Alps 2 Alps
The Ski Company

THE ALPS TRANSFER INDEX

2025

A data-driven guide to Alpine transfers — from cost trends to demand hotspots and what makes service actually work

THIS REPORT COVERS:

- Price-to-value comparisons across top routes
- Key tourist flows & market dynamics
- Service benchmarks and client expectations

MORE INFORMATION
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INTRODUCTION

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ABOUT THIS REPORT

As millions of travelers flock to the majestic Alps each year, thousands of travel professionals grapple with the same fundamental questions:

Which destinations are truly the most popular? Where can you get the most bang for your buck? And how are rapidly evolving technologies and economic shifts reshaping the travel landscape?

Until recently, the answers to these questions were often based on fragmented data and subjective opinions.

Who will benefit from this report

Tour operators and hoteliers — to plan logistics partnerships, improve service and select competitive transfer destinations.
Aggregators and booking platforms — as a guide for forming pricing policies and assessing demand.
Transfer company executives — for strategic planning, identifying weak areas and growth points.
Analysts and journalists — as a source of structured, comparable data on the largest destinations in the Alps.
Travelers — to understand what they are paying for and why some transfers work "like clockwork" while others do not.

How to use the report

- Use the **ATI Value Score** section to compare the cost of transfers by destination.
- Go to the **Service Quality** Index to understand where customers are truly satisfied with the service.
- Use **regional comparisons and trends** to adjust your product decisions, targeting and priorities for the 2025/26 season.

Executive Summary

Alpine transfer market: €1.5–2 bn/season.
Median early-booking price: €2.98/km.
Early booking saves: up to 17%.
Service quality led by Swiss/French resorts (SQI 90+).

The Alpine region is not only one of the most picturesque corners of Europe, but also a powerful economic zone: annually it **attracts around 120 million visitors** and **provides more than 330 million overnight stays**.

Tourism generates **up to 15% of employment** in a number of mountain cantons and communes, and transfer services play a systemically important role in ensuring the accessibility of the region and the quality of customer experience.

The Alpine transfer market, **estimated at €1.5-2 billion per season**, has emerged from the post-Covid recovery phase and is demonstrating a sustainable transformation. International tourist **arrivals in Europe reached 101% of the 2019 level**, and key hubs such as Geneva (+8%) and Munich (+12%) are recording a stable increase in passenger traffic.

According to early booking data for January 2026, the median price of a private transfer (sedan, 1-3 passengers) is **€2.98/km**. This value reflects high operating costs, stable demand and increased competition. **Prices range from €2.08/km on highly competitive routes to €3.92/km on routes** with limited supply and premium logistics.

France maintains its dominant position in terms of demand, largely due to the size of its resort areas, proximity to Geneva airport and stable demand from the UK market. However, the growing popularity of Swiss and Italian resorts is recorded both in terms of interest and in terms of service quality.

Consumer behavior patterns are also changing: transfers are increasingly perceived not as a logistics service, but as **part of the overall holiday.**

Expectations for quality, predictability and digital comfort are rapidly increasing. This need for predictability is further emphasized by significant price volatility; our analysis shows that last-minute travelers can expect to pay, on average, **14.5% more** for their transfer compared to early bookers.

Reliability, driver tracking, child seats and flexible conditions have become **standard** rather than an additional option.

In the context of climate instability, high cost of vehicle fleets, competition from trains and car sharing, sustainable growth is possible only with high operational discipline, investments in digital infrastructure and the ability to adapt the service to rapidly changing demands. The winners will be those **who can not only deliver the client, but accompany him at every stage of the route as part of a quality tourist experience**.

CONTEXT: THE ALPS IN SECTION

The Alpine region is a powerful economic engine, annually attracting 120 million visitors and providing more than 330 million overnight stays. This colossal tourist flow, as well as the transfer market of €1.5 - €2 billion per season, directly depend on the geography of demand.

Alps attract 120M visitors annually.
France remains largest market by volume.
Geneva +8%, Munich +12% passenger growth.
Public transport cheapest solo, private transfers win in groups.

Segmentation of the Alps and key tourist flows

The Alpine region is conventionally divided into four main segments, each of which has its own key hub airports and dominant tourist flows

FRENCH ALPS

- Geneva (GVA), Lyon (LYS), Grenoble (GNB) airports
- Passenger traffic at GVA **increased by +8%** in 2024.
- Tourists from the **UK and French** domestic tourism.
- Chamonix, Val Thorens, Morzine.

SWISS ALPS

- Geneva (GVA) and Zurich (ZRH) airports.
- Switzerland's hotel sector **recovered to 41.75 million** overnight stays in 2023, exceeding 2019 levels.
- Tourists from the **UK, Germany, the US** and other countries.
- Zermatt, Verbier, St. Moritz.

AUSTRIAN ALPS

- Munich (MUC), Innsbruck (INN), Salzburg (SZG) airports
- MUC passenger traffic grew by +12% in 2024.
- Dominated by tourists from Germany, Austria and CEE.
- St. Anton, Ischgl, Mayrhofen.

ITALIAN ALPS

- Milan (MXP), Turin (TRN) and Verona (VRN) airports.
- The snow tourism market was forecast to **grow from $4.81 billion (2024) to $5.13 (2025)** (CAGR 6.7%)
- Mixed European flow, including **UK, Germany, and Italian** travelers.
- Livigno, Val Gardena.

Key gateways | Dynamics | Audience | Popular resorts

CONTEXT: THE TRAVELER'S CHOICE

Understanding the Alpine Transport Dilemma

The choice of transport in the Alps always involves a trade-off between cost, convenience, and sustainability.

Private transfers

although more expensive, offer unparalleled convenience and a direct door-to-door service. For larger groups, the cost per person of a private transfer often becomes more competitive.

Public transport (trains, buses)

is the most cost-effective option but frequently requires several transfers and is not always direct, which can be inconvenient, especially with luggage.

Renting a car

provides independence but entails additional costs for fuel, tolls, and parking, as well as the need to navigate winter conditions and traffic regulations.

