BUILDING SUSTAINABLE MOUNTAIN COMMUNITIES
issues and insights

By Philippa Thomas and Roslyn Russell
TECHNICAL REPORTS

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SUMMARY

Mountain tourism is an important and distinctive economic activity in Australia. Sustainability of mountain resorts is dependent upon how the impacts of climate and market changes are managed. The development of summer tourism is the key strategy that many mountain resorts are using to mitigate the effects of longer summers and unpredictable snowfalls. While an understanding of the demand side (the visitor or potential visitor) is essential in attracting a market outside winter, an examination of the supply side is equally important in matching the provision of facilities, amenities and activities with the perceived needs of the market.

The Mt Buller Resort Management Board is a partner in this project. Part of the charter of current resort management boards in Victoria is to not only support the existing and traditional focus of operations on the winter but to foster the increased usage of the resorts outside the winter season (Alpine Resorts 2020 Strategy).

Objectives of Study
The primary aim of this study is to explore the feasibility of mountain resorts as sustainable year-round tourism destinations. To meet this aim, two studies were conducted. Firstly, an examination of the supply side perspective of mountain resort operations was seen as a useful starting point in determining the desire for and ability to provide year-round offerings at one resort in Victoria, Australia (Chapter 1). Secondly, we explored international examples of mature mountain resorts that have evolved from single season resorts to year-round destinations (Chapter 2).

Chapter 1
- To gauge the opinions of a range of stakeholders of Mt Buller resort regarding potential year-round tourism.
- To identify the challenges and opportunities in developing sustainable year-round resort operations.

Chapter 2
- To identify from international mountain resorts, common strategies used to develop year-round tourism.
- To identify the challenges and opportunities in developing sustainable year-round resort operations.

Methodology

Chapter 1
The first study consisted of an extensive qualitative survey (87 respondents) across a range of stakeholder groups at Mt Buller. The stakeholder groups included a sample of respondents from club member lodges, private apartments, hotels, restaurants and retail outlets. The data was analysed using Nvivo, to identify common themes in responses. The study design was developed in consultation with Mt Buller Resort Management personnel, who provided the database from which the sample was drawn.

The survey consisted of a mix of face-face-interviews, telephone interviews and email responses. The questionnaire was semi-structured, covering a number of aspects regarding the concept of extending the winter season to include a summer product (see Appendix A).

Chapter 2
Five resorts in North America were chosen as suitable case studies, all fulfilling the requirement of being very popular traditional ski resorts that have subsequently become successful year-round resorts with a broad range of activities and facilities being offered to the visitor throughout the year.

Senior management of ski-lift companies, resort management boards and Chambers of Commerce were contacted requesting interviews based on a predetermined range of issues (see Appendix B). The Resort Management Board at Mt Buller contributed additional questions to the final list of questions based on their particular interests in issues such as the establishment of permanent communities in ski resorts. The aim of this part of the study was to identify common strategies in the management of these resorts, the types of product available to attract visitors and the challenges each resort encountered in the broadening of their appeal from winter only to year-round.
For consistency in reporting, to aid comparisons and to help identify any similarities in operations a list of semi-structured questions was asked of each interviewee or group of interviewees at each ski resort. These interviews were all taped using a digital voice recorder, responses transcribed and subsequently sorted into themes and summarised as follows.

Key Findings

Chapter 1
The findings from the first study revealed that there is considerable support for year-round tourism development at Mt Buller. However there are a range of challenges that are impeding year-round tourism including the lack of infrastructural support and services for summer tourism, perceived lack of demand for the mountain as a summer destination, and perceived constraints imposed by existing governance arrangements. The respondents also identified a range of opportunities for summer tourism, such as further promotion of the unique aspects of the destination and development of a range of activities and events to appeal to a broader market.

Chapter Two
The findings from the study of the North American resorts revealed some common approaches to developing year-round tourism. While the North American case studies, in terms of scale of resorts and size of the markets are not comparable to the Australian context, the overall strategic direction provides relevant learning. The entrepreneurial drive and enthusiasm of management, the broad range of activities and facilities provided, the importance placed on community consultation, the involvement of ski lift companies in realising a summer product, the importance given to market research and identifying appropriate markets for a summer product all contribute to their success. For example, early success was often attributed to staging quality events attracting new markets.

Similarly, the North American resorts also find it challenging to grow a market that is different to their traditional winter market. In addition, other challenges are in changing perceptions of being expensive, inaccessible and lacking in activities and also increasing the youth market outside of winter.

Future Action
This research has identified a general willingness to see the resort move towards becoming a more vibrant, active resort. A community think tank should be established consisting of representatives from each of the identified stakeholder groups (club lodges, private apartments, commercial operations, resort management board) to determine a path forward addressing the key concerns (many related to levies and charges) hampering such a move.

The Resort Management Board of Mt Buller needs to address the perceptions related to the governance of the resort including common concerns about operational costs. While the Board defends its position in this regard, the community who are responsible for delivering the product so necessary to year-round operations must have their questions answered and possible solutions provided to encourage further commitment.

Australian ski resorts should examine the common elements in the success of North American resorts and determine which aspects of these resort offerings could be replicated in Australian ski resorts.
Chapter 1

STAKEHOLDER SURVEY, MT BULLER

Introduction

This chapter will examine the supply side of the issue of building sustainable mountain communities. Previous research (Russell, Thomas & Fredline 2005) examined the demand side - visitor and non-visitor perceptions of summer tourism in the mountains. Funded by the Sustainable Tourism CRC (STCRC) and an industry partner, the Resort Management Board at Mt Buller, the study was driven by the need to investigate the viability of year-round destination development due to changing climate, shorter winters and the extended time that infrastructure and facilities are underutilised during the summer months. Year-round tourism in the mountains has been identified as a key strategy by the state government in the Alpine Resorts 2020 Strategy for the future of mountain resorts in Victoria. Our contention is, if year-round destination development is to be a major goal of mountain resorts, then the opinions, thoughts and perspectives of the stakeholders upon whom this goal depends need to be identified.

It is not just the state government that desires year-round tourism; many stakeholders also recognise the need to make better use of the infrastructure for longer periods.

‘It is an enormous economic waste to have many millions of dollars of buildings (i.e., beds) only being used for 2-3 months of the year. We must encourage summer usage to defray the high fixed costs’ (Club member).

‘The use of facilities year round spreads the costs and justifies the investment in infrastructure. Nothing can be justified for just 10 weeks of the year. Used year round also keeps the mountain and its obvious summer benefits in the public eye and mind’ (Club member).

Objectives

The primary aim of this study is to explore the feasibility of mountain resorts being sustainable as year-round tourism destinations. The first step in addressing long-term sustainability for isolated seasonal communities is to understand the perspectives of the community. Specific objectives include:

- To gauge the opinions of a range of stakeholders of Mt Buller resort regarding potential year-round tourism
- To identify the challenges and opportunities in developing sustainable year-round resort operations

There is little evidence (apart from anecdotal) of any attempts to survey the views and interests of relevant stakeholders. Therefore a survey of a cross-section of stakeholders (private apartment, hotel and retail owners as well as club representatives) is important in gauging the degree of support for, and concerns about year-round viability.

Literature Review

The sustainability of mountain resorts encompasses the issue of seasonality to a large degree. The body of literature surrounding seasonality in tourism raises a number of issues which are pertinent to the current research. The notion of developing strategies to promote mountain ski-resorts as year-round destinations has implications as far reaching as small business management (Getz & Nilsson 2004) and employment (Ball 1988; Ashworth & Thomas 1999). While some of these factors do intersect and affect the current report, the chief aim of this review is to highlight some of the pertinent issues surrounding seasonality in tourism and their impacts within the context of promoting year-round tourism in ski resorts. Issues such as global climate change, which have been foremost in the current body of tourism literature, have direct relevance to the case studies of Australian and North American ski resorts presented herein.

‘Seasonality’ is the most widely used and accepted term which describes the phenomenon of high volumes of tourism demand in a destination for only certain periods during the year. In spite of the volume of research on the topic, (Koenig & Bischoff 2004) assert that there is a dearth of explicit writing in terms of the precise compositional elements of tourism seasonality, and contend that there is no precise definition of this effect. Likewise Butler (2001) argues that in spite of the volume of research present in the tourism literature, a scarcity of knowledge remains regarding such aspects as accurately measuring the phenomenon and reasons for its persistence. It could be convincingly argued that no such explicit parameters regarding this phenomenon exist due to the different points of view of stakeholders (e.g. business owners, environmentalists) and the unique
Factors and circumstances which generate such fluctuations in specific destinations. While a complete analysis of this issue is beyond the scope of the current research, it is sufficient to conclude, along with Jang (2004) that seasonality remains one of the most challenging issues in contemporary tourism, and one of the lesser understood.

Since the advent of this branch of tourism research, which was essentially instigated by BarOn (1975), it has become widely accepted (Baum & Lundtorp 2001; Butler 2001; Koenig & Bischoff 2004) that tourism seasonality has two overarching catalysts; climate and the calendar. In the first instance, into which ski resorts can be categorised, tourism numbers vary wildly according to the climatic conditions which typically attract visitors. While in this context it includes skiing and snowboarding, it is also comparable to the activities which are enjoyed by tourists who are drawn to warmer climates. In the latter case, seasonality can be dictated by socio-religious factors ranging from school holidays to ethnic festivals and events or religious occasions. Seasonal variation in tourism demand can thus be seen as being caused by ‘natural’ or ‘institutionalised’ tourism variation (Bar-On 1975; Hartmann 1986; Baum & Lundtorp 2001), of which the former is relevant to the current discussion.

