics, 2023. ³

Visitor satisfaction scores among cardholders are significantly higher, correlating with stronger rebooking rates throughout the summer season.

03

Guest Cards – How resorts are bundling services

Feature/Benefit	Zell am See-Kaprun Summer Card	Portes du Soleil Multi Pass	Magic Pass
Cable Cars/Lifts	✓ Schmitenhöhe & Kitzsteinhorn (excl. 3K)	✓ 25 pedestrian lifts (12 resorts)	✓ ~100 mountain lifts (summer + winter)
Swimming Pools / Lakes	✓ Indoor pool & lidos	✓ Pools, lakes, ice rink	✗ (Only via paid add-on "Baths" option)
Museums & Cultural Sites	✓ Multiple museums, national park	✓ Multiple museums, abbeys	✗ Few or unspecified
Family Attractions	✓ Boat trip, gorges, hikes	✓ Mini-golf, tennis, family attractions	✓ Hiking/biking trails, scenic areas
Discounts	✓ Tauern SPA, railway, bonus partners	✓ 10-50% off 100+ activities	✓ Some add-ons (e.g., Metro Alpin)
Validity Period	15 May – 31 Oct	29 May – 2 Nov	1 May – 30 Apr (Annual)

REFERENCES

- ¹ "Magic Pass users account for ~60% of summer visitors in Villars-Gryon-Diablerets (Source: Magic Pass Annual Report, 2024)."
- ² "Portes du Soleil summer lift pass sales up 46% since 2021 (Source: Portes du Soleil Tourism Board, 2024)."
- ³ "Summer 2022 overnight stays in Zell am See-Kaprun increased by 9.7% YoY (Source: Zell am See Tourism Statistics, 2023)."



Riding the Heights: Cable Car Journey Over Chamonix

INFRASTRUCTURE INVESTMENT

03. Building the Alpine Resorts of Tomorrow

Faced with the threat of global warming many alpine resorts have been racing to join forces over recent years. The 'bigger is better' mentality has seen many smaller resorts join larger linked ski areas where the cost of new infrastructure projects such as new lifts and snow making facilities can be shared.

This has led to an investment boom across the Alps where forward-thinking resorts are upgrading lift systems, creating inter-valley connections, and expanding accessibility for non-winter sports.



Veysonnaz

CHF 25 million invested in gondola upgrades (2016-2019), improving summer access to high-altitude hiking and biking. ¹



La Tzoumaz

New Télémixte hybrid lift (gondola + chairlift), boosting cyclist and hiker accessibility. Completion expected by 2026. New 10km toboggan run.



Grimentz - Zinal

New Sorebois cable opened up Espace Weisshorn hiking routes



Fieberbrunn

New 10-person Streuböden Cable Car (2,500 passengers/hour) plus new bike lift services (F5 Obingleitn) operating July-September 2025. €600,000 raised by 200+ community investors for Fieberbrunn's summer upgrades. ²



KitzSki

The Bergbahn Kitzbühel, Kitzbühel Tourism, and the Kitzbüheler Alpen – Brixental Tourist Association have formed the ARGE Bike association, collectively investing approximately €1.2 million in the expansion of KitzBike trails, tours, and infrastructure. ³



Chamonix

€477 million, 40-year infrastructure plan is reshaping the valley, extending gondola operations into summer and redefining Chamonix as a truly year-round destination.



Combloux

Creation of new 1,900m2 bio swimming lake, naturally plant filtered without chemicals.

Case Study: Chamonix - A 'Four Seasons' Powerhouse

Few alpine resorts embody transformation like Chamonix. Traditionally a mountaineering and winter sports icon, Chamonix has evolved into a vibrant summer destination, powered by significant investment in lift and access infrastructure. The Compagnie du Mont Blanc (CMB) launched a €477 million investment strategy, building three new gondolas, two chairlifts, and multiple beginner zones to revolutionize visitor access. New dual season gondolas improve summer accessibility to key trailheads, alpine meadows, and panoramic viewpoints, creating seamless connections throughout the valley.