How Group Size Changes the Value Equation

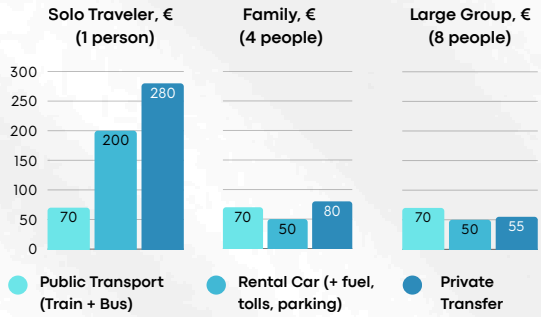
While private transfers have the highest initial cost, their economic efficiency per person increases dramatically with group size, making them the most rational choice for families and groups who value convenience.

For **solo travelers**, public transport is the undisputed economic champion.

However, for **a family of four**, the cost per person for a private transfer becomes comparable to a rental car, while offering significantly more convenience.

For **a large group of eight**, a private transfer in a minibus often becomes the most cost-effective option per person after public transport, eliminating the logistical complexity of coordinating multiple rental cars or train tickets.

Cost per Person for a One-Way Trip



Estimates are for a mid-range, peak-season route (~180km, e.g., Geneva-Méribel). Public transport is a per-person fare. Rental car cost is for a medium vehicle, split among passengers. Private transfer costs reflect market averages for a sedan (1-3), minivan (4), and minibus (8 people).

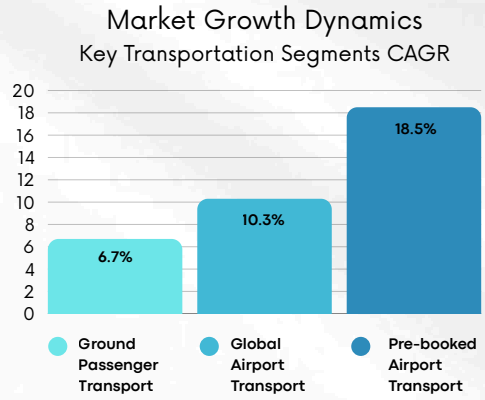
The optimal choice depends on the customer's priorities—**economy, comfort, speed, or flexibility.**

For travelers, the rule of thumb is clear: solo = public transport, groups = minivans, families = private transfers or rental cars.

For providers, this means the winner is not the cheapest offer, but the one **that best matches the traveler's priorities**.

CONTEXT: MARKET SIZE & DYNAMICS

Transfer Market Size and Growth



The broader ground passenger transportation market (including public transportation, taxis, buses) was valued at **$718.23 billion in 2024** and is projected to grow to $1.29 trillion by 2033, with a **CAGR of 6.7%**.

The global airport transfer services market was valued at **$15.55 billion in 2024** and is projected to grow at a **CAGR of 10.3%**. However, the **pre-booked airport transfers market** is showing a significantly higher growth rate, with a projected **CAGR of 18.50%**.

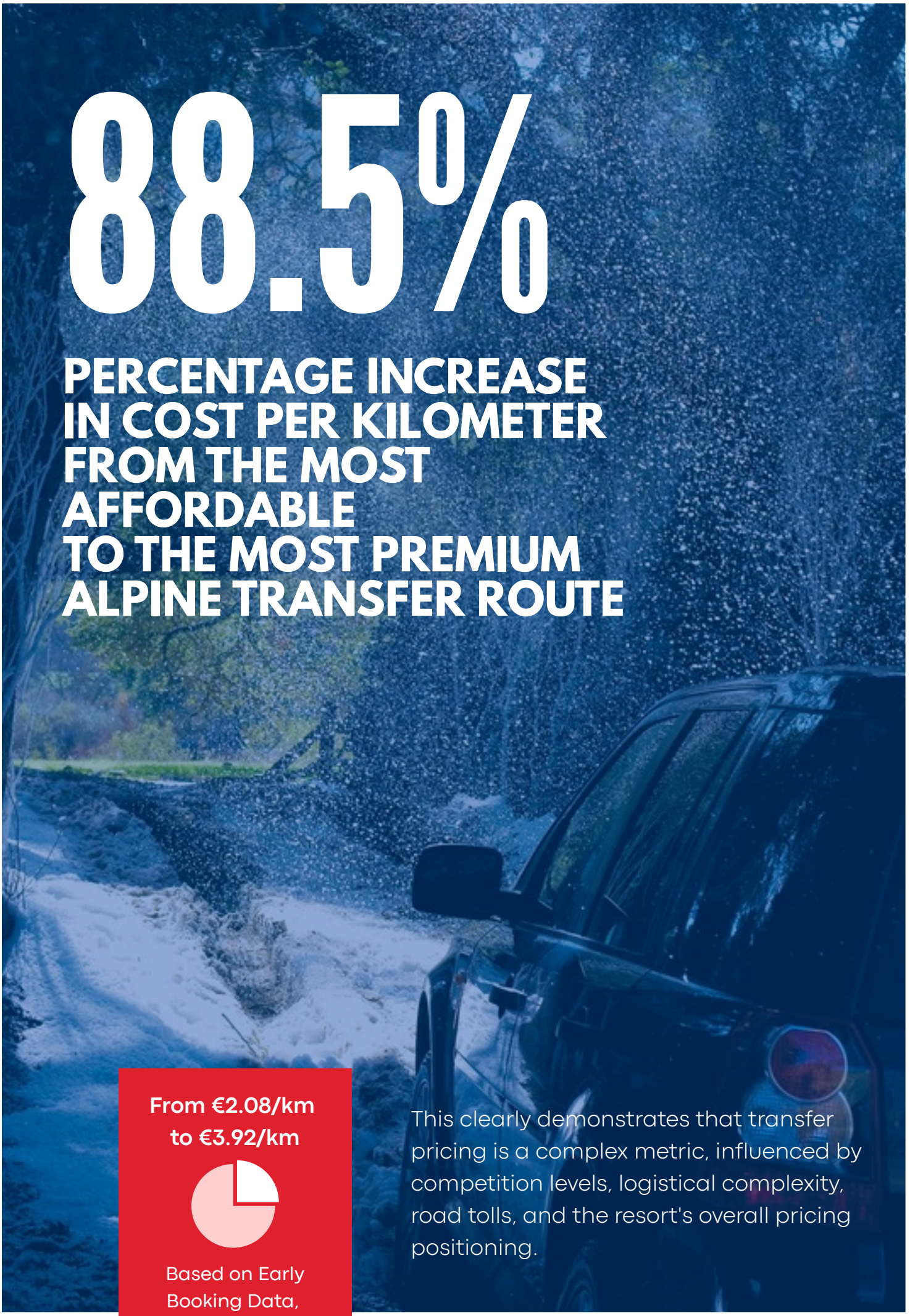
The overall mountain and snow tourism market

Shows strong growth, with its size projected **to increase from $4.81 billion in 2024 to $5.13 billion in 2025** (CAGR of 6.7%), and is expected to reach $6.58 billion by 2029. This growth is driven by rising disposable income, increased participation in leisure activities, and growing interest in adventure tourism.