Clearly ski resorts, like warmer (e.g. beach-side) destinations are heavily reliant upon, and thus to a certain extent, limited by, weather conditions to attract tourists (Pearce, Morrison & Rutledge 1998). In response to this, a significant volume of literature has focused upon strategies to mitigate seasonality effects by attracting visitors to weather-specific destinations in the lower seasons (the periods less commonly associated with tourism-oriented travel to these areas). As Baum and Lundtorp (2001) contend, seasonality is an incommendable issue from both a marketing and operational perspective, and one which has traditionally been addressed in two inextricably linked ways: by ‘expanding the season’ (Pearce et al. 1998); and by trying to develop new markets to attract revenue throughout typically low tourist seasons. In the specific case of ski-resorts, challenges exist in areas such as marketing alpine destinations for sports such as hiking or mountain-biking to attract summer holiday tourists (Blevins 2004), or for ostensibly different purposes such as the MICE (Meetings, Incentives, Conventions and Exhibitions) market and corporate travel (Pearce et al. 1998).

While some writers such as Murphy (1985) contend that seasonal variation in tourism demand has a number of positive effects for a range of stakeholders in the community, most of the writing on the topic asserts that seasonality is a problem which needs to be overcome (Baum & Lundtorp 2001; Butler 2001; Jang 2004). It is this perception which is upheld in the current research.

A significant aspect of recent research into seasonality which has direct consequences for alpine destinations is that of climate change. This theme has been the subject of much recent research, which for the most part indicates that global climate change could have harmful repercussions for alpine tourism and its associated sectors (Harrison, Winterbottom & Sheppard 1999; Elsasser & Buerki 2002; Scott 2003; Wall Undated). The most obvious change to this alpine environment in the face of global climate change is the fluctuation in snowfall and density, upon which the viability of snow-oriented tourism is based (Elsasser & Buerki 2002). Scott’s (2003) analysis, however, looks more broadly at the implications of climate change on nature-based tourism and the negative effects on animal and plant life in such environments, the ‘attractiveness’ of which generates significant tourism revenue in mountain destinations.

Specifically looking at alpine tourism and the implications of climate change during peak winter months, Harrison et al. (1999) address the issue of changes in the length of traditional snow season, which in the face of global climate change could be significantly altered, thus prompting a paradigm shift in the nature of tourists attracted to alpine regions. If the viability of the tourism industry of alpine destinations is to continue, significant change is required in order to cope with the demands of a divergent tourist markets (e.g. hikers and other summertime tourists).

As such, it is contended (Harrison et al. 1999; Elsasser & Buerki 2002) that in the face of impending climate change, the ski tourism industry, which will be one of the more profoundly affected, must endeavour to devise strategies to avert the effects of this phenomenon. Moreover, and in the longer term, the tourism industry must undergo structural changes to cope with changes to the conditions upon which they conventionally rely.

Clearly, the extant body of literature which deals with variations in tourism flow as a direct result of seasonality raises a number of issues. As this literature review has demonstrated, seasonality remains a contentious issue, not least from a marketing and policy perspective (Baum & Lundtorp 2001), as well as being vastly underdeveloped from an empirical standpoint (Butler 2001; Koenig & Bischoff 2004). While the causes of seasonality lie outside of the control of those endeavouring to reduce its effects, the case of seasonality in ski resorts and alpine destinations presents a number of challenges which need to be met in order to successfully balance the volume of tourism demand throughout the year. While an exhaustive review of the considerable body of literature on this topic is not feasible, this section of the paper has highlighted the major ideas and themes which exist, and has defined the framework within which this research is set.
Methodology

A survey instrument was designed to gauge the opinions of a sample of stakeholders at Mt Buller regarding the potential for the resort as a year-round destination (see Appendix A). It is acknowledged that not all stakeholder groups have been included. Mountain employees and owners of commercial operations in feeder towns (e.g. Mansfield, Victoria) are two other important stakeholder groups whose opinions would add value to the current discussion. The Mt Buller Resort Management Board supplied a database of all the private apartment owners, commercial accommodation and retail providers and club members. Information about the survey, including a copy of the proposed questions, was mailed or emailed to potential respondents who subsequently were followed up by telephone or responded to the questionnaire via email.

The interviews consisted of a semi-structured questionnaire covering a number of aspects regarding the concept of extending the winter season to include a summer product. Those interviewed included a sample of a range of identified stakeholder ‘class’– retail operators, commercial accommodation providers, the ski-lift company, club members and private apartment owners (see Table 1).

<table>
<thead>
<tr>
<th>Stakeholder Type</th>
<th>Total number</th>
<th>Total sample</th>
<th>No. of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private apartments</td>
<td>340*</td>
<td>97*</td>
<td>40</td>
</tr>
<tr>
<td>Club member lodges</td>
<td>93*</td>
<td>86</td>
<td>38</td>
</tr>
<tr>
<td>Commercial accommodation</td>
<td>10</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>Mt Buller Real estate agencies</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Services (Bus lines, Radio Station, Ambulance service, Doctor’s surgery)</td>
<td>4</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Stand-alone restaurant</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Booking service</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

* 31 head leases contacted producing an additional 66 individual owners’ details. 97 potential owners contacted in total; approximately

There are difficulties in dividing stakeholders into separate groups and in representing percentages of each group interviewed. There is much overlap in the ownership between stakeholder groups. For example the Chalet Hotel (at the time of interview) was owned and managed by Buller Ski Lifts, providing commercial accommodation, restaurants, ski hire and clothing stores. The General Manager of the Chalet Hotel was interviewed, as was the CEO for Buller Ski Lifts. Between the two respondents there was responsibility for a range of provision apart from accommodation (e.g. two restaurants, two bars, one retail outlet, one ski hire located in the hotel).

While private apartments are obviously owned privately, some owners choose to include their apartment in letting pools and make them available to the general public, while others do not. Club lodges, while built for the purposes of their members, and in some cases only available to members and friends of members, are also, to varying degrees providing accommodation and meals at a range of rates to the general public. Therefore some club member lodges qualify as partly member use/partly commercial use.

Commercial accommodation represents full service hotel-type provision (equivalent 2 star to 4 ½ star rated) and lodge style commercial accommodation. In some cases these hotels and lodges have been transformed from traditional accommodation into self contained apartments which have subsequently been sold separately and returned to the hotel’s letting pool.

Many of the restaurants are either part of a commercial accommodation outlet (already included as a respondent) or are owned by Buller Ski Lifts. It was not considered appropriate to interview the managers of each individual outlet when they were owned by the one company (Buller Ski Lifts), whose CEO was interviewed.

There are three stand-alone restaurants that are not included within a commercial accommodation complex, or part of Buller Ski Lifts provision. While there are seventeen restaurants in the resort, six of these are owned and operated by Buller Ski Lifts.

Retail operators, while not represented in the above table, are part of most commercial accommodation complexes. Of approximately eleven retail operations, six are owned by Buller Ski Lifts. There are three independent retail operators.

Eighty-seven interviews were conducted. These have mostly consisted of telephone interviews of ten to twenty minutes, although a number of respondents preferred to email their remarks and a small number of respondents preferred face-to-face interviews, each of which lasted approximately 45 minutes.
Nvivo 2, a qualitative software program, was employed to help sort and analyse the many responses and categorise them into themes.

**Results**

The qualitative nature of this research allowed us the opportunity to explore particular issues in greater depth. Many respondents were happy to elaborate on their reasons for holding a particular view. While it is difficult to quantify all the responses in a meaningful way, the following discussion does indicate the major issues of interest to stakeholders and where possible evidence of the predominance of respondents’ comments contributing to that view have been noted. The results have been compiled to represent consistent themes identified from the data. The thoughts and opinions of the respondents have been categorised under the following issues: overall potential; challenges; permanent community; marketing; infrastructure and services; appropriate recreational facilities. Anonymity of respondents has been maintained, with included comments sourced to the appropriate sector.

**Overall Potential for Year-round Development**

The majority of respondents agreed that there was year-round potential for the resort. Most private apartment respondents were positive about the potential for development outside winter, although several of these qualified their perspective with a range of conditions.

**Private apartment owners’ responses**

Most of the private apartment owners at Mt Buller felt that accessibility to Melbourne was a key advantage. However, apart from being the most accessible mountain resort to Melbourne, its potential could be maximised if made more user-friendly as far as parking and transport to lodges is concerned. They felt this could increase activity greatly.

Some of the owners felt that there were more opportunities to explore in summer; however, there must be more reason to visit the resort. For example, more amenities are needed, such as an outdoor heating swimming pool and incentives to encourage mountain biking and horse riding.

One of the private apartment owners provided feedback from a marketing perspective.

’It [Mt Buller] already has a well known brand as a ski resort but lacks brand profile and recognition compared with some of the other resorts.’

Private apartment owners were also asked whether usage outside winter affected their decision to purchase. Not surprisingly, for most of the respondents the opportunity for summer usage had no influence on their decision; for a few it was considered ‘an added bonus’.

**Club member lodge responses**

Most of the club members were positive about year-round development, with some of that number also including qualifying remarks about perceived potential.

