

MOUNTAIN[S] TREND BOOK

2021-2022
Edition



FORECASTING THE FUTURE OF MOUNTAIN TOURISM

Cluster 
montagne
Mountain Development France

A CLUSTER OF
 **La Région**
Auvergne-Rhône-Alpes

IN PARTNERSHIP WITH


DES SAVOIE

LET'S SUPPORT THE PLAYERS



OF THE MOUNTAIN SECTOR TOGETHER.

CRÉDIT AGRICOLE DES SAVOIE IS COMMITTED TO THE FUTURE OF OUR MOUNTAINS.
LET'S ALL ENJOY MOUNTAIN ACTIVITIES TO THE FULL AND CONTRIBUTE TO THE ECONOMIC
REVIVAL OF THE PROFESSIONALS WHO BRING THEM TO LIFE.

AS A LOCAL BANK, WE ARE THERE FOR YOU WITH OUR 47 MOUNTAIN
BRANCHES AND OUR TOURISM EXPERTISE.

**AGIR CHAQUE JOUR DANS VOTRE INTÉRÊT
ET CELUI DE LA SOCIÉTÉ**



DES SAVOIE

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When reality exceeds fiction, foresight takes on its full meaning.

What would we have said only 3 years ago, about an article in our Mountain Trend Book, which would have dared to describe what we have been experiencing since March 2020?

Reality really has exceeded fiction. But isn't this ultimately about the way we view what we call 'fiction'? This is the whole point of foresight: to cultivate a spirit of anticipation and open-mindedness and allow ourselves to imagine our own development scenarios. To accept change as the norm.

In the following pages, we will see how our ecosystem lived through last winter's "black" season, how some organised themselves to weather the storm and how others bounced back, innovated, and diversified, much faster than they could have imagined.

"This unprecedented season will probably have transformed our ecosystem and our economy on a long-term basis. For better or for worse? It is really up to each of us to find their own answer. Pessimists will mainly see the damage done to their hard-won legendary stability, whilst optimists will see real opportunities for developing their model and innovating."

I do not believe in going back to the beginning, but I do believe in collective effort and goodwill for building the tourism and economic mountain industry of tomorrow, a mountain industry that is sustainable, accessible and innovative. Who is better placed than those involved in the mountains themselves to address these challenges? We enjoy an extraordinary treasure: the nature that surrounds us and the benefits it offers those who take the trouble to discover it and respect it, in both winter and summer. It is this balance between economy and local life, development of tourism and sustaining nature, that we must work on together. It is a project that will require a great deal of foresight to inform our choices and guide our experiments. Happy reading!

Patrick GRAND'EURY
Executive Chairman of the Cluster Montagne



And that makes 3!

This is already the 3rd trend book that we have put together for you and which is opening the long-awaited 2021/2022 season!

3 good reasons to continue our commitment to reflecting on the future of our mountains:

- » It is a long process of maturation that has only just begun and every year we have to innovate to reinvent ourselves, adapt to the changing context and capitalise on our previous reflections.
- » Things are changing everywhere and initiatives for imagining our future at altitude are flourishing. This abundance of ideas is a breeding ground for tomorrow's solutions.
- » Both the Cluster Montagne and the Crédit Agricole des Savoie have a long-term vision and an important responsibility in the direction we want to give our territory. Let's be actors and not spectators!

"What is certain is that there is no unique situation and that every mountain and every resort will concoct its own recipe by drawing from the common pot of ideas that may emerge from this trend book."

At the end (we hope!) of an unprecedented crisis, our reflections are being nourished by new "input" that we must integrate into our imagination through keys to understanding that further strengthen the sociological and environmental elements.

The mountain, a safe investment, a lifestyle, nature, a paradise for remote working and good health, is faced with the over-frequentation of certain resorts during peak periods and a model based on sports activities. But are the two visions incompatible?

This third edition of our Trend Book explores five trends for the mountains of tomorrow for you to discover.

Happy reading, enjoy the season and don't forget that this winter we are OPEN!

Cyril GOUTTENOIRE
Director of the Crédit Agricole des Savoie Tourism Department

2. PREFACE

UNITED IN REFLECTION

CLUSTER MONTAGNE

Created in 2012 on the initiative of the Région Auvergne-Rhône-Alpes and companies in the sector, the Cluster Montagne is the accelerator for sustainable development and innovation in the mountains. Through its networking, training, innovation and business development activities, the Cluster Montagne supports its members' development (companies, institutions, research and training establishments and partner territories) and contributes to the sustainable performance and attractiveness of tourist destinations in France. It is also the ambassador of French know-how on the international scene.