01

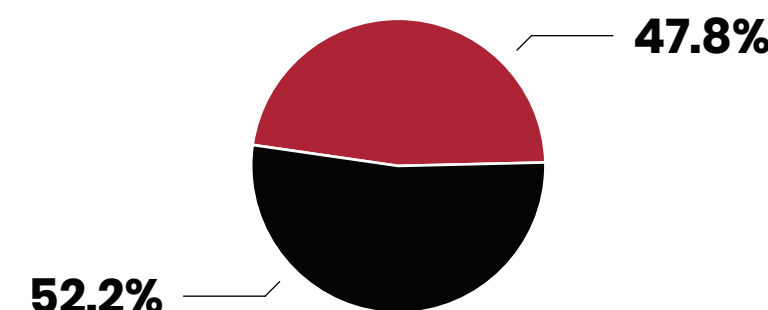
Summer Tourism Impact

- The wider Chamonix Valley recorded 22.8 million stays in summer 2019. ⁴ Post-pandemic recovery has been swift, with 2022 and 2023 marking the busiest summers on record for this resort.
- Rental income surged 84% in 2024 compared to 2023 and doubled compared to 2022, fueled by rising demand for summer lets, according to Chamonix Tourism Data, 2024. ⁵
- Indeed, in 2024 Chamonix recorded more overnight stays in the summer than winter.

Chamonix Overnight Stays 2024: Winter VS. Summer

Total Overnight Stays: **8,540,700**

- Winter: 4,086,000 Stays
- Summer: 4,454,700 Stays



REFERENCES

- ¹ "Veysonnaz invested CHF 60 million in infrastructure upgrades between 2016 and 2019 (Source: NV Remontées Mécaniques Annual Report, 2020)."
- ² "€600,000 raised by 200+ community investors for Fieberbrunn's summer upgrades." (Source: Fieberbrunn Tourism Office, 2024)
- ³ "The Bergbahn Kitzbühel, Kitzbühel Tourism, and the Kitzbüheler Alpen – Brixental Tourist Association have formed the ARGE Bike association, collectively investing approximately €1.2 million in the expansion of KitzBike trails, tours, and infrastructure." (Source: Snow Industry News, 2023)
- ⁴ "Summer tourism in Chamonix Valley reached 22.8 million stays in 2019 (Source: Mont Blanc Tourism Office, 2020)."
- ⁵ "Chamonix rental income increased 84% from 2023 to 2024 (Source: Chamonix Tourism Data, 2024)."

04. E-bikes power biking boom



Any visitor to the Alps in recent years can't fail to have noticed the boom in mountain biking and particularly the proliferation of e-mountain bikes.

E-bikes have revolutionised mountain biking in the Alps and have made the sport much more accessible. Resorts have quickly adapted with new trail networks, world-class events, charging infrastructure and adapted gondolas and chair lifts.



Resorts like Crans-Montana and Champéry are building biking into their core summer strategy, hosting global events like the 2025 Mountain Biking World Championships.



Regions like Leogang, Kirchberg, and Maria Alm are expanding trail networks, developing e-bike infrastructure, and hosting international competitions.



Châtel and the Portes du Soleil area are now among Europe's leading summer mountain biking destinations, with expansive, lift-connected trail networks.

Case Study: Leogang - Europe's Model for Mountain Bike Tourism Success

Epic Bikepark Leogang has set a new benchmark for mountain bike tourism in Europe. The resort has invested in extensive trail expansion and now offering over 80 km of trails. With continual investment and dynamic Online "Bike Bonus" pricing the traditional summer season has been successfully extended into last Spring and early Autumn.