Recovery and market resilience

Post-pandemic recovery in alpine tourism, with the Swiss hotel sector as an example, having rebounded to 41.75 million overnight stays in 2023, surpassing pre-pandemic levels in 2019. In comparison, U.S. ski resorts are also set to record visitation levels in 2022 and 2023. This highlights the overall resilience of demand for alpine tourism in general, despite external shocks.

The growth in the number of visitors and overnight stays directly increases the pool of customers for transfers. The transfer market has moved from a simple logistics service to competing on the level of value, data and efficiency. The modern Alpine tourist has become more prudent, increasing the planning window and placing higher demands on the quality and predictability of services.



88.5%

PERCENTAGE INCREASE IN COST PER KILOMETER FROM THE MOST AFFORDABLE TO THE MOST PREMIUM ALPINE TRANSFER ROUTE

From €2.08/km to €3.92/km

Based on Early Booking Data, January 2026

This clearly demonstrates that transfer pricing is a complex metric, influenced by competition levels, logistical complexity, road tolls, and the resort's overall pricing positioning.

ALPS TRANSFER INDEX: ATI VALUE SCORE

Transfer Cost Analysis

Median price: €2.98/km (↑ from pre-COVID).
Range: €2.08–€3.92/km.
Austria/Italy = best value,
Switzerland/France = premium.
Innsbruck → St. Anton = cheapest route (€2.08/km).

The **ATI Value Score** is an indicator that allows objective comparison of transfer costs on routes of different lengths. It is calculated as the median market price for a private transfer (sedan, 1–3 passengers) per kilometre.
Data for this report was collected on July 2025 based on early booking scenarios for a standard family ski holiday (24–31 January 2026, 2 adults + 1 child).

ATI Value Score

€2.98

Median price per kilometre (one way)
according to early booking data

For comparison, in 2019–2020, private transfer prices for 2–4 passengers ranged from €1.70 to €3.20/km (e.g. Geneva–Three Valleys). The current €2.98/km median sits at the top of or above the pre-pandemic range, reflecting strong price growth.

This increase stems not only from post-pandemic demand recovery, but also from economic drivers, including:

Inflation

In June 2025, **annual inflation in the Eurozone was 2.0%,** in France 0.9%, in Germany 2.0%, in Italy 1.7% and in Austria 3.3%. In Switzerland, inflation was significantly lower at 0.1%.

Fuel prices

Petrol prices in the Eurozone, July 2025		
Country	**Petrol prices (EUR/litre)**	**Diesel prices (EUR/litre)**
Switzerland	1.88	1.96
France	1.65	1.69
Germany	1.68	1.62
Austria	1.53	1.54
Italy	1.73	1.67

Operating cost increases

Price increases are driven by increased driver salaries, insurance premiums, fleet acquisition and maintenance costs and road tolls, which are also subject to inflationary pressures and regional specifics.
For example, **commercial vehicle insurance costs** in Europe have increased by **10-15%** over the past year, while vehicle maintenance and repair costs **have increased by 5-8%**.
Driver salaries in key Alpine countries have also **increased by 3-7% annually** in recent years due to a shortage of personnel.

ALPS TRANSFER INDEX: ATI VALUE SCORE

Price dynamics by Alpine segment

Transfer cost analysis highlights not just route-level differences, but also regional variations across the Alps driven by competition, logistics, and resort positioning.

French Alps

Prices remain high despite competition, due to the premium image of resorts like Courchevel and Megeve and logistical challenges.

For example, routes to resorts such as **Avoriaz (€3.64/km)** can be expensive due to their car-free status, requiring additional transfers or specific permits for transfer companies to the nearest drop-off points. High traffic during peak seasons also increases travel times and, accordingly, costs. The **Geneva (GVA) → Chamonix (€3.26/km)** route, despite its popularity, remains high-priced.

Swiss Alps

Historically the most expensive region. Transfers like **Zurich → Engelberg (€3.63/km)** and **Zurich → Laax (€3.70/km)** illustrate this.

High operating costs, tolls, and strict environmental rules push prices up. Premium resorts like **St. Moritz (€3.30/km)** and **Verbier (€3.04/km)** justify higher tariffs. **Geneva → Zermatt (€2.98/km)** seems comparable to the new median per km but includes a mandatory train transfer from Täsch, adding time and hassle—factors that affect actual affordability.

Austrian Alps

This region offers some of the best value transfers in the Alps, due to high competition and a well-developed infrastructure.

Routes such as **Innsbruck (INN) → St. Anton (€2.08/km)**, **Munich (MUC) → Ischgl (€2.23/km)** and **Munich (MUC) → Mayrhofen (€2.42/km)** offer attractive prices, making Austria a popular choice for cost-conscious travelers.

Italian Alps

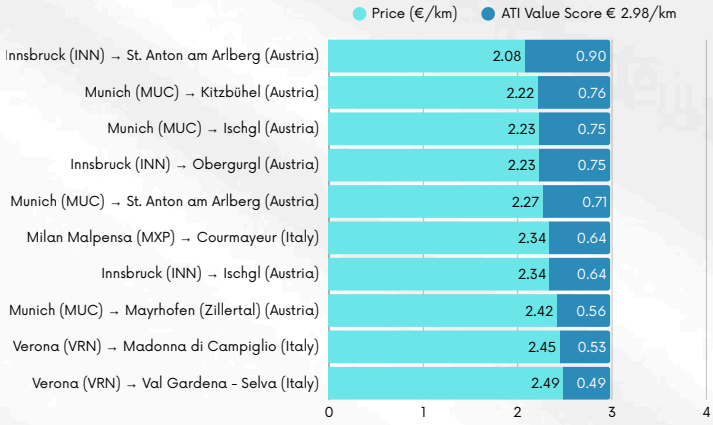
These present a mixed picture when it comes to pricing. Some routes, such as **Milan Malpensa (MXP) → Livigno (€2.73/km)**, are highly competitive, partly due to Livigno's duty-free status, which attracts a large volume of tourists and therefore transfers.