Its strategy, focusing on the challenges of tourism in the mountains (sustainability, interactivity, safety, consultation, accessibility, fun, performance) offers professionals a forward-looking vision and innovative pragmatic solutions for the sustainable development of mountain tourism.

The French mountain tourism industry represents more than 450 companies, 5500 employees and an annual turnover of over 1 billion euros.

FIND OUT MORE

www.cluster-montagne.com

CRÉDIT AGRICOLE DES SAVOIE

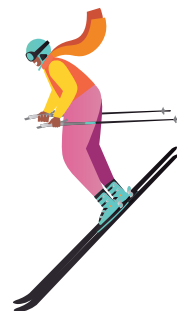
The Crédit Agricole des Savoie is a leading bank in Savoie and Haute-Savoie, serving more than 716,000 individual, professional and business customers. It is a major player in the development of the local economy: one in two inhabitants, one in four businesses and/or professionals and eight in ten young farmers are customers of the Crédit Agricole des Savoie.

It is also the bank for the tourism sector with a tourism division consisting of 8 experts, 47 branches in the mountain area and 18 tourism advisors throughout the Savoie.

Our goal is to provide targeted and personalised support to professionals in this sector which structures the territory's economy, in transforming their model to meet the new environmental and societal challenges.

FIND OUT MORE

www.ca-des-savoie.fr



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This MOUNTAIN[S] TREND BOOK is produced by:

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3. INTRODUCTION

ABOUT PROSPECTIVE "HACKING" OUR WAYS OF THINKING

Have you realized?

Over the past few years, one thing has become certain. It is a subtle and very delicate evidence which can appear when, by magic or even by a miracle, one of our screens or radio devices offers our brain a few minutes of respite: our increasing difficulty in exercising our critical skills with solidity and discernment.

Listening, curiosity, modesty, autonomy or lucidity: all our "soft skills" and "know-how" scattered to the four winds of our cognitive biases, these mental shortcuts that we happily take in case of emergency or uncertainty.

If we think we know what others think?... A bias of the curse of knowledge! When we put off a decision that has a potentially decisive impact?... A bias of the status quo! When we have the feeling that we give too much weight to banal questions... Parkinson's law of triviality!

Getting information to inform our choices has never been so complex: information overload, content filtering, false information, special effects... Our cognitive biases have never had it so easy.

Hacking our ways of thinking

Fortunately, our brain is also designed to adapt and learn. Feeding it with the right ingredients and guiding it with appropriate methodologies will be a key to success for our future decision making... In all modesty, this is the goal of this MOUNTAIN[S] TREND BOOK.

Every day, we have a greater understanding of the need for foresight: detecting, analysing and sharing in order to anticipate and act. This trend book is here, along with other tools, to encourage us to listen, broaden our field of vision (or even change our glasses), stand back, guide us in our strategies and to animate the resilience and the transformation of the mountain territories.

An international vision

Opening, comparing, taking inspiration. In this third edition, we offer you the accounts of 22 French and international experts. Each in their own field and context shares their visions, their questions and their certainties, with the aim of inspiring and confronting points of view to live the mountain of today and imagine the one of tomorrow. We invite you to embark on our ISS (International Space Station) to look at our mountains from a little further away!

Too simplistic? No, pragmatism and action!

We are firmly convinced that time taken to reflect is a precious investment for being more efficient in action. Being more efficient in action also means acquiring pragmatic tools and methodologies that we can apply individually or collectively. This year, we are sharing with you tools for innovation and creativity that are particularly well adapted to the context of mountain territories.

The world is vast, the stakes are numerous and high, the future is obviously uncertain, but the players and the mountain territories are highly resourceful. Did you know?

WHAT IS OUR SCOPE OF REFLECTION AND OBSERVATION?

We look into the economic ecosystem specific to the mountain territories.
New this year, we look beyond France to discover the challenges of international resorts.



4. PANDEMIC! AND AFTERWARDS?

How Covid-19 accelerated certain aspects of the transition in the mountain sector.

Will we be able to adapt?



Cécile RONJAT • Journalist, Cosy Editions



Equilibrium,

"The right proportion between opposing elements, antagonistic forces, resulting in a state of stability and harmony". The French dictionary Larousse

Between the infinitely small and the immensely large, between individualism and the collective, the past and the future, mistrust and benevolence, the global and the local, there is one path: that of balance.