Some felt that it was indeed a challenge to stay profitable due to constraints imposed by existing governance arrangements, which include increases in the costs of insurance, bed taxes and leases, to name a few. Moreover, there is only a short season to recoup all these expenses. Should Mt Buller become a summer resort, it would make these lodges more viable and less marginal. It was clear that the attraction was the alpine environment.

Once again, there were concerns regarding the lack of initiatives to promote the resort.

’To date there haven’t been effective campaigns to significantly drive people to the resort. The resort doesn’t offer enough and therefore will not have real potential outside winter.’

Suggestions for developing Mt Buller’s year round potential included product diversification. Survey respondents felt that there must be diversification in the products and services offered but also effective integration of all the facilities and resources so that they work together. The general consensus from club members was largely positive, as they felt that Mt Buller should and could work very well as a centre for summer ‘rest and relaxation’ and a base for further exploration of the surrounding area. However, issues such as product diversification and the marketing of the resort will need to be addressed to explore its fullest potential as a viable year round tourist attraction.

**Commercial operators’ responses**

Respondents readily qualified their positive remarks with reasons why the resort was not currently ‘successful’ as a year round resort.

Most owners/managers of commercial establishments responded positively to the future potential, all with some qualifying remarks about the degree of potential that existed.

Survey respondents from the commercial accommodation, restaurant and ski hire industries felt that there
was untapped potential. However, they were not too confident of the future viability of the resort, as business operators in the resort tend to be narrow-minded and myopic in their approach to business development.

As expressed by the private apartment owners, commercial operators also felt that there was not enough business in summer due to the lack of activities, amenities and incentives to entice visitors. The products offered didn’t adequately meet the needs of tourists. Many felt that a more targeted approach should be adopted; focus should be on the resort’s uniqueness - the natural characteristics that make this destination different from others. Money should be spent on these defining characteristics, which would give Mt Buller a competitive advantage.

Commercial operators at the member lodges highlighted the fact that there was a lot of potential for summer, but the resort needed more effective marketing strategies and approaches which would sell the unique characteristics to the target markets concerned.

Challenges

Resort structure
The most predominant issue relates to the resort structure generally, and more particularly to the leasing arrangements and range of costs and fees imposed on stakeholders. Approximately half of the respondents reported that resort structure, restrictions on private sector development, and rates and charges were key hindrances to successful development of the resort over the year.

The suggestion was made by a number of respondents that the resort should be governed by a local council elected by the people, thus ensuring greater accountability.

A number of respondents lamented the fact that the land was not freehold land, with leasehold title posing a number of problems e.g. developers’ ability to borrow on leased land. The lack of guarantee of lease renewal was also considered a deterrent.

There is a need to see the Resort Management Board as more than a ‘rubber stamp of government policy’ (commercial accommodation provider); there is a feeling that the Resort Management Board is not accountable to the stakeholders and does not actually represent those who have a direct financial stake in the mountain.

Some of the more negative comments directed particularly at the Resort Management Board included infrastructure costs that were considered prohibitive, e.g. gas provision had become increasingly costly, as well as site rentals and bed taxes. Comments were addressed towards a review of the current rate structure, which is vital to the development of the resort. A number of respondents thought the volume of Resort Management Board staff servicing the needs of the village was excessive. The planning process was considered cumbersome and building costs were considered higher than in many other areas of the state. There was concern that these constraints will lead to reluctance on the part of apartment owners to further invest in the mountain resort.

A sample of comments included:

‘Time taken to obtain permits and associated time required for developers to receive settlement monies from purchasers is a real problem.’ (Developer and private apartment owner)

‘For the private sector to commit large sums necessary for further development, government would be required to guarantee infrastructure development support.’ (Private apartment owner)

Charges and fees
There was a perception that charges were escalating generally, that rates were constantly increasing and being inappropriately spent (e.g. beautification of the village square), and that the bed tax was prohibitive. For example, site rentals were quoted to be three times the rate of a Portsea holiday house. A club committee member summarises the challenges in the following comment:

‘It is still very tight to stay profitable with the increases in insurance, bed tax, lease costs, etc and such a short season to recoup all these expenses...Our lodge would be more viable and less marginal if Mt Buller could become a summer resort.’ (Club committee member)

To address the problem of limited services available outside winter, respondents felt that incentives needed to be provided to encourage businesses to stay open during summer. Some suggestions were: bed tax relief in winter for those prepared to open all year; penalties for those who do not open; financial support from Resort Management Board to open; and preference given by Central Reservations to those prepared to open year-round.

Permanent community
The majority of respondents agreed that the creation of a permanent community could only add to the overall appeal of the mountain. It would help to initiate the provision of much needed services such as medical, recreational facilities, childcare, banking and supermarket - basic facilities normally present in any small community operating on a full-time basis. Many respondents suggested that a permanent community would ‘give the place a heart’.

There were others who were sceptical about the resort’s ability to attract a permanent community. Many
attributed the escalating rates as a major deterrent, along with the ever-increasing cost of living and real estate in the region. Without adequate government support for the infrastructure required, many felt that there was little incentive for people to move to the resort region and make it their home.

Suggestions to attract new members to the community included rate reliefs or a reduction for those who commit to living there year-round, as well as reductions in the costs of parking permits. A hotel manager interviewed felt that the problem lay with ineffective management.

‘RMB [Resort Management Board] do not provide incentives to be part of this community.’

Marketing
A number of respondents felt that promotion of the mountain activities outside winter was inadequate, e.g. no knowledge of the annual Irish CRAIC Festival or the Easter Art Prize. The unique attractions were not marketed to a wide enough audience. There was the suggestion made by a few that marketing should concentrate on the whole region, using Mt Buller as a base for activities in the surrounding areas, e.g. base 4WD tours, fishing tours, winery tours, Craig’s Hut tours at Mt Buller, more extensive hiking trails and music events.

In terms of marketing to a niche market, some felt that there was room for the development of markets for conference and team-building activities, thereby targeting the corporate sector. As a promotional strategy, it was suggested that short stays Mt Buller be marketed as part of a broader North East Victoria tourism package. A hotel manager felt that the youth of today should be looked at as a promising and lucrative market to tap into. Hence, their needs should be considered when developing the mountain as a year round resort.

Infrastructure and Services
Respondents were asked what additional infrastructure and services they would like to see at Mt Buller. When asked this question participants inevitably mentioned the current deficiencies. Many respondents included a supermarket at the top of their list of required services. The common theme in responses included comments about the lack of basic services and the lack of shopping facilities of any sort. Some respondents mentioned the need for a range of restaurant or dining options (from coffee shop to a la carte restaurant) as a priority. One suggestion was to develop the Post Office to offer more services, i.e. greater retail base.

Recreational Facilities and Activities Required In Summer
Suggested recreational facilities and activities can be grouped into general facilities, walks, tours, events and short course and health/educational courses.

General facilities
Some respondents thought that a swimming pool should be available to the general public. A number suggested that a golf course was an appropriate recreational facility. Other suggestions included a skate park, minigolf course, horse riding, summer luge, extra tennis courts and structured inexpensive activities (particularly for children). In fact, quite a few respondents mentioned the need for activities specifically to cater to the needs of children. A playground was a favoured option.

Competition such as mountain biking, fishing, cross-country marathons, dancing and chess were also included in this general category.

Other initiatives
A number of suggestions related to the promotion of existing features of the location. For example, there was a perceived need for more well-designated walking trails, particularly for contoured tracks close to the village. These could include ranger assisted or tour guided walks at set times, and the provision of BBQ facilities at points along certain tracks to increase the attraction of these tracks.

‘Provide lots of guided walking tracks. That is where the potential is.’ (Private apartment owner)

4WD tours and well signposted routes between Mt Buller and Mt Stirling were also considered a marketable option for summer tourists. Greater utilisation and promotion of the existing ‘Snowflake’ dam (used to supply water for snowmaking) for fishing was another suggestion. Promotion of trout fishing in the region could include Mt Buller as a base.

Short courses, education and health
Grouped under this general heading were many suggestions relating to a range of educational offerings, particularly in fitness and health.

Summer fitness camps, high altitude and fitness training were among these suggestions. Health retreat concepts were also popular, with the concept of a mountain getaway including a range of activities and utilising existing facilities; the Chalet Hotel pool, La Trobe University gymnasium, walks, masseurs, yoga and Tai Chi
were among these suggestions. A ‘lose weight for summer’ concept was suggested. Photography courses or camps were other possibilities.

**Emphasis uniqueness**

A number of respondents identified the need to emphasise the uniqueness of the setting and to develop activities that explore Mt Buller’s beauty and uniqueness rather than creating artificial attractions that are readily available in Melbourne. The promotion of the alpine environment would be the key selling point, and should be marketed as a competitive advantage over other resorts. Some were happy with existing facilities and amenities because their main interest was rest, relaxation and walking.

‘Focus should be on uniqueness, the natural characteristics that make this destination different from others. Provide interesting tracks, e.g. north face of Mt Buller has an ice waterfall that visitors don’t get to see. Offer a summer kids program and information about native flora and fauna. Spend money on the unique.’ (Club member)

**Events**

For those who mentioned events as potential draw cards, or at least incentives to visit, the favoured times for such events were Christmas/New Year and Easter. Some respondents said they would visit for a music festival. Suggestions for other types of festivals included a film festival or an annual jazz convention. A gallery featuring the works of local artists and travelling exhibitions, with a focus on regional interests (e.g. skiing, cattlemen of the high country), was a further suggestion.