Routes from **Verona (VRN) to Madonna di Campiglio (€2.45/km)** also offer good value for money. However, longer or less busy routes in the Dolomites may be less favourable due to less competition and greater logistical complexity.

Austria and Northern Italy offer the best-value transfers (e.g. Innsbruck → St. Anton €2.08/km), while French and Swiss routes remain premium, with Grenoble → Les Deux Alpes topping €3.92/km.

ALPS TRANSFER INDEX: ATI VALUE SCORE

Top 10 Best-Value Alpine Routes

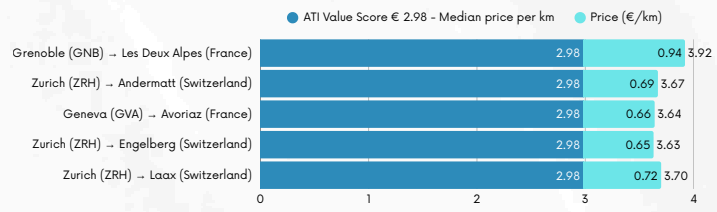


The chart shows the routes with the **lowest transfer costs per 1 km** at the current early level. **The ATI Value Score shows the relative deviation from the market average** (2.98 €/km): the lower the index, the better the offer compared to the average price.

Austria and northern Italy are the leaders in terms of transfer benefits: **all 10 of the best-value routes are below €2.49/km**, with **Austria securing 7 out of 10 positions**.
The most affordable route is Innsbruck → St. Anton (2.08 €/km).

The deviation from the median ATI Value Score on all routes is **below 1.0 €/km**, which confirms that on these routes the customer gets the best "price response" per kilometer when booking early.

Top 5 Premium Alpine Routes



The chart shows the routes with the **highest price per kilometre** — all of them exceed the median market price of €2.98/km.

As expected, the most expensive destinations are French and Swiss resorts.

For example, a transfer **from Grenoble to Les Deux Alpes (€3.92/km)** is among the highest-priced per kilometer. The reasons for these elevated costs often include a resort's car-free status (requiring additional transfers), the need for multimodal transport, and high seasonal occupancy.

All routes in this segment significantly exceed the median market price of €2.98/km.

The cost of a transfer in the Alps is determined by the intersection of three forces: competition, logistics and resort image. The most expensive destinations are not always the best quality.

HOW CAN ATI BE USED IN PRACTICE?

Let's say you are
a hotel in Meribel.

Knowing that your customers mostly come from Geneva, you see:

The cost of a transfer on this route is above the median. But the resort's service quality index is average. This is a signal: **your customer may arrive with tired drivers, at an inconvenient time, or after complex logistics**.

So, it is worth considering: alternative providers, special welcome services, or even your own shuttle project with fixed terms.
ATI turns subjective customer experiences into strategically applicable analytics.

ALPS TRANSFER INDEX: THE PRICE OF WAITING

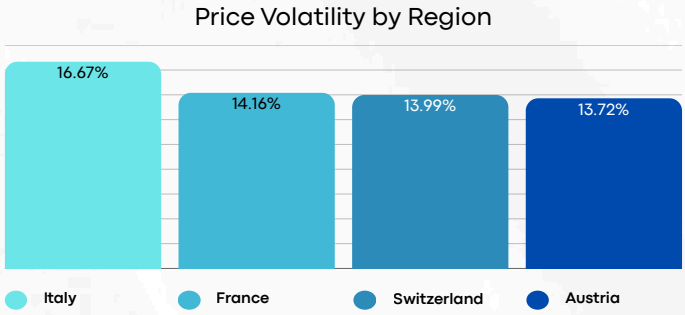
Early Booking vs. Late Booking

Median late booking premium: +14.5%.
Italy = most volatile (+16.7%).
Austria = most stable (+13.7%).
Waiting 2 weeks = extra ski pass cost.

An analysis of pricing dynamics reveals a clear pattern similar to the yield management models used in the airline and hotel industries: **the closer the travel date, the higher the price**.

Our forecast, based on historical booking data, shows that a family booking a round-trip transfer two weeks before their trip could pay, on average, **14.50% more** than those who book six to eight months in advance. The range of price increases varies from **12.05% to 17.81%**, reflecting the varying competitive landscapes and operational specifics of each region

Average Forecasted Price Growth Rate on Round-Trips by Alpine Region



Analysis of retrospective data and median market prices across 50 reference routes. Compares prices on July 10, 2025, with forecast prices for Jan 10, 2026, for a trip on Jan 24-31, 2026.

- **Italy: +16.67% — Highest Volatility.**

A mixed market where intense early-bird competition on some routes is balanced by logistical complexity on others, resulting in the most significant price increases.

- **France: +14.16% — Stable & High Growth.**

A mature, high-volume market. Prices start high and predictably increase as the peak booking window for school holidays closes.

- **Switzerland: +13.99% — Stable & Low Volatility.**

Prices are already at a premium "ceiling," so the relative percentage increase is smaller, although the absolute cost of waiting remains significant.

- **Austria: +13.72% — Lowest Volatility.**

Highly competitive and well-developed infrastructure keep initial prices low, and the market shows the least fluctuation as the travel date approaches.

Travelers booking for Italy and France gain the most significant financial advantage by planning ahead, as these markets show the highest price volatility.

The Swiss and Austrian markets, while having the lowest percentage increase, remain highly sensitive to late booking as well.

ALPS TRANSFER INDEX: THE PRICE OF WAITING

Price Volatility: The Most and Least Stable Routes

The regional averages are driven by the specific characteristics of individual routes. A route-level analysis highlights the market forces at play, revealing where competition is fiercest and where premium positioning dictates pricing.