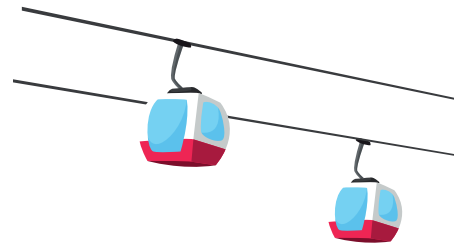
COVID, THE CATALYST OF A MODEL ALREADY IN MUTATION

A little less than two years after the start of the pandemic and its cataclysmic consequences, the first assessments can be made. However, there is nothing that we did not already know, except for the facetiousness of a temporality that is inexorably racing ahead. The hyper-industrialisation of our societies, the dependency of high-altitude tourism on skiing and the winter season, climate change, cold beds, carbon-based mobility, flow management, changes in customer expectations: the pandemic, its administrative crystallisation and the need to reinvent products without prior warning have only put a gloss on the transition points that the mountain ecosystem already grasped years before. Of course, from a systemic point of view, the call to order has been extremely violent and the invitation to change immediate.

4. PANDEMIC! AND AFTERWARDS?

However, there is no mistake. The decades of growth and healthy contributions of high-altitude tourism to the local territories are a powerful lever for reformatting the model in a sustainable way based on its backbone: skiing. The real challenge is to act now so as not to suffer later or open the door to extremes. Reality is polymorphous and highlights its faces: There is not one, but many changes to be made, just as there is not one, but many territories. Energy, economic, ecological, societal and governance transition: each mountain has in its DNA the assets to build a model that is resilient, innovative, virtuous and profitable for all. Reconciling economic development and sustainability certainly seems within the reach of coordinated, collective action.

"Doing better with less: a dream's seedbed is extremely fertile when the mountain already provides the setting and all that remains is to build the story."



INITIATIVES AND INNOVATIONS, THE ECOSYSTEM AND ADAPTATION

And initiatives everywhere are giving rise to innovations and tools to offer foresight. The Cluster Montagne is one of the first instigators through its trend books and the Cluster Montagne Labs' calls for projects, or the very recently-created incubator, Alpes Tourism Lab. In Courchevel, MET 2021 (Mountain. Ecology. Technology) invites project leaders to think together about the major themes of tomorrow: tourism, sport, mobility, eco-responsibility, energy and real estate. From forums on the transition of mountain tourism to conferences on relaunching tourism in the Alps, the ecosystem is gathering its driving forces around the table, from all sides and of all faiths, to listen to each other, engage in reflection and move forward collectively in action.

On the issue of global warming, Métabief resort is already committed to a transition plan anticipating the end of the viability of its skiing activity by 2030-2035. By balancing the financial risk and diversifying investments to secure what already exists and boost the future, the plan is taking the future in its stride. Elsewhere, it is the technology applied to snow canons and grooming machines, connected big data and prediction systems that will lead to adaptation. Using the Climsnow tool, for example, resorts can now quantify the evolution of the snow cover over the coming decades, to determine the equipment schemes that will optimise their skiing potential.

4. PANDEMIC! AND AFTERWARDS?

On the issue of low-carbon transport, there is an increasing number of projects for lifts from the valley. From Magland to Flaine, from Bozel to Courchevel, from Aime to La Plagne, in the Mont Blanc region or in Oisans, cable cars and funiculars will soon relieve road traffic by linking the valley to the resorts. Players are working on reducing their impacts and the carbon footprint in these territories, initiating greenhouse gas assessments to model the present and improve the future, particularly by using data in intelligent control systems.

And this is without counting on creative marketing to balance activity better over the four seasons. Tourism based on space rather than mass, tailor-made experiences, hyper-connection along with hyper-disconnection, staycations, opportunistic tourism, emergency tourism and regenerative tourism: trends are opening up hybrid development paths. While slow tourism puts agropastoralism, authenticity, heritage and gastronomy at the centre of the experience, elsewhere the environment is made magical once more through the symbolism of the summits. Doing better with less: a dream's seedbed is extremely fertile when the mountain already provides the setting and all that remains is to build the story.

An aware and shared future

We have all the cards, but for the transition of the mountain universe to be sustainable, the need for change must be aware and shared. How can we really get through to the whole of the first circle ecosystem, the social professionals and the customers themselves, to encourage collective action without returning to old habits or resorting to disruptive policies? The tools of awareness have to be objectified and invented, but what a fantastic opportunity to be our own authors and interpreters!

Assuredly benevolent and shared, obviously co-constructed, innovative and sustainable: tomorrow's mountain is a roadmap of all possibilities and it is in our interest to be as daring as the pioneers of the mountain peaks were. Testing, accepting mistakes, trusting each other, releasing energy to find the right balance: our territories are open-air laboratories.

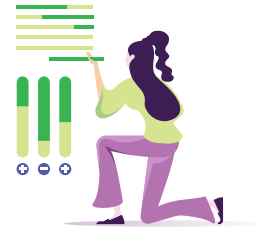
A place to live, work, play, experience and replenish, the mountain of tomorrow can be everything at once. The ambition of harmony is a springboard and the rebound a driving force. Equilibrium.