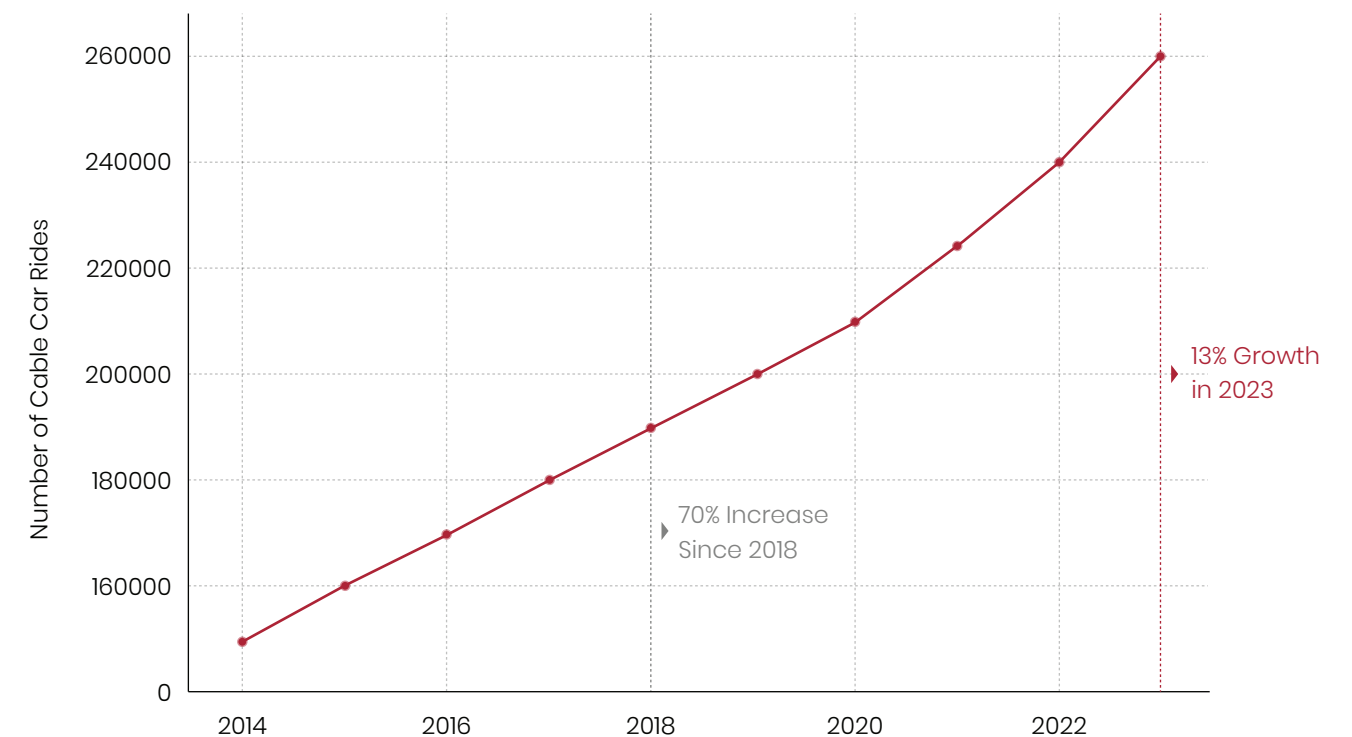
Leogang will host the WHOOP UCI Mountain Bike World Series in June 2025, reaffirming its place on the global biking calendar and cementing its reputation as a premier destination for competitive and recreational riders alike. ¹

Mountain Biking by the Numbers



MOUNTAIN BIKER DAYS GROWTH (2018-2025)

Growth in Cable Car Rides for Mountain Biking in Leogang (2014 - 2023)



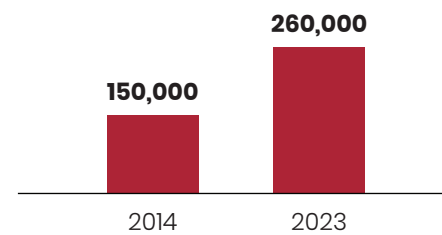
Visitor Growth

Mountain Biker Days have increased by

70%
Since 2018 ²

showing the dramatic rise in this visitor segment over a relatively short period.