Routes with the Highest Price Volatility

(Where waiting costs the most)

MUC → Mayrhofen (Zillertal)	**+17.81%**
GVA → Avoriaz	**+17.80%**
BGY → Passo Tonale	**+17.66%**

Maximum price growth is observed on routes with a combination of high-demand, high-complexity logistics, and a "low base effect" driven by intense early-bird competition. The routes to Mayrhofen, Avoriaz, and Passo Tonale are classic examples of this dynamic, where **initial low prices give way to a significant last-minute surge.**

Routes with the Lowest Price Volatility

(Where prices are most stable)

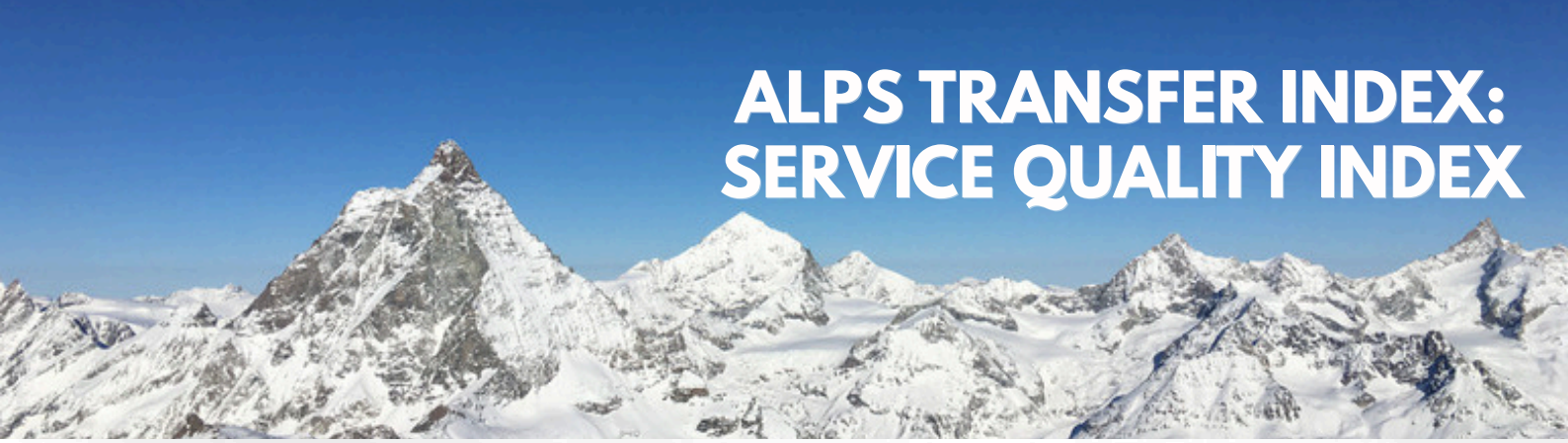
GVA → Crans-Montana	**+12.05%**
INN → Obergurgl	**+12.37%**
TRN → Courmayeur	**+12.60%**

Minimal price growth is typical **for premium Swiss resorts** (e.g., Crans-Montana), where prices are already high, and for local routes from secondary airports (e.g., Innsbruck → Obergurgl), where the market has a stable, high-density supply, reducing price fluctuation.

Tip for travelers

Italy and France are the most "expensive to wait" markets — early booking can save you the price of an extra ski pass or dinner for four.

The "price of waiting" is not a uniform tax on procrastination but a complex market indicator. High price volatility is a sign of a highly competitive mass-market route, while low volatility often signifies a stable, premium-priced market.
Understanding this dynamic is key to making economically rational booking decisions.



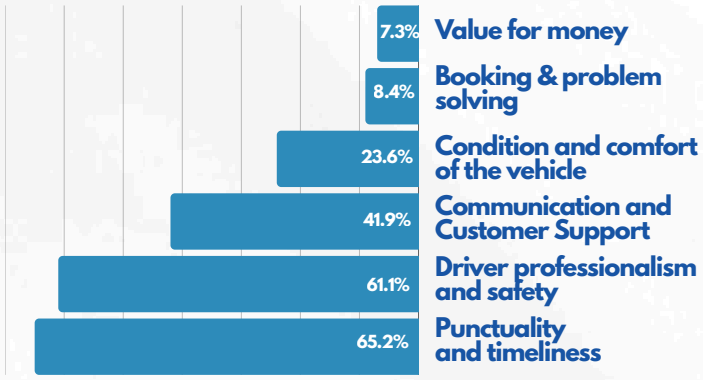
ALPS TRANSFER INDEX: SERVICE QUALITY INDEX

The Importance of Transfer Quality to the Travel Experience

The quality of the transfer service is critical to the overall ski holiday experience. It includes punctuality, safety, communication and value for money. A failure in any aspect can negatively affect the entire holiday.

The **Service Quality Index** is an integrated indicator based on the analysis of thousands of public reviews. Unlike the assessment of companies, our index focuses on the quality of service on a specific route, taking into account logistical complexity, workload and local features.

Analysis of customer experience aspects in transfers (based on reviews)



The frequency of mentions of key aspects of the service in detailed customer reviews containing specific details.

Distribution of weights by key categories for calculating the index

While the chart above shows the frequency of mentions of aspects in reviews, the weights for the ATI SQI reflect the structure of customer dissatisfaction and the criticality of the factor to their experience.

These weights are assigned based on an analysis of the impact of each factor on the overall perception of service and the severity of problems.

- **Punctuality and reliability - 30%**

The most critical aspect, as lateness causes a cascade of problems and stress. Almost two-thirds of negative reviews (more than 60%) begin with complaints about lateness.

- **Driver professionalism and safety - 25%**

The behavior and professionalism of the driver directly affects safety and trust. Its weight reflects the absolute priority of trip safety.

- **Communication and support - 20%**

Effective communication is critical, especially during breakdowns. Communication problems often lead to extremely negative ratings.

- **Car condition and comfort - 15%**

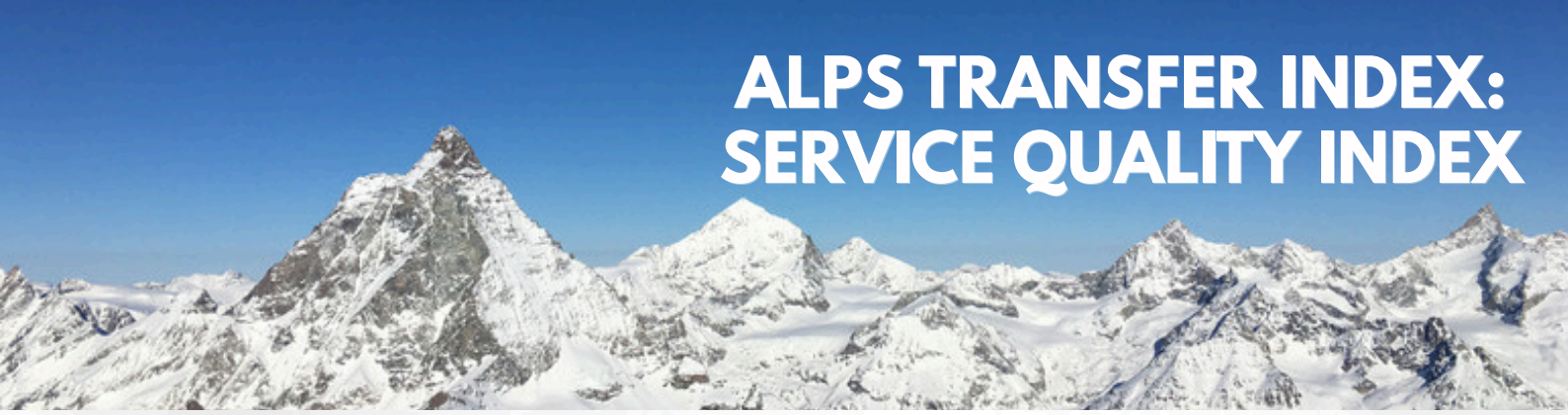
Assesses the suitability of the car, the cleanliness of the interior, the presence of child seats and luggage space. Mentioned in 23.6% of reviews.