**Image**

A number of respondents felt that the future of the region as a summer destination is limited because of the perceived lack of attractiveness of the mountains in summer. The variable weather conditions (and associated problem of flies in summer) and the busy building programs undertaken throughout summer months spoiling the serenity of the location were the predominant concerns.

**Attitudes**

Some commercial operators and lodge owners view the option of remaining open throughout summer as unviable in the foreseeable future. Reasons given included the lack of a stable population, which would make it highly unprofitable. Comparisons were also made with competing resorts, with regards to contractual requirements ensuring that businesses are open throughout the summer months.

‘Other resorts such as Thredbo have an obligation in their leases to remain open throughout the year, but there is no such clause in the Mt Buller leases and it would be slow if not impossible to introduce.’

(Accommodation booking service provider)

Perhaps the attitudes in general were best summed up by a private apartment owner. His argument was that business development usually occurs as a result of demand, and as it stands, there is currently not even enough demand for the supermarket or a milk bar/take away food business to stay open. Mt Buller does not enjoy a lot of passing traffic or attract a great deal of off-season visitors that require accommodation. Had there been such opportunities commercial enterprises, someone would have seized on them by now.

**Conclusions and Summary**

An interesting observation made while interviewing respondents was the overwhelmingly positive response, particularly from club members and private apartment owners in being given ‘a say’. Many stated that this was the first time they had been given such an opportunity, and they welcomed it and hoped that their collective comments would ‘make a difference’.

The above discussion is the result of identifying key issues and concerns held by a range of stakeholders. It has been noted elsewhere that although the stakeholder groups included in the survey do not include all possible stakeholder groups it is representative of a comprehensive range of views. Furthermore, while it would be possible to further analyse the data according to a range of criteria such as the position held by the respondent (e.g. whether or not the respondent is a committee member of a lodge or an ordinary member of a lodge) or length of association with the mountain no attempt was made to group issues according to any measure of such involvement or otherwise. The responses were taken at face value. This initial survey has sought only to identify the major concerns for possible action and/or further exploration.

The Resort Management Board, while not always specifically named, features strongly in recurring comments related to costs and charges and associated concerns for the potential development of the resort. The perception (or reality) that Mt Buller currently offers little for the visitor outside winter is possibly not a surprising result of this survey. However a significant finding is that, despite the many deterrents to year-round
development of the resort, the majority of respondents were very positive about the untapped potential that this unique environment offers. Given appropriate recreation facilities and supporting infrastructure and services many saw this mountain as a very attractive summer option.

While this research focused on Mt Buller, many of the issues can be generalised to other mountain resorts in Victoria that operate under the same system of governance. The government mentality of maintaining stability needs to be combined successfully with a more entrepreneurial approach in taking account of future forecasts and exploiting opportunities when they arise. However, the consultation of stakeholders in such a manner seems to be a fairly rare occurrence and can be recommended for other resorts to undertake as part of a systemised stakeholder management plan.

In summary, future action could include:

- Addressing the negative perception of stakeholders that costs, charges, and leasing arrangements are in some way unfair, prohibitive or inflated in comparison with other areas of Victoria. Hold a public debate on the issue of rent relief or other initiatives that might encourage potential providers (retail, food and beverage provision etc) sufficient incentive to open for business outside winter.
- Creating a task force comprised of interested stakeholders to methodically address valid issues and to work as a united group with government bodies to comprehensively address year-round development goals.
- Conducting further research to contextualise and analyse the identified issues.
Chapter 2

LESSONS FROM NORTH AMERICAN MOUNTAIN RESORTS

Introduction

In understanding the challenges for Australian mountain resorts attempting to develop year-round appeal, it seemed appropriate that we turn to resorts that have transformed winter resorts into year-round destinations. Many North American mountain resorts have not only attracted large summer markets, but have established, through a number of strategies, permanent communities in these regions. A study of five North American ski resorts was undertaken in 2003. The resorts are: Smugglers Notch, Vermont; Vail and Beaver Creek, Colorado; Aspen, Colorado; Whistler, Canada.

The objectives of this chapter are:
- To identify, from international mountain resorts, common strategies used to develop year-round tourism
- To identify the challenges and opportunities in developing sustainable year-round resort operations

Methodology

The study involved interviewing senior management personnel (see Appendix B) about the success of these resorts, which are now not only popular ski destinations, but have also succeeded in attracting year-round visitation. The dynamics of this shift from single season focus to year-round development was central to our enquiries.

In each case we investigated to varying degrees a range of topics:
- A brief history of the development of each resort (including the influence and impact of individuals in shaping the resort)
- The structure of the resort
- The impact the resort has had on the local community
- Current markets and market research
- Key success factors

We also identified the range of activities offered at each resort outside winter (see Appendix C). This task was undertaken at the request of the Resort Management Board at Mt Buller, achieving the purpose of providing examples of the range of activities that could underpin the successful operation of resorts throughout the summer months. Many brochures and promotional materials were also collected to inform the Board of a variety of advertising and promotional initiatives employed at each resort.

Results

Smugglers Notch, Vermont

Smugglers Notch is located in Jeffersonville, Vermont, which sits in the north-eastern corner of the United States. Vermont is approximately 162 km south of Montreal, Canada. At Smugglers Notch, we interviewed the Senior Business Advisor, Lisa Howe, and the Public Relations Manager, Barbara Thomke.

A brief history

Smugglers Notch began life as a simple ski village in 1956 with a single rope tow. Although it was established by a group of locals, Tom Watson Jr, chairman of IBM, is considered the resort’s first visionary. He thought this area could be the ‘Vail of the east’. The resort’s facilities were owned by the resort operators and the land was leased from the state government for lifting operations.

The Montreal Olympics of 1976 provided the impetus for creation of a summer resort. Camps were devised to occupy children while parents attended the Olympics. The concept was very successful and the idea of a family destination resort-style offering was born. Full programs are now offered to families, children’s groups and adults. The core business is the holiday camp concept.

Resort structure

The resort has always been privately owned and is currently owned by Bill Stritzler. The owner is essentially a developer and property manager, continually adding to the inventory of the resort and selling off apartments. A
range of investment options is available including timeshare, full ownership and fractional (owning 1-2 months). The properties are managed by the resort.

**Impact on local community**
The resort management was very keen to emphasise the strong community links and it was clear that the local community was recognised as a key stakeholder in their operations.

'We have a very good relationship with the state of Vermont and the local community.' (Barbara Thomke)

Free skiing one day each year is provided for the local community. The resort hosts Fourth of July fireworks for the local community each year. Grade five students from surrounding communities are offered a free season pass for the year. The resort owner believes that this initiative introduces them to skiing and provides future dedicated skiers. They also offer ‘Mum and me’ and ‘Dad and me’ ski days for locals.

**Markets and market research**
Summer occupancy is higher than winter although, as with each of the other resorts visited, winter provides the larger source of revenue. For Smugglers Notch though, 45% of annual revenue is from non-winter visitors where for other resorts the mix is approximately 70% winter, 30% summer.

The summer market is a drive market (within one day’s drive to New York City, Boston and the East Coast). Winter is a mixture of fly/drive market. Florida is a significant market as too are Toronto and Montreal.

A long survey is mailed out to guests annually. A free vacation is offered as an incentive to complete the questionnaire. On average a 20% response rate is received. The findings of the survey suggest that some 63% of guests are or intend to be return guests.

**Key strategies**
Thomke and Howe believe the resort’s competitive advantage lies in the continual focus on their core product – family vacations. They have built on Thomas Watson’s original concept and now have a national reputation for good value, safe family holidays evidenced by the numerous industry awards the resort has received.

'The reputation over time has helped us. We have tried very hard to be the best resort for family entertainment anywhere.' (Barbara Thomke)

Other factors contributing to their approach to year-round development include:
- Word of mouth from satisfied customers.
- A private ownership structure.
- Adaptable and flexible management that can respond quickly to changing conditions including unpredictable weather conditions.

**Vail Resort**
Vail Resort is located in Vail, Colorado, approximately 160 km west of Denver. The interviewees for Vail were the Mayor, Ludwig Kurtz, CEO of the Vail Chamber of Commerce and Tourism Bureau, Frank Johnson, and Vice President Marketing Vail & Beaver Creek, Chris Jarnot.

**A brief history**
Vail resort began in 1962 as a purpose built ski resort. It was the inspiration of two visionaries, Pete Seibert and Earl Eaton. Seibert saw the potential of the area while he served with the Army’s 10th Mountain Division stationed in Aspen during World War II. Like many destinations it has experienced good and bad times. During the 1960s and 70s it developed at an accelerated pace as the demand for ski and winter sports boomed. While Seibert and Eaton were ahead of their time in vision, they lacked the business and planning skills required to handle such a fast pace of development. A national highway was constructed through the middle of the resort, detracting from the European mountain village character originally envisaged by Seibert and Eaton.

George Gillet purchased Vail Associates in 1985 and he too has been credited with having a significant impact on the shaping of the resort. CEO, Chamber of Commerce, Frank Johnson, a long time resident of Vail, noticed the difference in the character of the resort when it was still a private company under the leadership of George Gillet. Now the ski operations are owned by Vail Resorts, a public company that is expanding its portfolio, now owning five resorts (four of which are ski resorts).