Cable car rides surged from 150,000 in 2014 to over 260,000 in 2023 ³



reflecting increased uplift usage by mountain bikers and other summer visitors. Summer now represents nearly 50% of Leogang's one million annual overnight stays, highlighting the successful transition from winter-dominant to balanced year-round tourism.

Other Mountain Biking Hotspots



→ Crans-Montana

Major investment driven by hosting the 2025 World Championships. Region aims to shift revenue balance from 60% winter / 40% summer towards a more even split.

→ Champéry

Hosting the MTB World Championships (September 1-7, 2025); dedicated bike lifts and growing e-bike offerings.



→ Kirchberg

Part of the Gravity Mountain Bike Association's elite destinations; significant growth in trail offerings.

→ Maria Alm

Pioneering full e-bike charging network across mountain trails.



→ Châtel

20 downhill routes, slopestyle parks, and access to 850km of connected Portes du Soleil trails—solidifying its reputation as a top mountain biking destination.

→ Les Gets

Having firmly established itself as "the most famous MTB resort" with 128km of marked trails and hosts elite competitions including the UCI Mountain Bike World Cup.

REFERENCES

- ¹ "Mountain biking now accounts for 13% of total turnover in the region—more than all other summer activities combined—demonstrating the economic transformation this single activity has brought to the area." (Source: Rasoulution, 2023)
- ² "Mountain Biker Days in Leogang increased 70% since 2018 (Source: Leogang Tourism Office, 2024)."
- ³ "Epic Bikepark Leogang cable car rides rose from 150,000 (2014) to over 260,000 (2023) (Source: Saalfelden-Leogang Tourism, 2024)."



05. Cultural and Sporting Events



Warmer and drier summers and increased summer tourism have increased the appeal of the Alps for event organisers in recent years. As a result, there has been a marked increase in music festivals, art installations, and international sporting competitions as event organisers make full use of the Alps natural beauty to create spectacular backdrops to their events.

Event organisers are redefining mountain destinations as vibrant cultural and sporting hubs and also succeeding in attracting a new demographic to the Alps.