"Assuredly benevolent and shared, obviously co-constructed, innovative and sustainable: tomorrow's mountain is a roadmap of all possibilities and it is in our interest to be as daring as the pioneers of the mountain peaks were."



4. PANDEMIC! AND AFTERWARDS?

"Testing, accepting mistakes, trusting each other, releasing energy to find the right balance: our territories are open-air laboratories."



FRANCE: THE "AVENIR MONTAGNES" GOVERNMENT PLAN

The French "Avenir Montagnes" plan aims at accompanying the mountain territories towards a resilient and sustainable offer that is adapted to each mountain's specificities, based on three axes and 640 million euros of loans:

- » Encouraging the diversification of the tourism offer and the conquest of new clienteles;
- » Accelerating the ecological transition of mountain tourism activities;
- » Boosting leisure property and stopping the creation of "cold beds".

In particular, the government is launching the "Avenir Montagnes" fund with a budget of €331 million, €300 million of which, co-financed with the territories, will support investments that are in line with the plan's priorities, with €31 million going to support territorial engineering



THE AUVERGNE-RHÔNE- ALPES REGION'S "PLAN MONTAGNE II"

"This Plan Montagne II offers a unique opportunity to invent the mountain of tomorrow. Tomorrow, our mountains will be a real showcase for our region's economic dynamism and the innovation of our entrepreneurs", Laurent WAUQUIEZ, president of the Auvergne-Rhône-Alpes Regional Council.

The plan provides for a budget of €100 million, divided into 4 priority areas:

- » Supporting sustainable development and energy transition projects (€10M);
- » Diversifying the tourism offer and reducing dependence on climate hazards (€15M);
- » Ensuring the sustainability of the winter season by securing snow cover (€30M);
- » Making it easy for all local students to learn to ski and discover the mountains (€6M).

Three additional provisions complete the measure: aid for the renovation of leisure real estate and holiday centres (€10M), support for small resorts (€5M) and support for valley lift projects (€20M).

5. FLEXING OUR REFLECTING SKILLS

5 trends and 16 French experts who offer us their views.

They each share their visions for their own field, with the goal of inspiring and contrasting different points of view, to imagine the mountain of today and tomorrow.

THE TRENDS

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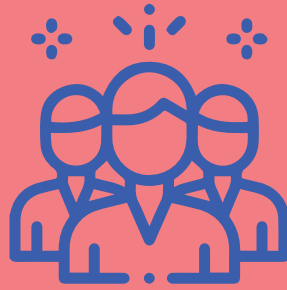
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TREND 1

A SOCIOLOGICAL VIEW

Sociology, anthropology, psychology: the social sciences have always worked side-by-side with those involved in tourism to provide them with prospective elements, behavioural expertise or other information from applied research. What is the goal? To lead to reflection, as here with Philippe Moati, Associate Professor of Economics at the University of Paris-Diderot, co-founder of L'ObSoCo (L'Observatoire Société & Consommation) and recently the author of "L'Observatoire du rapport des Français aux loisirs", published in March 2021, in collaboration with the Compagnie des Alpes.



A SOCIO-
LOGICAL
VIEW

INTERVIEW - The view of an observer of French leisure activities...



Philippe MOATI • Associate professor at the University of Paris and co-founder of the ObSoCo, l'Observatoire Société & Consommation

An associate professor of economics at the University of Paris, Philippe MOATI was one of the creators of the Observatoire Société et Consommation (ObSoCo). A specialist in industrial economics, he then contributed to work on trade, mass distribution and consumer patterns, which led him to question the developments in society. The transversal subject is that of the transformation of capitalism on the "supply" side, the structuring of the production base, the organisation of markets and the demand that goes with that. "All this feeds my attempt to understand the dynamics of the world we live in", he likes to say.

WHAT IS THE OBOSCO AND WHAT ARE THE MAJOR TOPICS OF RESEARCH YOU ARE WORKING ON IN PARTICULAR?



Philippe MOATI: The ObSoCo was created 10 years ago. It is both a research and consultancy company and a network of academics whose members share an interest in observing and studying the transformation of consumption and upstream sectors. It is a structure whose work is underpinned by the same hypothesis: we are experiencing a shift in consumer patterns; we are moving away from the model established during the post-war boom years and developing an alternative model of

consumption. We therefore have the task of considering and observing what is happening. We carry out general and specialized surveys on the different aspects of these emerging realities by measuring and trying to understand what motivates behaviour. This is then fed into our analytical frameworks which allow us to theorise and interpret the results...

5. FLEXING OUR REFLECTING SKILLS - TREND 1



THE REPORT BY THE FRENCH LEISURE ACTIVITIES OBSERVATORY
WAS PUBLISHED AT THE BEGINNING OF THE YEAR.