- **Booking and refunds - 5%**

Ease of booking and adequate support in emergency situations. Mentioned less often (8.4% of reviews), but leaves a significant mark when problems occur.

- **Value for money - 5%**

Perception of fairness of service price. Least mentioned factor (7.3%), indicating adequate perception of price in the absence of other problems.



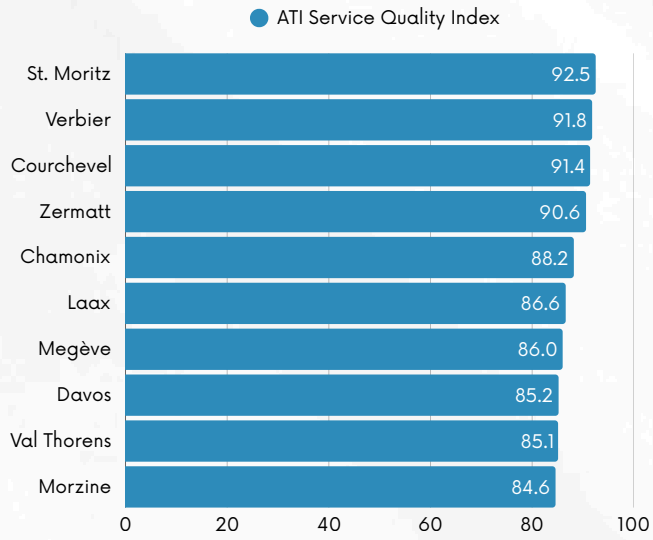
ALPS TRANSFER INDEX: SERVICE QUALITY INDEX

ATI Service Quality Index: Results and Insights

St. Moritz tops SQI (92.5).
Swiss/French dominate Top 10.
Italian resorts absent from Top 10.
Delays & driver shortages = key pain points.

In 2025, the quality of transfer service ratings are headed by resorts in Switzerland and France, confirming their reputation as destinations with high service standards.

Top 10 Resorts by Transfer Service Quality



The top 10 resorts ranked by their ATI Service Quality Index score, reflecting overall transfer service quality

Swiss and French resorts lead on transfer quality — St. Moritz (92.5), Verbier (91.8), and Courchevel (91.4).Transfers here are praised for punctuality, professionalism, and comfort. For car-free Zermatt (90.6), the convenience of the Täsch connection is especially valued.

High-volume destinations such as Chamonix (88.2), Megève (86.0), Val Thorens (85.1), and Morzine (84.6) also perform well, but face pain points: delays, driver shortages, and occasional vehicle issues.

These reflect the challenges of peak demand and complex logistics rather than poor operators.

Italian resorts are absent from the Top 10, but overall analytics show that predictability and reliability are valued across all Alpine destinations.

Unlike traditional company ratings, the ATI SQI focuses on routes, not brands. This reveals where specific bottlenecks exist — from lack of drivers to infrastructure limits — and highlights both excellence and areas for improvement.

FUTURE TRENDS & CHALLENGES

Key Trends

Flexibility now a standard expectation
Demand shift → EVs, group shuttles
Major events 2026: Olympics, Tomorrowland
Empty leg rates 35–55% = major cost driver

The Alpine transfer market is undergoing a transformation: **familiar expectations are changing and new habits are taking hold**. Customers are increasingly choosing not just transport, but an experience – with flexibility, comfort and a responsible approach to the environment.

Greening

Demand for group shuttles and electric vehicles is growing, driven by both environmental regulations and changing consumer preferences. Companies are actively working **to minimize their environmental impact** by using bus transportation and introducing electric/hybrid lifts.

Smart Value

Customers are looking for the **best value** for money, where predictability, safety and comfort become key triggers for choosing a transfer, and not just the lowest price.

Demand model transformation – from a "trip" to an "experience

Customers expect transfers to be more than just a functional trip, but **part of the overall holiday experience**, with individualisation and information (push notifications, trip map, one-click cancellation and pricing).

Flexibility as standard

Consumers accustomed to **flexible booking conditions** in the airline and hotel industries after the pandemic expect the same from transfer companies. Uncertainty of plans and weather conditions force customers to look for options that minimize risks.

Seamless experience & personalization

Customers increasingly expect that the transfer will not just be a trip, but an **integrated and comfortable part of their journey**. Demand for additional services (car upgrades, drink orders, child seats, Wi-Fi) and integrated solutions (B2B integrations with hotels, package deals) is growing.

Event Tourism

Major events such as the 2026 Olympic Games in Italy (6–22 February 2026) and Tomorrowland Winter (March 2026) will significantly impact demand, creating cluster peaks and requiring special logistics strategies.

Increasing pricing complexity

Fixed costs (insurance, licenses, technical inspection) are expected to **increase by 5-7% per year**, which will likely outpace inflation. There is a risk of dumping by online aggregators and a reduction in the driver pool.

FUTURE TRENDS & CHALLENGES

Challenges and Uncertainties

Even as demand grows and opportunities emerge, the alpine transfer market faces a number of systemic constraints.

Climate instability

Reduced natural snowfall leads to shorter ski seasons, operational difficulties for low-lying resorts and lower tourist satisfaction. Increased geological risks such as landslides and floods require investment in safety technologies.

Competition from substitutes

The growing popularity of high-speed trains and car sharing on some routes, as well as car rental, pose serious competition.