'The relationship with the community was very different under the ownership of George Gillet because there was an identity, passion for what it was about, a piece of the community. Passion about the sport. Now although the leadership lives in the community, it is a public company. The relationship has changed dramatically' (Frank Johnson).
**Resort structure**

Vail Resorts owns the ski-lift operations, a number of accommodation and food and beverage outlets, and some retail establishments (almost all retail in the adjacent Lionshead village area).

The Town of Vail has a municipal structure. The Chamber of Commerce consists of 850 businesses across Vail, Avon, Beaver Creek and Edwards.

**Impact on local community**

Seventy-five percent of homes in Vail are second homes. According to the Mayor, there is a pronounced ‘locals vs. second home owners’ mentality, which causes increased community tension on certain issues. There are approximately 5000 permanent residents in the Vail area (concentrated along seven miles of the valley). Recent devastating impacts on visitation (e.g. 9/11 and Iraq war, droughts, fires) have brought the community together. Community forums are often well attended, particularly those concerning affordable housing issues for staff.

Environmental policies are partly dictated by government and partly by the operator. Mountain biking was a popular pursuit in the past, but the activity has been restricted recently partly because of the opposition from the wealthy, older second home owners who make up a large percentage of the population outside winter and partly due to the potential environmental damage caused by ‘renegade trails’ used by bikers.

Local people have to move ‘down valley’ because they can no longer afford to live in Vail. There is always a shortage of seasonal employee housing. ‘We are aggressively addressing that issue’ (Mayor Kurtz). The town has bought 180 units and is currently building another 142 units. It is a controversial issue. The housing is deed restricted and operates on a lottery basis because so many employees meet the criteria. Accommodation operators provide some housing for staff but not enough to meet current needs. In 2000, the Town of Vail instituted a requirement of commercial establishments that are expanding to provide housing for 33% of extra staff required as a result of the redevelopment.

**Markets and market research**

Vail Resorts has a very large marketing budget (approximately $20 million per year is spent on marketing their five resorts).

In Vail, Vail Resorts market winter and the Town of Vail markets summer and shoulder seasons. Summer has been actively marketed over the last twenty years. The impetus for concentrating on summer came from the community and the Chamber of Commerce although cooperative marketing is undertaken with Vail Resorts.

The summer marketing budget is $1.8m for Vail and Beaver Creek. Beaver Creek spend a further $800,000 on marketing their own resort. Individual hotels also market their own offerings separately.

The town of Vail imposes a tax (1.4%) on lodging that goes directly to promotional efforts. In the last four to five years a considerable amount has been spent on researching their market (outsourced to a Canadian company that conducts national tourism based research), and researching those who do not visit (similar to the perception study undertaken by Thomas and Russell in Hall & Boyd, 2005). The results of the focus group research suggested that people perceived the resort as being expensive, and lacking in activities (because it is a ski area) during the non-winter period (results are similar to our own findings).

As with many ski resorts, the effort to attract a summer market has been relatively recent.

‘Summer was an afterthought. ’ (Mayor Kurtz)

‘The ski company spent a lot on promotion – but nothing on non-ski marketing. ’ (Frank Johnson)

Even so, compared to Australia the summer market in North America has long been an important focus. Vail has included summer marketing for the last twenty years.

People stay longer in summer than in winter and it is usually part of a longer vacation. Approximately 30% of the market comes from Denver (a three to four hour drive from Vail). ‘Fall’ is popular due to the changing colours of the leaves.

At the time of the interview, the town had just granted approval for the building of a US$50m conference centre in order to attract some patronage from the Meeting, Incentives, Conventions & Exhibitions (MICE) market. Repayments on the loan for this building are to come from 1.5% surcharges on lodging (to produce $4m pa). While there is some dissention about the project, the lodging community is generally in favour of the proposition. The hotels that currently have facilities for conferencing are doing very well. Even so they are investing in some research to conduct a feasibility study of the conference facility and a final decision had not been made at the time of the interview.

The Chamber assists in the organisation and marketing of meetings and conferences, providing approximately $300,000 annually for that purpose. The town attracts financial services firms and insurance companies and is increasingly popular as an incentive destination for sales forces of all kinds. The Mayor made it clear however that they would only target certain types of industry sectors in order to preserve the ‘tone’ of the resort. This seems somewhat contradictory to earlier claims that they want to change perceptions of exclusiveness.
While Vail has always been known as a recreation and sports destination, in the last few years, efforts have also focused on staging more cultural events.

The impressive Vilar Centre for the Arts (at Beaver Creek) rivals any major city facility. In 2003 the resort was proud to have attracted the New York Philharmonic Orchestra – the first time the company had ever played outside New York. First class theatre, opera and concerts are available year-round. The funding and push to bring these activities to Vail are predominantly from wealthy second home owners and retirees who demand a similar range and class of cultural events that they are accustomed to in the city.

The resort found through its recent research efforts, that there is a high degree of interest in visiting the Rockies. A decision was made to position Vail as the ideal headquarters for such adventure. Emphasis was placed on accessibility. There has also been a recent change in strategy from marketing individual resorts to marketing the whole valley. There was resistance to this initiative, with many Vail business owners believing that Vail money should not be spent on other areas. However businesses are now beginning to see the benefits of promoting the whole range of attractions in the area. Part of the advertising includes the by line ‘So much to do within ¾ hour drive’ (Frank Johnson).

While it was acknowledged by interviewees that Vail resort is in urgent need of refurbishment (beautification programs have subsequently begun) significant resources have been dedicated to market research.

**Key strategies**

Three successful initiatives relating to the effective year-round development are:

1. **Positioning** – Vail is positioned as the gateway to the ‘front range’ (a term used to describe the populated areas along the range of mountains in Colorado that run north to south on the eastern edge of the Rocky Mountains). As the resort offers similar ‘product’ to other neighbouring resorts (e.g. Keystone, Breckenridge) the marketing challenge included identifying a strategy that would attract visitors to begin their experience of the mountains at Vail. Providing a range of ‘adventure’ opportunities and making Vail the headquarters for such adventure is beginning to pay dividends.

2. **Market research** – dedicating considerable resources to researching current and potential markets, understanding the needs of those markets and then providing suitable experiences to match those needs. One example is the research undertaken to investigate an appropriate match with potential conference/convention clients and actively seeking out appropriate MICE markets.

3. **Real estate acquisition and development** – real estate has been a significant economic driver which provides a strong buffer to unpredictable tourism cycles. Approximately 75% of home ownership in the Vail region is owned by ‘second home’ owners i.e. those owners who use accommodation at the resort for part of the year as a vacation home. The sale of real estate generates significant funds for use in further developing infrastructure, services and facilities.

**Beaver Creek, Colorado**

In the case study of Beaver Creek (located 16 km west of Vail) we interviewed Vice President Marketing Vail & Beaver Creek, Chris Jarnot, Senior Vice President and CEO for Beaver Creek, John Garnsey, and Marketing Coordinator, Beaver Creek, Lindsay Paterson.

**A brief history**

Pete Seibert, who is credited with establishing Vail ski resort, had always wanted to purchase land at Beaver Creek. He finally negotiated an option for land in 1971. The company he founded, Vail Associates, began development of the resort in 1972. Beaver Creek Resort Company was established in 1979. Ten years and $40 million dollars after initial development, Beaver Creek resort opened. Vail Associates subsequently merged with Ralston Resorts ski operations - Keystone and Breckenridge - creating Vail Resorts, the largest skiing company in the world. Vail Resorts is the current owner of Beaver Creek resort.

**Resort structure**

Unlike Vail, Beaver Creek is a private town and not a municipality.

_The resort is run by a private company which does away with a lot of headaches._ (John Garnsey)

The Beaver Creek Resort Company has a board of nine directors and is made up of Vail Resorts representation, residential and commercial property owners. The Vail Resorts Company operates as a monopoly and has a unique relationship with the Beaver Creek Resort Company. Sales taxes are collected to fund the services provided by Vail Resorts (include marketing, security, roads etc). Winter marketing efforts are funded largely by Vail Resorts.
Impact on the local community
Apart from commercial accommodation, second home owners are predominant in Beaver Creek. As found in Vail, some tensions are created between the second home owners wanting to ‘close the gates’ of their resort, and the Resort Company wanting to increase visitation. Summer events are greatly influenced by the demand from this part of the community.

Markets and market research
As with most of the resorts, there are increasing efforts and resources focused on summer tourism. ‘This year we raised $900,000 for that purpose’ (John Garnsey).

Beaver Creek utilises Internet marketing, direct marketing and very targeted marketing. Texas has historically been a good market for their product.

A strategic decision was taken three to four years ago to ‘put all our eggs in one basket and direct marketing resources towards lifestyle publications’ (Chris Jarnot). However at the time of interview, senior management was not satisfied that this approach was effectively reaching intended markets.

The winter product is obvious, the travel segment is mature and ‘has a life of its own’ (Chris Jarnot). The summer product is not so easily defined. Success outside winter requires the staging of quality events and a range of attractions to sustain healthy visitation numbers.