WHAT DO YOU CONSIDER TO BE THE MAIN POINTS OF THIS STUDY?

A SOCIO-
LOGICAL
VIEW



The study, conducted in partnership with the Compagnie des Alpes, provides a very comprehensive overview of French people's involvement in the different categories of leisure activities. It also focuses on holidays. This focus highlights the fact that the French still have a highly traditional approach to holidays: sea, sun, deckchairs, friends, family... All these elements are still very dominant when we think about holidays.

We asked what people do during their holidays and, for many of them, it is really a time for not doing much: rest and relaxation with friends and family. We observed, however, that young people have much more active holidays than the older generations.

This was a real surprise for me, as I thought that the French had a more active approach to their holidays...

I also thought I would find a greater tendency towards "de-massification" and "not following the crowd", influenced by individualism and a wish to stand out from the masses and cultivate singularity. But the results from the report do not reflect this. For example, when we showed people taking the survey photos showing different kinds of holidays to illustrate their idea of a perfect holiday, the deck chair on a deserted beach with blue sea was chosen systematically. Then there are the activities with family and friends.

The only element that goes towards this "de-massification" and which seems to be confirmed in a more recent study, is that the "club" and "holiday village" formulas come very low in people's expectations, while a family home and renting a house are preferred, which suggests a more individual approach and less dependence on the market system.

We do not have sufficient hindsight to know if this is a momentary trend due to the pandemic or if it is a long-term trend. We believe that this erosion is slow but sure, as this type of stay is less and less appealing to holiday-makers, who are looking for broader offers. In the visuals shown in our surveys, there were more specialist activities: elephant treks, yoga, choir singing, culture... where expectations were low, but existed nonetheless. This confirms the heterogeneity of demand. In other words, expectations are fragmenting around a hard core, which is a great challenge as well as a source of inspiration for suppliers, who must respond to expectations that are becoming more individualised.



5. FLEXING OUR REFLECTING SKILLS - TREND 1



A SOCIO-
LOGICAL
VIEW

FACED WITH THE CURRENT CHALLENGES, PARTICULARLY BUDGET, HEALTH AND ECOLOGICAL ISSUES, CAN LEISURE CONSUMPTION BE AFFECTED?



The way in which states have reacted to the health crisis is quite extraordinary and unexpected for a so-called "liberal capitalist" system. We shut down the economy because the priority was keeping people alive. We saw most states taking over to manage the crisis in emergency conditions, in uncertainty; State interventionism has regained its credentials.

The emergency interventionism deployed during the health crisis seems to be becoming interventionism for recovery, especially with the recovery plans and the billions put on the table. At the European level, we have managed to take on joint debts, a subject that was previously totally taboo. All this contributes to the fact that we were expecting an economic crisis driven by the health crisis, but so far we are not seeing the kind of shock we were expecting. Despite everything, the health crisis is not over and we should remain prudent, even if, globally, we can be pleasantly surprised on an economic level by the posture of the different States and the Western central banks, which have managed to break with monetary orthodoxy. Of course, these unprecedented policies run the risk of creating real inflation by creating excess money, but overall that was, and still is, a reassuring factor that has significantly cushioned the cost of the health crisis.

Next to that, there is a social and societal dimension. I insist on this point because the daily indicators show that "the pot is still boiling". People are still fed up, there is still a general feeling of distrust of the government, the system and the elites. The division in society is growing between those who are at ease in this world and those who feel that the world is turning the wrong way. The recent spike in energy prices and the upcoming spike in consumer prices are likely to exacerbate these tensions.

I would not be surprised if there were a major social crisis in the near future, as soon as the health crisis allows opinions to be expressed. That could jeopardise the strength of the recovery. There is a huge desire for change in France - 80% of the people surveyed expressed this - but when they are asked "what", we come back to the famous idea of "not following the crowd": some want to accelerate a transition to a different world (slowing growth), whilst others who are more at ease in yesterday's world want to get back to it and a rapid growth in purchasing power. There is no longer any ideology that we can hold on to, which is causing a stir. It is not clear what could come out of this, a new "Gilets Jaunes" movement, the arrival of the right man, populism? We will see...

We are also seeing a real surge in awareness of the seriousness of the environmental crisis and its link to our lifestyles. But are we ready to change our habits to help make things better? The Observatory of Responsible Consumption survey, which we carried out with Citéo, showed that nearly 44% of the population can be considered to be significantly committed to a mode of consumption that attempts to reduce their impact. While this extends far beyond activist circles, there is still much to be done. The people surveyed said that they lack information for making their choices. They may just be shirking their responsibilities, but there is still a long way to go to bring supply into line with society's expectations. Without voluntary change, consumers and businesses will face a hardening of regulatory obligations.