Regulatory pressure

The Alpine Convention and EU directives actively promote sustainable transport modes, aiming to shift freight and passenger transport from road to rail and avoiding the construction of new large-scale roads.

Operational anomalies

Strikes (SNCF, Lufthansa, Deutsche Bahn), climate disruptions and airport congestion create bottlenecks and require flexible company responses.

Empty Legs

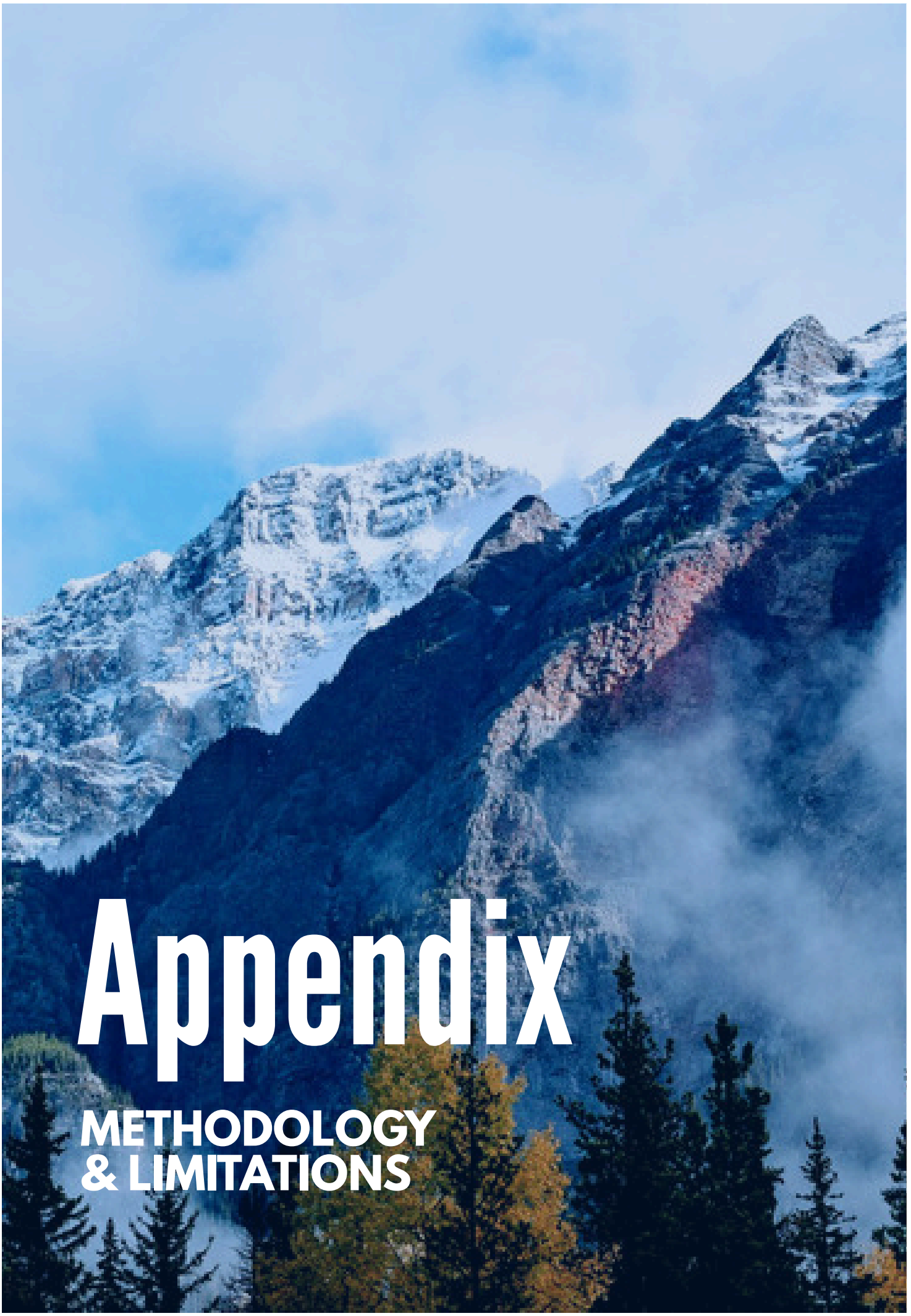
Empty leg rates of 35-55% structurally inflate the cost of each trip, posing a major operational challenge for transfer providers.

Outlook

We forecast further **market consolidation** around technology platforms and increased competition in the B2B segment.

Operators that can combine technology, operational efficiency and high levels of reliability will strengthen their position. **Investments in safety technologies and sustainable infrastructure** will be critical to ensuring operational continuity and maintaining traveller confidence.

Future success will depend on the ability of stakeholders to innovate and invest in solutions that simultaneously **improve customer digital experiences**, **reduce environmental impact and increase resilience to external shocks.**



Appendix

METHODOLOGY & LIMITATIONS

METHODOLOGY OF THE ALPS TRANSFER INDEX

The Alps Transfer Index (ATI) is designed as a comprehensive, data-driven tool to improve transparency in the Alpine transfer industry. The report focuses on the methodology of two key indicators: the ATI Value Score and the ATI Service Quality Index.

ATI Value Score

ATI Value Score objectively compares the cost of transfer services on Alpine routes to determine cost effectiveness.
Data was collected on **10-11 July 2025** by manually scraping the web resources of **11 leading transfer companies**. The sample of companies covered international aggregators, large regional operators, premium services and hyper-local specialists, ensuring market representativeness.

The booking scenario was based on **a standard week-long ski holiday from 24 to 31 January 2026 for a group of 2 adults and 1 child (7 years old)**, representing the economically significant family tourism segment.

50 diversified routes were selected based on strategic principles, including highly competitive (GVA – Chamonix), fast-growing (from MUC and TRN), high-margin (ZRH – St. Moritz) and routes from secondary hubs (GNB, BGY, VRN) for full geographical coverage.

The cost per kilometer for each route was calculated using the formula:

Cost per km =
Average Round-Trip Transfer Price / 2) / Actual Distance (Airport - Resort)

The ATI Value Score for the analysis is formed as the median value of these individual costs per kilometer for the entire sample. Using the median increases the robustness of the indicator to price outliers.

The pricing context also includes external macroeconomic factors: current fuel prices (July 2025) and annual inflation (June 2025) in key Alpine countries, as well as the dynamics of operating expenses (driver salaries, insurance premiums, fleet maintenance).