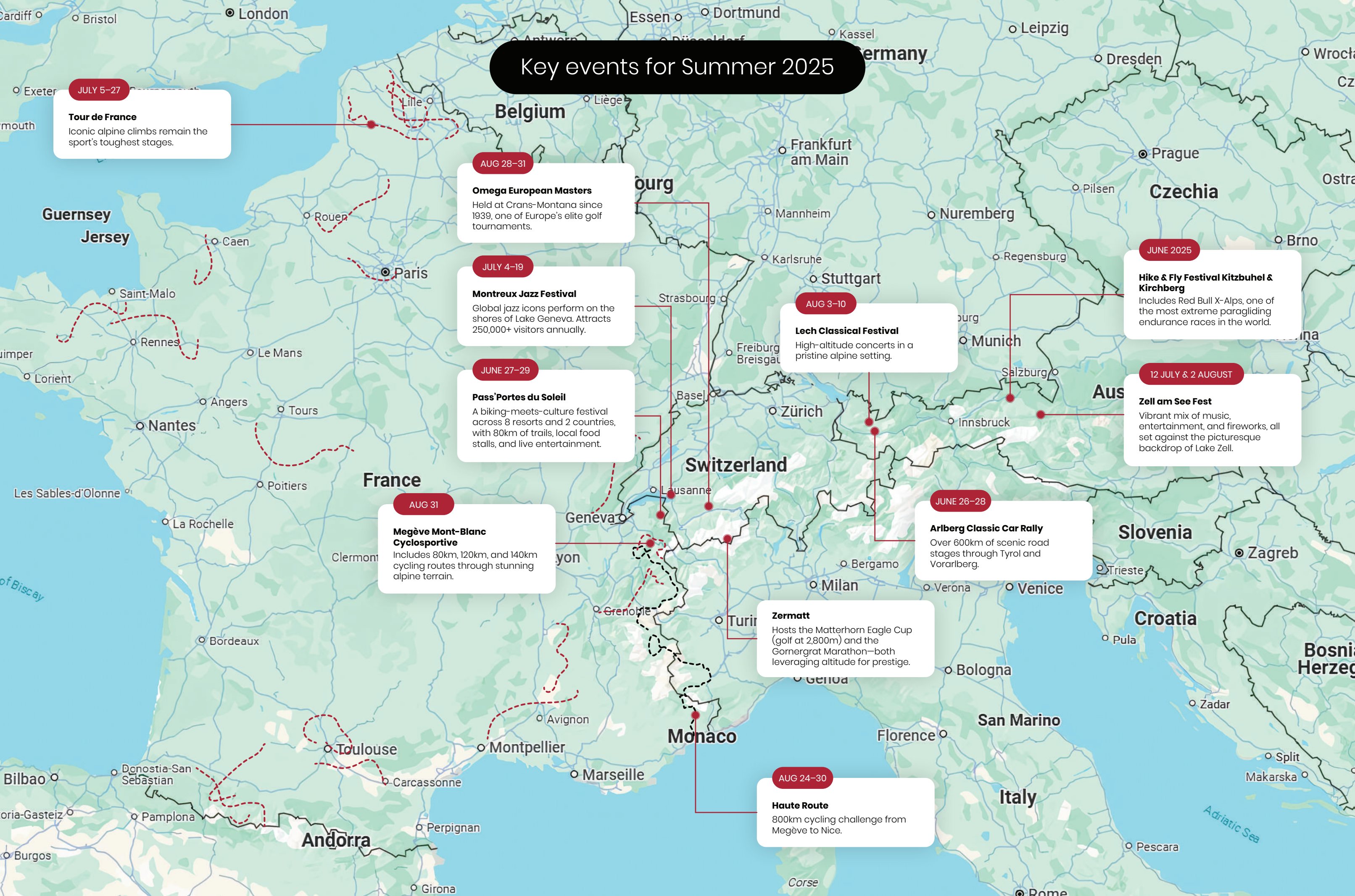
From jazz on Lake Geneva to marathons near the Matterhorn, Swiss resorts are making full use of their unique landscapes for both elite sport and cultural events.



Summer in Tyrol and Vorarlberg comes alive with classic car rallies, vibrant music festivals in Lech, and adrenaline-pumping events like the Red Bull X-Alps in Kitzbühel.



The Tour de France, ultra-endurance trail runs, and multi-resort cycling events like Pass'Portes du Soleil drive tourism from June through September.



Key events for Summer 2025

JULY 5–27
Tour de France
Iconic alpine climbs remain the sport's toughest stages.

AUG 28–31
Omega European Masters
Held at Crans-Montana since 1939, one of Europe's elite golf tournaments.

JULY 4–19
Montreux Jazz Festival
Global jazz icons perform on the shores of Lake Geneva. Attracts 250,000+ visitors annually.

JUNE 27–29
Pass'Portes du Soleil
A biking-meets-culture festival across 8 resorts and 2 countries, with 80km of trails, local food stalls, and live entertainment.

AUG 31
Megève Mont-Blanc Cyclo sportive
Includes 80km, 120km, and 140km cycling routes through stunning alpine terrain.

AUG 3–10
Lech Classical Festival
High-altitude concerts in a pristine alpine setting.

JUNE 2025
Hike & Fly Festival Kitzbuhel & Kirchberg
Includes Red Bull X-Alps, one of the most extreme paragliding endurance races in the world.

12 JULY & 2 AUGUST
Zell am See Fest
Vibrant mix of music, entertainment, and fireworks, all set against the picturesque backdrop of Lake Zell.

JUNE 26–28
Arlberg Classic Car Rally
Over 600km of scenic road stages through Tyrol and Vorarlberg.