5. FLEXING OUR REFLECTING SKILLS - TREND 1




A SOCIO-
LOGICAL
VIEW

DO THE FRENCH CONSUME LEISURE ACTIVITIES IN A DIFFERENT WAY THAN THEIR NEIGHBOURS IN OTHER EUROPEAN COUNTRIES AND WORLDWIDE? WHAT MAKES OUR COMPATRIOTS DIFFERENT?

 The French are very committed to leisure activities, as we show in the report; nearly 80% of them say they have a leisure activity that they really love... It is therefore disturbing that this sector is lying fallow. There is no "leisure policy" to help people discover what they like and to help them acquire the initial skills. This is undoubtedly an interesting avenue to develop, particularly for children, but for adults as well. It could be players from the public or private sector who assume this role. We have estimated the leisure market (excluding tourism) at over a hundred billion euros...



WHAT INFLUENCE DO YOU THINK THE CONTEXT OF THE PANDEMIC HAS HAD ON CONSUMPTION IN FRANCE? AND ON TOURISM IN PARTICULAR?

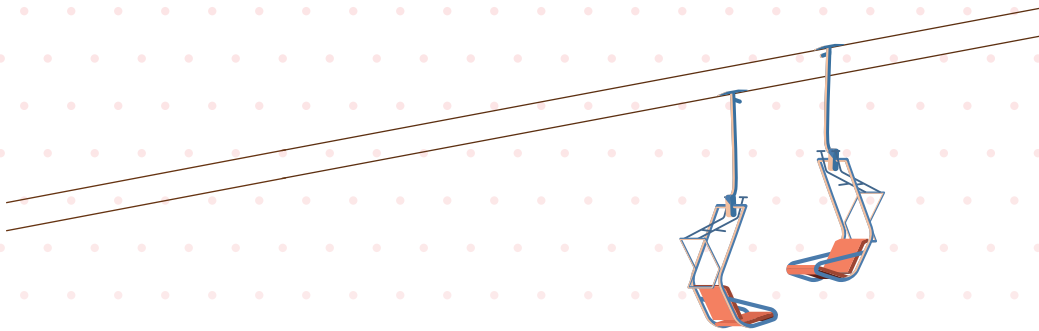
 During the pandemic, we saw a very strong desire to be outside our home, even if it was just to sit on a café terrace. We can imagine that it also made us want to go on holiday. At the same time, the health crisis has been an opportunity to strengthen people's attachment to their home. People have been spending a lot of money on their homes. The French, who already very attached to their habitat, invested a lot in it during this period, taking advantage of the lockdowns to improve their house, to do some DIY¹. I bring up this point, because we have seen that there is a certain fluidity between money spent on the house and money spent on a holiday. One can be set against the other. Those whose financial situation has improved during the crisis thanks to a forced reduction in consumption, are mainly the ones who probably have the means to do both. Having said that, the current lack of certainty is also encouraging people to save. We will see...

Globally, it also seems clear that holidays are now much more an opportunity to get close to nature. There is an idealisation of nature, doubtless encouraged by the periods of lockdown. In this sense, the artificial and mass nature of ski resorts built on this model perhaps reveal an offer that is out of step with expectations, like hypermarkets in the field of everyday consumption.

5. FLEXING OUR REFLECTING SKILLS - TREND 1



A SOCIO-
LOGICAL
VIEW



TELL US ABOUT THE STUDY CARRIED OUT WITH THE COMPAGNIE DES ALPES (CDA*).



At the ObSoCo, we work a lot on the relationship between consumption and well-being or happiness. Economists and psychologists have shown that when we already consume a lot, consuming more does not significantly increase the level of well-being. In reality, it depends on the type of consumption. We had the intuition that consumption associated with leisure activities is likely to help people experience pleasure and fulfilment and give meaning to their lives. With the CDA, we wanted to take a more general look at leisure, how the French are involved in these activities and the impact they have on their well-being. We defined two categories of leisure activities: on the one hand, active leisure activities whose practice "produces" something (an object, a work, a performance, etc.), and which typically requires a skill, an expertise. On the other hand, passive leisure activities that refer more to entertainment, or distraction.

Nearly 40 leisure activities were analysed in this study, to which we added another two points: holidays (perception of people's ideal holiday) and theme parks.

In addition to confirming the massive involvement of the French in leisure activities, the study's main conclusion is that active leisure activities generate well-being. We observe this on two levels: while we are doing them, we

experience positive feelings that contribute to our well-being, as well as conviviality and sociability, through networks for example.