Key strategies
- Attracting high profile hotel groups, e.g. the establishment of the Hyatt in Beaver Creek (opened in 2002). Ritz Carlton is seen as another success story for the resort. One of the grand hotels of the world, it is 50% owned by Vail Resorts so ‘it was a significant risk but seems to be paying off’ (Mayor Ludwig Kurtz).
- Commitment to and control of high quality design elements of the resort.
- Attracting wealthy second home owners. For example, USD$15m was raised by second home owners to build the Vilar Centre (arts and cultural facility) (John Garnsey, pers. comm). No financial commitment was made by Vail Resorts or Beaver Creek Resort Company.
- Private town structure.
- Events – quality and diversity.

Aspen, Colorado
Aspen is located in Colorado, USA, approximately 255 km south-west of Denver. We interviewed two senior management representatives from Aspen: CEO Aspen Chamber of Commerce, Ms Hana Pevny, and Senior Vice President Aspen Skiing Company, David Perry.

A brief history
Aspen was a significant silver mining town in the 1800s so its early history is associated with the establishment of facilities for such industries. Although its population has fluctuated over time, it currently has a permanent population of approximately 7,000.

There has been a well-established community there for over forty years. Many of the early residents, especially nascent skiers, were in the Army and were stationed there during the war. Seeing the potential for a ski resort they came back after the war to bring their dreams to reality. In the 1940s, Walter and Elizabeth Paepke, arriving from Chicago, founded the ‘Aspen idea’ – a holistic mind, body and spirit retreat introducing arts, music, and intellectual pursuits through the Aspen Institute. Their endeavours brought world famous speakers and musicians to the area.

Resort structure
The Aspen Skiing Company (owned by the Crown family) is a key stakeholder in the town owning the ski-lift operations, a major hotel at the base of the ski resort, a number of retail outlets, Snowmass village, and other real estate in the area including a golf club.

Impact on the local community
As with the other resorts, second home ownership is predominant with 55% of property being second homes. These visitors, especially those from the ‘rich and famous’ set, only visit once or twice a year. Some properties are put into a rental pool although many are not. The local economy is partly driven by the demands of this group for all sorts of services; however it does not drive tourism in the region.

The sense of community is quite strong, according to Hana Pevny. Although there is a mixture of second home owners, seasonal workers and permanent members of the community, Aspen is and has been a permanent
village for many years (prior to skiing) and ‘exists despite the snow and skiing’ (Hana Pevny). This is a unique situation for a ski resort.

Pat O’Donnell the CEO of Aspen Skiing Company has a strong commitment to environmental sustainability and has provided a model that other ski resorts are emulating. The company;

‘...is not the local whipping boy that we once were. We are taking the initiative and setting a very high standard for our own company. The community has trust in us as a company.’ (David Perry)

O’Donnell established, among other initiatives, an environmental advisory committee, appointed a full-time environmental director and established an independent company to distribute contributions from the ski-lift company and voluntary subscriptions from employees to any environmental issue that the community deems appropriate.

Markets and market research
The Aspen Skiing Company conducts most of the winter marketing, while the Chamber of Commerce (representing approximately 48% of businesses) markets summer.

The Chamber has a budget of approximately $400,000 for this purpose (considered insufficient to adequately market summer).

‘The Chamber doesn’t have the money to be too specific. We are looking at lifestyle, weekend warriors, work hard and play hard markets.’ (Hana Pevny)

In addition to a 1% bed tax, a further 1% levy is used to support the free bus transport throughout the village (introduced to discourage use of cars within the resort) and the remainders of the funds are spent by the Chamber to market summer. A marketing forum has been established with Snowmass, Aspen and the central reservation service in an attempt to combine efforts and share ideas.

While Aspen has traditionally appealed to a wealthy, older market, current Chamber initiatives include an increasing focus on youth. Marketing efforts are aimed at changing the perception that Aspen is an exclusive resort.

The primary market is a drive market mainly from Denver, although promotional efforts include New York City, Los Angeles, Dallas and Florida. The Chamber is also attempting to increase exposure in Australia and New Zealand for summer product (because these are also traditionally very good winter markets).

In addition the Chamber is promoting quality shopping, a good range of restaurants, plus adventure. The Paepke’s original ‘Aspen Idea’ is still very much at the forefront of Aspen’s attraction. In summer especially, events are very successful with the classical music school attracting 600 international students every summer; American Express sponsor a food and wine festival and there are also jazz and rock concerts. Yoga in the mountains, spiritual workshops and stimulating lectures are common features of the arts and cultural program.

Key strategies
• Capitalising on the climate – Aspen boasts 300 days of sunshine.
• Exploiting the unique historic village (unlike purpose built ski resort villages) and established permanent community.
• Continued support of the established arts and cultural calendar of events by the business community.
• Ongoing commitment of the Aspen Skiing Company to environmental strategies, raising funds for many worthwhile community projects.

Whistler, British Colombia (Canada)
Whistler is located in British Colombia, Canada, and sits approximately 125 km north of Vancouver. In Whistler we were fortunate to gain interviews with a range of high-level management staff. They are:

• Hugh O’Reilly, Mayor of Whistler
• Bob McPherson, Interim GM, Planning & Development Services, Resort Municipality of Whistler
• Jim Godfrey, Administrator, Resort Municipality of Whistler
• Mike Duggan, Chair, Board of Directors, Tourism British Columbia & GM Pan Pacific Hotel, Whistler
• Alan Rice, Manager Research and Intelligence, Tourism Whistler
• Chris Nicholson, PR & Communications Manager, Whistler Blackcomb
• Marla Zucht, Housing Administrator, Whistler Housing Authority

A brief history
Whistler was originally a summer resort, the second most popular summer destination after Banff and Jasper. The concept for a resort originated in the 1960s with an unsuccessful Olympic bid. The resort municipality was created in 1975. Work on the Whistler Village began in 1978 and was conducted in a number of phases. Strict covenants were established to govern the purchase and occupancy of properties in the village and to avoid the ‘second home’ predominance and consequent ‘cold beds’ or an unoccupied bed as is the case in most other ski
resorts. The municipality focus was on creation of a lively, vibrant village community. The planning stands as Whistler’s great innovation of the 1970s, and is still influencing and guiding development today, allowing the resort municipality ‘a special charter to … pretty much control everything that happens in the resort’ (Mayor O’Reilly). The entrepreneurial efforts of current senior members of the Resort Municipality of Whistler have been recognised as contributing to the success of the resort today both in winter and in summer.

Intrawest, a Canadian real estate company that has invested considerably in mountain resorts in North America and Europe purchased Blackcomb Mountain (adjacent to Whistler) in the mid 1980s and in 1997 it merged with Whistler Mountain Ski Corporation to become Whistler Blackcomb.

Resort structure
The Resort Municipality of Whistler (RMOW) is a quasi-government authority responsible for parks, trails and infrastructure and has control over all building approvals.

Whistler Blackcomb owns the ski-lift operations and a range of retail and accommodation operations within the resort. The company is a dominant retailer and also owns adventure programs, biking and tours.

‘Part of the evolution of this company is that initially we concentrated on capital expenditure e.g. lifting systems and we are now focused on service.’ (Chris Nicholson, WB)

Part of that commitment to service is active participation in the development of resort product outside winter, which is obviously not the company’s core business. Tourism Whistler (the marketing arm of RMOW) undertakes much of the summer marketing at Whistler whereas Whistler Blackcomb is responsible for marketing the winter.

There is a 2% hotel tax – a portion of which goes to Tourism Whistler for marketing purposes and the remainder is used by the municipality for tourism infrastructure.

‘The key to success is having a stable funding base.’ (Alan Rice)

The dramatic scenery surrounding Whistler and Blackcomb mountains provides a key attraction for year round tourism. There are lakes for fishing and excellent hiking available for outdoor enthusiasts and the ‘animated’ village has many attractions for all ages and families.

There is a commitment from all stakeholders for continued summer development and the growth of a permanent community.

‘There is recognition that even if it is a break-even proposition it is worth doing.’ (Chris Nicholson)

Even though it was originally a summer resort, the stakeholders understood that rejuvenation of a summer market was not going to happen quickly. The strategy was to ‘grow summer gradually – a weekend at a time’. Through the success of key events there were more and more reasons for people to visit throughout the year (Mike Duggan).

Alan Rice suggests that summer visitation ‘has primarily grown on the back of golf, mountain biking and summer sightseeing’.

Impact on the local community
‘From a community perspective, what brings people here is the skiing, what keeps people here is the summer. It is true for myself and most others who work here. There is much more to do in summer.’ (Alan Rice)

The resort is comprised of a divergent group of stakeholders who don’t always agree amongst themselves, according to the administrator of the resort. However it is a very proactive community. There was division over the Olympic bid for 2010. ‘Now that we have it everyone is happy’ (Jim Godfrey).

RMOW meets with the community over many issues. Primarily the interaction is with the business community although residential community input is welcomed. Affordability and housing are real issues.

‘We work very hard to create a resort community as opposed to a resort. Affordability is the key to this.’ (Mayor O’Reilly)

Markets and market research
Tourism Whistler has sixty staff, including personnel in finance, group sales, travel media, traditional advertising, web marketing and a research group.

‘We are targeting people with a youthful attitude. Whistler Blackcomb is concentrating on youth.’ (Alan Rice) (Currently research into Generation Y is a significant focus.)