Limitations

- Booking scenario specifics.

Based on early bookings for a specific period (end of January 2026) and group composition (2 adults, 1 child). This does not fully reflect price dynamics for later bookings, other seasons, or different group sizes.

- Data collection method (manual parsing).

Limits the scope of routes and companies analyzed compared to automated systems. The 50 routes and 11 companies analyzed are representative, but not exhaustive, of the market.

- Exclusion of other modes of transport.

The analysis focuses only on private transfers (sedans, 1-3 passengers), excluding shuttles, public transport, or car rentals, which may offer different value for money.

- Price dynamics.

The market is volatile. Data collected on July 10-11, 2025 is a snapshot at a specific point in time and may not reflect subsequent fluctuations.

METHODOLOGY OF THE ALPS TRANSFER INDEX

Forecasting Late Booking Prices

The forecast for late booking prices was developed using a retrospective methodology. This involved analyzing historical price data from the previous year, comparing the growth observed between early bookings (summer) and late bookings (winter) for similar dates and routes. A historical growth coefficient was calculated from this data and then applied to the current year's early booking prices (collected on July 10-11, 2025) to project a reliable late-booking price for the period of January 2026.

This approach, while based on historical trends, provides a valuable and actionable forecast for market participants. It allows for a nuanced assessment of how a route's operational specifics and competitive landscape influence its price volatility, highlighting where the most significant savings can be made through early planning.

Limitations

- Reliance on historical trends: The forecast assumes that the market dynamics and price increase patterns of the previous year will largely hold true for the upcoming season. Unforeseen market shifts, economic changes, or major events could influence actual price volatility.
- A projection, not a guarantee: The figures presented are forecasts and should be treated as a guide. They do not account for real-time, minute-by-minute price fluctuations that are common in a dynamic, yield-managed market.
- Specific scenario: The forecast is based on a specific booking scenario (private transfers for a family trip in late January). The price dynamics for different group sizes, vehicle types, or other periods of the season may vary.

METHODOLOGY OF THE ALPS TRANSFER INDEX

ATI Service Quality Index

The ATI Service Quality Index measures the quality of transfer services, taking into account logistical complexity and local features of routes, going beyond traditional corporate ratings.

The ATI SQI methodology is based on the analysis of a large array of customer data. Initially, about **30 thousand reviews** were parsed from public platforms such as TripAdvisor, Trustpilot and Google Maps.

After collection, the data was subjected to multi-stage pre-processing and semantic analysis. Natural language processing (NLP) methods, including tokenization, lemmatization and the use of pre-trained embeddings, were used to extract meaningful context and key phrases. Reviews without detail (general emotional assessments) were excluded, focusing on those that provided specific information about the experience (e.g. "driver was 15 minutes late", "child seat was installed incorrectly").

The analysis resulted in a **high-quality sample of just under 7,000 detailed reviews**, which were also geographically linked to specific Alpine resorts, allowing for geo-analysis and calculation of quality indicators for each destination.

The selected sample was segmented to identify **six key service quality factors**. Based on the frequency of mentions and their criticality for customer experience, these factors were assigned weights determined by quantitative analysis of the correlation between the mention of the aspect and the overall sentiment of the review, as well as an expert assessment: Punctuality and reliability (30%), Driver professionalism and safety (25%), Communication and support (20%), Car condition and comfort (15%), Booking and refunds (5%), Value for money (5%).

ATI SQI results reflect the quality of transfers across destinations, identifying both destinations with exemplary standards and those where operational or logistical challenges lead to pain points in the customer experience. This approach provides a realistic picture and highlights areas for service improvement.

A low ATI SQI score does not always indicate poor operator performance. More often, it is a consequence of complex logistics, a shortage of drivers or infrastructure limitations. The index emphasizes that service quality is a combination of context and unique route factors. Therefore, route (and not brand) analysis provides an accurate picture of the real situation and allows identifying problems and opportunities for improvement.

Limitations

- Reliance on public reviews.

The ATI SQI relies on subjective and potentially biased user reviews that may not reflect the "average" experience and may be motivated by extreme experiences. Demographics and languages of the authors may affect representativeness.

- Limited context.

Despite semantic analysis, not all nuances of service quality can be adequately described in short reviews.

- Uneven distribution of reviews.

The number of reviews tied to resorts (5-7 thousand) may be uneven, potentially affecting statistical significance for less popular destinations.

- Subjectivity of weights.

The weights, although based on review analysis data, include an element of expert interpretation. The lack of external independent data on real incidents (e.g. official lateness statistics) is an inherent limitation of a review-only methodology.

About Alps2Alps

Alps2Alps is a transfer service that grew out of an understanding of how important the road to the mountains is, especially in those rare moments when a long-awaited vacation begins. Our deep expertise, honed over many years in the Alps, has taught us that the trip from the airport to the resort is not a formality, but **part of the overall experience**.

Calm, predictability, care—what a traveler in the mountains expects should begin from the very first meeting.

Our Alpine heritage has been the foundation for our global expansion. Today, Alps2Alps serves **more than 500+ resorts**, not only in our heartlands of France, Italy, Austria, and Switzerland but in **key mountain destinations all over the world**.

In 2024, we handled **over 20,000 unique bookings**, which translated into **more than 34,000 individual transfers**—from the largest international hubs to the most secluded resorts. More than **70%** of all our trips were to twenty key destinations.

We work with **both private clients and B2B partners**—from tour operators to hotels—which allows us to deeply understand the seasonality, behavioral characteristics, and expectations of different audiences.

We are proud of our **high level of customer satisfaction** and recognition on the largest platforms. Alps2Alps is among the leaders in the ratings on TripAdvisor and other independent resources.

At the core are simple but important principles, embodied in our service:

- **Flexibility**: We offer flexible booking conditions, transparent prices with dynamic pricing, discounts of up to 50% for off-peak hours, and clear cancellation conditions.
- **Family-Friendliness:** We know that traveling with family requires special attention to detail. That's why we provide free child seats and our drivers are always ready to help with luggage.
- **Transparency and Support**: Our loyalty program rewards returning clients, and our 24/7 customer support team is always available. Our app allows you to track your trip in real time and quickly contact the driver.

We hope that this material **will be useful for those who are as attentive to travel as we are**—whether it is planning a trip, a business strategy, or simply a desire to better understand the Alpine map of the next season.

Alps 2 Alps
The Ski Company