The second level is more general: the more people are engaged in active leisure activities, the happier and more psychologically well they say they are. This should encourage us to think about how we allocate our financial and time resources. The difficulty resides in the fact that it is the intensity of our commitment that is linked to these benefits, which is closely linked to the acquisition of skills. This is where the problem lies: when you start a new activity, you don't necessarily have the skills and there is a risk of becoming discouraged and giving up in favour of less demanding passive leisure activities. Since our society promises immediate pleasure and with no suffering, these headwinds can dissuade people from going in a direction that could give them a great deal.

** Founded in 1989, Compagnie des Alpes (CDA), the current European leader in the leisure sector, operates the biggest ski resorts in the French Alps besides a range of exciting leisure destinations all over Europe.*

5. FLEXING OUR REFLECTING SKILLS - TREND 1



A SOCIO-
LOGICAL
VIEW

AS REGARDS LEISURE ACTIVITIES,
WHAT IS THE MOST STRIKING PHENOMENON
OF THE PAST FEW YEARS?



Without hesitation, I would say that it is getting involved in DIY, a form of active leisure, a subset in which "doing" replaces market consumption. For example, a quarter of French people say that they are working on objects, transforming and customizing them. When we ask people why they do DIY, they explain that it is firstly for pleasure and then for other societal considerations, for example "I have the item I really want" (which brings us back to the idea of not following the crowd, mentioned above), but also to control the way in which it is done as a reaction to a distrust of "commercial products", and lastly because of a desire to increase their autonomy with regard to a criticized commercial system.



¹ According to a study carried out by CSA Research for Cofidis France and Rakuten France in October 2020, nearly half of the French (48%) did DIY work in their home last year and 19% are planning work in the coming months. The trend is even more pronounced among people who work from home (61%), those in the highest income bracket (59%), homeowners (56%) and people living in a house (52%).

5. FLEXING OUR REFLECTING SKILLS - TREND 1



A SOCIO-
LOGICAL
VIEW



UNDERSTANDING THE CHANGES IN SOCIETY AND CONSUMPTION AND SUPPORTING THE STRATEGIES OF ADAPTATION

ObSoCo is a research and strategy consulting firm born in 2011 from the conviction that we are experiencing a period of profound transformation in the development model of Western societies. The consumption model is changing and the architecture of consumer markets is being redefined. All the economic and institutional players must now rethink the way they position themselves and create value to satisfy consumers and citizens. This task requires them to question their world views and to renew their concepts and reading grids, in order to make sense of the changes in society and consumption and adapt to them better.



Philippe MOATI - France

Associate Professor of Economics at the University of Paris, Co-founder of ObSoCo, The Observatory of Society & Consumption.

During the 23 years he also spent at CRÉDOC*, Philippe Moati developed recognized expertise on the retail sector, as well as on consumer behavior.

Among his latest works: "L'Observatoire du rapport des Français aux loisirs", published in March 2021 in collaboration with the Compagnie des Alpes. A collection of data, calculations and surveys that results in an analysis of the free time of the French during a year marked by lockdowns that is certain to draw out some big ideas in discussions with him.

* CRÉDOC, Centre de Recherche pour l'Étude et l'Observation des Conditions de Vie (Research Centre for the Study and Observation of Living Conditions), is a study and research organization at the service of economic and social players.

Since it was created in 1954, CRÉDOC has been analysing and anticipating people's behaviour in all their dimensions: consumers, business agents, social actors. Since 1978, it has put in place a permanent system of surveying the ways of life, opinions and aspirations of the French and specialised in the construction of information systems, ad hoc quantitative surveys, qualitative surveys through interviews or group meetings and in lexical analysis.



TREND 2

TRACKS FOR THE WINTER?

Can the winter evolve towards "x" season tourism? Which are the examples that work and can winter be used as a tool to develop the summer season? Should quotas be used to limit numbers of visitors?

Mountain towns: an opportunity to exploit tourist infrastructures year round?

Winter in the future raises many questions, which proves the interest of the topic and offers the hope of solutions that are already beginning to appear...



TRACKS FOR
THE WINTER?

From the 1970s to today: what changes have there been in mountain sports practices?



Véronique REYNIER • STAPS lecturer at Grenoble Alpes University, member of the SENS laboratory and associate researcher with the PACTE laboratory.

The 1970s marked the renewal of creativity in sport and caused profound changes in the mountain environment where tradition had been particularly prevalent until then. Centred around skiing and mountaineering, mountain sports thus engaged in a process of transformation and diversification, which has not stopped since. Sports creativity was expressed on the slopes and cliffs, in snow, water and the air, and seems to be limitless. This inventive dynamic was marked by different periods of evolution and is characterised today in the mountains by the extreme diversity of sports activities and forms of engagement.

"Initially reserved for exceptional athletes, adventure and the extreme are becoming widespread reference models."