‘We are targeting more affluent markets because we have a premium product. We are not a cheap resort.’ (Alan Rice)

Tourism Whistler invests heavily in research. They have a designated research department with its own budget of $250,000 per year allowing for one major research task per year. In 2003 Tourism Whistler undertook a major research study to identify events that matched Whistler’s destination appeal. Five to six possibilities were being examined but details were not offered due to the commercially sensitive nature of such information (possibilities included sporting, food and wine, and film events).
Demographics, psychographics, golf research, summer positioning and researching the power of the brand have been undertaken. A two phase project with a series of twelve focus groups, followed by a US wide online panel survey aimed to examine Whistler’s image and what the market wanted it to be.

**Key strategies**
- A clear vision for the future of the resort and mechanisms in place for effective communication of that vision.
- Capitalising on the unique physical assets – mountains and lakes providing for a range of activities and attractions.
- Incorporating luxury amenities into the natural landscape.
- Support and maintain access for two strong markets, drive and air.
- Remaining true to their master plan and enforcing strict development covenants on all buildings in the resort.
- Maintaining a pedestrian based village i.e. restricted parking and motor vehicle access in the village (similar to Aspen).
- Developing a large conference facility. The initiative is funded jointly by resort municipality and the provincial government.
- Maintaining the village square concept – the vibrant atmosphere and variety offered in the village attracts many visitors in all seasons.
- Enforcing a growth cap. There are established limits to the development of the resort. A key consideration in the Olympic bid was maintenance of this growth cap.
- Promoting Whistler in April – one of the busiest months of the year. The ability of the resort to capture significant events for this month when other ski resorts such as Vail and Aspen have closed. The weather is good and there is still fresh snow on the mountain.
- The involvement of Intrawest has provided a significant amount of infrastructure in the resort.

**Future Plans and Challenges**

In addition to the broad themes presented in this report, a number of challenges and future plans were extracted during the interview process with resort management representatives. Following is a selection of comments and key challenges in three of the featured destinations which merit attention. Each issue can be seen as representative of the challenges which confront contemporary alpine resorts with regard to year-round tourism.

**Vail**
Major objectives for Vail now concentrate on refurbishing what has become a fairly tired, old village. There is little land left for new developments. Planning approval for new developments favour pure hotel projects or hotel plus fractional ownership. ‘Wholly owned condominiums will not get through the approval process’ (Frank Johnson). This is an effort to minimise the number of ‘cold’ beds in the village. New hotel product is gradually appearing. Much of the accommodation is condominium style so that the approval of some 150 owners is required for redevelopment. One successful project was ten years in the making!

‘Vail resort in winter time is arguably one of the best ski areas in the world, with people happy to pay accordingly.’ (Frank Johnson)

However the real challenge for Vail in summer is to differentiate its offerings from other resorts on the ‘front range’ (within driving distance to Denver).

The resort is also attempting to attract a different demographic market – appealing currently to the seniors market.

‘Older people won’t be able to enjoy recreation in a resort at this altitude over an extended period of time. There is a need to reenergise the brand and attract a younger demographic.’ (Frank Johnson)

The resort has undertaken some Generation X and Y marketing and relied on some partners to do so also e.g. lacrosse tournaments are quite successful. They have introduced a series of competitive outdoor games in the shoulder season to attract the youth market. ‘Old people like to be where young people are but the reverse is not the case’ (Frank Johnson). Concerts that appeal to the younger markets are also offered in the quiet times e.g. end of summer and end of winter.

It is unusual for a tourist destination not to have tourism as its primary contributor to the economic health of the region. Over the last ten years, real estate development has been the number one driver, followed by tourism. This is not unique to Vail. We found that most of the mountain resorts are increasingly more reliant upon the property industry. Companies like Intrawest which have taken control of key mountain resorts are firstly real estate companies, developing, selling and managing property as their key income source. Property prices in ski resorts have escalated dramatically in recent years. Second homes or fractional share ownership are the primary
property product. As mentioned earlier, 75% of homes in Vail are second homes. This has encouraged economic activity but it also creates challenges in other ways. It means there is the potential for ‘cold’ beds (unoccupied beds) throughout the year.

**Aspen**

While the various music, ballet and arts festivals, and the very successful American Express Food & Wine festival, drive much of the visitation in non-winter periods, the CEO of Chamber of Commerce believes that Aspen will only ever be a three-season resort. There is a drive to extend the main summer season at either end. Traditionally businesses like to close mid April to early June, to take a break from the long and busy winter. Mid October is also very quiet.

A key challenge is in maintaining a vibrant village atmosphere in summer. Rents are very high and there is a high turnover in the village of retail ownership. The latest problem concerns the high occupancy by real estate offices of prime ground floor positions and the potential loss of village atmosphere.

Changing the perception that Aspen is a celebrity destination is also proving difficult, although this is understandable due to the extremely high prices of accommodation, goods and services there.

**Whistler**

The MICE market is a significant component – attracting 30-40% of sales in 2003. A $29m renovation of the convention centre is considered a critical factor for the future success of summer and shoulder seasons.

The resort is known globally as a premier winter destination and current efforts are aimed at increasing the recognition and market association as a summer resort as well. Providing better access (road, air and sea) is one of the strategies being examined.

While marketing strategies focus on improving the summer market, the emphasis, according to Mayor O’Reilly, is not necessarily on attracting more visitors, but increasing the yield. The major challenge is to increase the length of stay of summer visitors. The aim is to maintain a ‘sense of place’ throughout the summer and shoulder seasons.

**Unpredictable Events**

The impacts of the 9/11 attacks were devastating for tourism in general and the mountain resorts were not immune to these effects. However, positive responses have helped to mitigate the negative effects. Resorts that were fierce competitors found themselves working together to gain information that would be beneficial for all. Even after the worst of the impacts, this newfound co-operation has remained.

‘After 9/11 I quickly moved to get traditional competitors to move together. We also worked closely with Vail Resorts. It was a trust building exercise. We were all less concerned with our own individual competitive position and worked on common initiatives to improve visitation.’ (David Perry – Aspen Skiing Company)

**Resort Products and Activities**

While identification of the range of activities available at each resort is offered in the form of a table in Appendix C of this report, the table does not include the complete range of facilities and services available. A selection of such activities has been included to demonstrate, firstly, the nature of the most common activities undertaken and secondly, to include the less conventional approaches to product offering. Obviously each resort has capitalised on the topography of its region to offer well maintained (and often well signposted) hiking trails. All but one of the resorts offered a form of road biking trails as well as mountain biking trails, incorporating use of the ski-lifts to transport visitors to the tops of trails of varying degrees of difficulty. Beaver Creek was one resort that did not embrace the mountain biking ‘craze’ so popular at Whistler Resort (with 60,000 mountain biking visits each summer) and others. Interestingly, while environmental issues were suggested as the reason for halting the emergent mountain biking phenomenon at Beaver Creek, it was quietly acknowledged that the second home owners (a powerful lobby group) were not in favour of such sport in their resort, preferring more sedate forms of entertainment. Vail Resort had included a kayaking park in a stream in the centre of the village to provide an obvious focus for adventure sports in the area.

Cultural events figured significantly at most (nine of eleven) of the resorts examined. A number of interviewees noted that these cultural events helped to foster repeat visitation from the more mature (and wealthier) market of visitors outside winter. Notably Beaver Creek and Aspen included a comprehensive range of arts festivals, ballet, orchestral concerts, and food and wine festivals as part of their summer calendar. Eight of the eleven resorts included golf courses. Nine of the eleven made effective use of ski-lifts (gondolas) to transport visitors to mountain top restaurants or viewing platforms. Six resorts had some form of dedicated recreational centre with Whistler providing the most comprehensive of these in the form of indoor pools and play centres, indoor sports and gymnasiums all of which were offered to permanent residents at discounted rates.
A number of the above mentioned activities are found at mountain resorts in NSW and Victoria and already provide a draw card for visitors. However there is potential to develop other ‘adventure’ type pursuits such as Whistler’s recent inclusion of a ‘zipline’, similar to a flying fox across a river close to the village of Whistler. Four-wheel biking tours of the alpine regions at Whistler are another popular pursuit. Those resorts attempting to capture Generation X and Y markets are seeking to provide a range of adventure activities that appeal to these markets. A form of bungee jumping is offered at Whistler and Bromley Mountain in Vermont.

Farmers markets promoting the produce of the region are popular activities undertaken at the largest of the resorts (Whistler, Aspen and Vail). With the diversity of product offering close to each of the Australian resorts (e.g. boutique wineries, olive production etc) such markets could provide an interesting venue for regional producers.

A number of interviewees also mentioned the emerging trend towards ‘mind, body and soul’ experiences sought by niche markets. Health retreats, including massage, physiotherapy and yoga classes (currently offered on mountain tops at Aspen) were considered to be very compatible with the physical location of these resorts.

Most resorts offered a comprehensive range of children’s activities, from a highly organised calendar of events for different age groups (e.g. Smugglers Notch) to ski-lift companies offering a range of facilities (e.g. jumping castle, bungee jumping) at the base of ski-lifts.

**Conclusions and Summary**

The researchers note that direct comparisons cannot be made between North American and Australian resorts, particularly in terms of the key economic driver for North American resorts being real estate developments. Australian mountain resorts are situated within National Parks or on Crown Land, thus constraining developers’ activities to the sale of leased land rather than freehold land (with the exception of Dinner Plain in Victoria – the only freehold land above the snow line in that state). Golf resorts adjacent to ski resorts in the North American examples not only provide an important draw card for the visitor to North American ski resorts, but also fund the development of those golf courses. With the exception of Thredbo resort in NSW, and for a range of reasons, ski resorts in Australia will not in the foreseeable future provide such amenities.