Zermatt
Hosts the Matterhorn Eagle Cup (golf at 2,800m) and the Gornergrat Marathon—both leveraging altitude for prestige.

AUG 24–30
Haute Route
800km cycling challenge from Megève to Nice.

What Next for the Alpine Property Market?

New second home legislation has had a significant impact on the market and should help to support prices into the future



The Lex Webber laws in Switzerland have effectively put a stop to the construction of any new second homes in the majority of the popular ski regions.



Laws in Austria are similarly strict with no new second homes (known locally as 'zweitwohnsitz') being created since 2009. For existing properties that have already been designated for touristic use, owners will be under a very strict rental obligation to ensure against 'cold beds'.



The French Alps have historically been the least restrictive of the alpine markets. This is, however, beginning to change as individual resorts (Chatel, Chamonix) are now taking steps to restrict the supply of new second homes.



A ROBUST PROPERTY MARKET

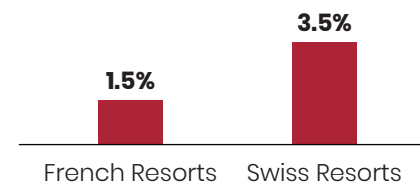
The boom in alpine summer tourism, fueled by wellness retreats, mountain biking, cultural events, and new infrastructure investment, has created a robust and diversified property market.

According to Knight Frank's 2025 Alpine Property Report, property values across the Alps rose by an average of 3% in 2024, with Swiss resorts (3.5% growth) outperforming French counterparts (1.5%).

This follows a 13-year trend of 1.9% annual growth, accelerating to 4% post-pandemic, reflecting strong and steady long-term demand despite the various economic headwinds and climate change.

Knight Frank's 2025 Alpine Property Report

Average 3% in 2024



SECOND HOMES: A DUAL-SEASON INVESTMENT OPPORTUNITY

The demand for second homes remains strong, driven by the Alps' expanded summer appeal and pivot to year-round tourism. Properties in "dual-season" resorts now achieve occupancy rates of up to 60% in summer, a significant improvement from winter-only reliance. (Source: Investropa, 2025)

This shift enhances rental yields, with dual-season properties offering more consistent year-round income streams—crucial for investors facing shorter ski seasons in lower-altitude resorts due to climate change.

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This general limit on supply should help support the prices of existing second homes well into the future.



RELOCATION: REMOTE WORK, SCHOOLS & TAX

The rise of remote work—steady at 20% across Europe in 2024

has helped transform many alpine resorts into year-round communities. Post Covid, professionals and families have been relocating to destinations like Crans-Montana and Verbier, drawn by reliable digital infrastructure, lifestyle appeal, and access to quality international schools.

Verbier International School, offering the English National Curriculum and IB Diploma (fees CHF 30,000–94,800), supports family relocations, making these resorts now viable for permanent residency.

The abolition of the UK's recent 'Non Dom' status has also shifted focus onto alternative tax jurisdictions – particularly for High Net Worth Individuals (HNWIs).

Switzerland's low-tax cantons (e.g., Valais, Vaud) have always been a magnet for HNWIs but Italy is also now getting in on the game with the launch of their Digital Nomad Visa in 2024.

These permanent movers tend to gravitate toward practical, year-round homes in year-round resorts rather than the higher altitude chalets often favoured by second home buyers. This increased diversity among buyers has led to the strengthening of the overall market stability.



THE FUTURE: RESILIENT BUT CAUTIOUS

The alpine property market is poised for growth through 2030, driven by summer tourism's expansion, tight supply, and evolving buyer profiles. Knight Frank's data projects continued price appreciation, with high-altitude and dual-season resorts leading the way.

There is little expectation of any relaxing of second home laws. Indeed, recent protests across Europe suggest that these laws may only become tighter. These regulatory constraints will sustain value growth, while remote work and international buyer interest bolster demand.



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