The elements common to the successful year-round development of each of the North American ski resorts include the acquisition and sale of real estate to fund resort development; identifying appropriate signature events to foster increased visitation during shoulder and summer seasons; attracting internationally recognised, prestigious hotel companies to help establish the ‘credibility’ of the resort e.g. Hyatt and Ritz Carlton in Vail/Beaver Creek; provision of a high quality golf course and availability of a broad mix of activities. The challenge common to each of the resorts is to grow the summer market, particularly the youth market and to change perceptions of being expensive, inaccessible destinations.

The entrepreneurial drive and enthusiasm of the management is very evident in the case studies and that alone can be encouraged and replicated anywhere. Our overall impression is that the management is never ‘sitting still’, always taking a proactive approach to managing their resorts and striving for continual improvement and innovation in product and markets.

Most of the interviewees acknowledge the importance of a strong relationship with the community in the success of the resorts. Particularly in the case of Whistler Resort, the interviewees from the RMOW repeatedly emphasise the importance of ongoing dialogue with the permanent community about future plans for the resort. All agree that the development of a permanent community was both a key success factor and also an outcome of a successful resort.

A common response from interviewees at Whistler was that ‘the winter brought me to the resort, the summer kept me here’. The sense of community and the range of amenities and activities provided for those who choose to live and work permanently in the area seem to be key in sustainable year-round development.

An investment in market research was a repeated theme in our discussions. Research is a permanent element in the resorts’ operations and not an ad-hoc, emergency remedy. The increasing rate of change and the impacts of unpredictable events has made resort managers realise that high levels of knowledge and understanding about the factors that impact their success is one of the best ways to reduce uncertainty and increase confidence in their actions.

In summary, while the scale of the North American resorts and the size of the markets are not comparable to the Australian context, their overall strategic direction can provide relevant learning. The lessons for Australian mountain resorts include the importance of establishing a strategic direction for appropriate resort development inclusive of the opinions of all stakeholder groups. While the Alpine Resorts 2020 Strategy (2005) provides a blueprint for the longer term in Victoria, mid-term strategic planning at each resort location is essential. It is important to not only identify the unique attractiveness of each resort and market that attractiveness appropriately, but to also provide a range of complementary facilities and services. Investing in appropriate market research (of current and potential markets) is instrumental to that process. There is a general perception that rates and charges levied by the Resort Management Board as ‘landlord’ of the resort discourages investors...
from establishing year-round operations. The opportunity for rent relief or similar concessions needs to be explored. Attempts to establish substantial permanent communities in mountain resorts in Australia will largely be a result, rather than a cause, of successful attempts to attract a range of visitors to the mountains throughout the year. The Resort Management Boards, as ‘landlords’ need to foster a very consultative process inclusive of the whole resort community if a shared vision for the resort is to be achieved.
APPENDIX A: QUESTIONNAIRE FOR STAKEHOLDERS AT MT. BULLER

Building sustainable mountain communities

1. What potential do you see for the Mt Buller resort in the future (in terms of viability summer/winter or year round)? (Is there anything hindering development now?)

2. What facilities/amenities/services would you like to see offered year round at Mt Buller?

3. What do you see as the benefits (if any) of a year round community at Mt Buller and what would make the Mt Buller resort more attractive as a permanent place of residence?

4. What type of developments do you believe would be suitable or viable outside the winter season? (These do not necessarily need to include tourist attractions).

5. If you are a seasonal resident/visitor do you visit the surrounding areas during your stay at Mt Buller? E.g. Mt Stirling, Mansfield, Jamieson, Merrijig, Delatite Winery, King Valley etc

6. Are you now or have you ever been involved with any of the following activities in the past outside the winter season?
   a. Planning groups e.g. Chamber of Commerce, Marketing Board, summer marketing group?
   b. Events, festivals e.g. CRAIC, Easter Art Prize
   c. Other

7. Are you a permanent resident? Yes/No

7a. If Yes, how many years?

8. If you are not a permanent resident -
   a. Are you a Seasonal Resident? How many years?
   b. Are you a seasonal visitor? How often each season?
      Winter _____ Summer _____
   c. Are you an employee or an employer? What organisation?
   d. Other (e.g. full time parent, volunteer guest services, ski patrol)

9. Do you have any other comments?

10. What would entice you to visit Mt Buller outside winter?

* The following questions replaced Inns 7 – 10 for Commercial operators

7. How long have you been a seasonal resident/employer at Mt Buller?

8. What role does your establishment currently play outside the winter season?

9. Do you see a role for your establishment outside winter in the future? Why/Why not

10. Do you have any other comments?
APPENDIX B: NORTH AMERICAN CASE STUDY INTERVIEW QUESTIONS

1. What were the key drivers of change in your resort from being a seasonal destination to one of year round visitation?

2. What role has the community played in the change (e.g. community consultations, representation on planning, marketing boards, etc)?

2a. How would you describe the ‘sense of community’ in this region? Can you comment on the cohesiveness of the community generally?

2b. What is your perception of stakeholder views of summer promotion generally? Are most stakeholders (community representatives, commercial operators) supportive of current initiatives?

2c. How has the development of non-winter activities affected the permanent community?

3. What are the key elements in the success of your resort today?

3a. If you could isolate one key element of success what would it be?

3b. If there was some strategy you now regret and would have done differently what would that be?

4. What are the challenges that have arisen due to growth in non-winter activities?

5. What are the key economic drivers of the prosperity of your resort today (i.e. solely tourism related or other)? Has there been a change in focus over time?

6. What are the major objectives for the immediate future of your resort? What are some of the main challenges in fulfilling these objectives (e.g. funding issues, community support, infrastructure development, management structure)?

7. Are there any key people who have helped shape the resort as it is today?

8. Who are your primary markets for summer activities? Are there plans to extend your appeal to other market segments? How do you target these markets?

9. Where do you see this destination going in terms of visitation outside the winter season?

10. Have there been any unpredictable events that have had an impact on the development of the resort?
APPENDIX C: NORTH AMERICAN MOUNTAIN RESORTS
PRODUCTS AND ACTIVITIES

| Resort                  | Walking | Guided walks | Guided tours | Road biking | Alpine Side | Water-Side | 4-Wheel Bikes | Helicopter Tours | Whitewater Rafting | Bungee Jumping | Paragliding | Fishing | Guided tours | Golf | Tennis | Indoor Pool | Pool Table | Ice Skating |
|-------------------------|---------|--------------|--------------|-------------|-------------|-------------|---------------|------------------|-------------------|-----------------|-------------|-----------|---------|-------------|-----|--------|-------------|-----------|-------------|
| Whistler Resort, Canada | ✓       | ✓            |              |             |             |             |               |                  |                   |                |            |           |         |             |     |        |             |           |             |
| Aspen Resort, Colorado  | ✓       | ✓            |              |             |             |             |               |                  |                   |                |            |           |         |             |     |        |             |           |             |
| Vail, Colorado          | ✓       | ✓            |              |             |             |             |               |                  |                   |                |            |           |         |             |     |        |             |           |             |
| Beaver Creek, Colorado  | ✓       | ✓            |              |             |             |             |               |                  |                   |                |            |           |         |             |     |        |             |           |             |
| Keystone, Colorado      | ✓       | ✓            |              |             |             |             |               |                  |                   |                |            |           |         |             |     |        |             |           |             |
| Breckenridge, Colorado  | ✓       | ✓            |              |             |             |             |               |                  |                   |                |            |           |         |             |     |        |             |           |             |
| Copper Mountain, Colorado| ✓    | ✓            |              |             |             |             |               |                  |                   |                |            |           |         |             |     |        |             |           |             |
| Killington, Vermont     | ✓       | ✓            |              |             |             |             |               |                  |                   |                |            |           |         |             |     |        |             |           |             |
| Bromley Mtn, Vermont    | ✓       | ✓            |              |             |             |             |               |                  |                   |                |            |           |         |             |     |        |             |           |             |
| Smugglers Notch, Vermont| ✓       | ✓            |              |             |             |             |               |                  |                   |                |            |           |         |             |     |        |             |           |             |
| Stratton, Vermont       | ✓       | ✓            |              |             |             |             |               |                  |                   |                |            |           |         |             |     |        |             |           |             |

- = Resort has resources/facilities for this activity
REFERENCES


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Research Programs

Tourism is a dynamic industry comprising many sectors from accommodation to hospitality, transportation to retail and many more. STCRC’s research program addresses the challenges faced by small and large operators, tourism destinations and natural resource managers.

Areas of Research Expertise: Research teams in five discipline areas - modelling, environmental science, engineering & architecture, information & communication technology and tourism management, focus on three research programs:

- **Sustainable Resources**: Natural and cultural heritage sites serve as a foundation for tourism in Australia. These sites exist in rural and remote Australia and are environmentally sensitive requiring specialist infrastructure, technologies and management.
- **Sustainable Enterprises**: Enterprises that adhere to best practices, innovate, and harness the latest technologies will be more likely to prosper.
- **Sustainable Destinations**: Infrastructural, economic, social and environmental aspects of tourism development are examined simultaneously.

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