HARMONY RATHER THAN PERFORMANCE

The wind of freedom and creativity that swept through the valleys at the end of the 20th century contributed to the diversification of ski equipment and the invention of new sports, both in the resorts and in undeveloped or poorly developed terrain. It is no longer the time for conquest, effort and performance; It is now a question of expressing one's

thirst for freedom, being in harmony with nature and finding pleasure in "taming" the resources the mountain has to offer. The field of possibilities is multiplying, equipment is being renewed, the way the mountains are used is being transformed, paths are being "freed up" and new recreational areas are being created. Activities as diverse as paragliding, snowboarding and climbing are the symbol of a way of life based on nature, pleasure and sensations.

5. FLEXING OUR REFLECTING SKILLS - TREND 2



TRACKS FOR
THE WINTER?

CONFRONTATION WITH UNCERTAINTY

This evolution in sports practices is part of an international context of social and cultural mutation, with roots in the protest movements that started in the United States in the 1950s. Rising up against the consumerist habits and conformism of their fellow citizens, the leaders of American counterculture defined life principles that encouraged play, the search for real thrills and the transgression of the norms in force. In the field of sport, it was the Californian surfers who were the first to claim the foundations of this movement in their activity. They were to be emulated by many others, particularly in France, where these practices were grouped together under the generic banner of "board sports" in the 1980s. Despite the "technical" character of this term, it refers mainly to the symbolic aspects of the practice, which explains why climbing can come under this appellation, unlike downhill skiing, which is deemed too rigid and formatted. These activities have a transgressive aim, they express a desire to overturn the codes and oppose the established social order. They are more than simple leisure activities, they are real "lifestyles", alternative and distinctive. Whether they have been developed in resorts or elsewhere, "board" activities introduce uncertainty into the mountains as regards defining the meaning of space and sporting ethics. They have opened the codes and made a diversification of activities possible, which has continued ever since.

The evolution that will follow will be marked by the radicalisation of the commitment, with the development of sports activities in which the notions of 'extreme' and 'adventure' seem to take precedence over the 'fun' dimension. It is about pushing and testing one's limits by engaging in practice conditions that exacerbate uncertainty. This confrontation with uncertainty may sometimes include putting oneself in extreme danger (perfectly illustrated by base jumping or using a wingsuit) and/or confronting one's physical and mental limits (the race to climb peaks in record time in mountaineering is an example).

"Sports activities are being combined and hybridised, broadening the field of possibilities and giving people the chance to 'live' their relationship with the mountains in an eclectic way."

SLOW MOTION!

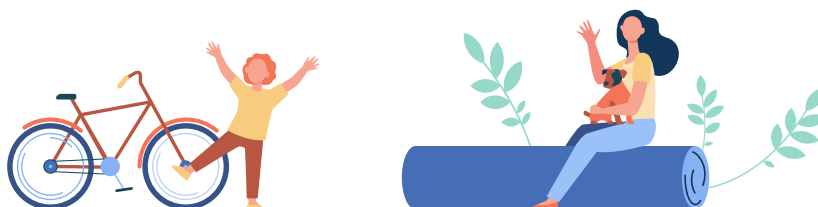
Initially reserved for exceptional athletes, adventure and the extreme are becoming widespread reference models; the mountain is thus becoming the subject of all kinds of sporting "exploits". Challenges are becoming self-challenges and are therefore more accessible. The craze for ultra-endurance events and adventure races is an illustration of this, as is the appeal of activities like rafting or canyoning.

More recently, the evolution of mountain activities seems to have been marked by a search for simplicity, authenticity and sobriety. It is no longer the time for radicalism, excessiveness or exploits. Activities are more "sustainable" and "softer", allowing for immersion in nature, experienced as a space where people can reconnect to themselves and others. The mountain therefore becomes a precious asset that must be (re) discovered slowly and discreetly and protected in the spirit of "leaving no trace". The growth in the number of hikers, ski tourers and snowshoers reflects this aspiration for an "undeveloped" mountain and an activity relationship based on well-being. These activities, which typically require no particularly demanding skills, allow people to adapt their practice to their own level of potential. Segmentation and differentiation then give way to meeting and sharing.

5. FLEXING OUR REFLECTING SKILLS - TREND 2



TRACKS FOR
THE WINTER?



The mountain now hosts a multitude of activities, which bear the marks of the social, economic, political and climate contexts in which they developed. They translate an evolution of mentalities and needs, but are not usually an expression of radical ruptures, as was the case in the 1970s, which initiated this movement of sporting creativity. We are no longer in dissidence and differentiation, nor in a "sport mono-culture which limits the relationship with nature to performance, ordeal, fun or challenge" (Corneloup, 2011, 7). Sports activities are being combined and hybridised, broadening the field of possibilities and giving people the chance to "live" their relationship with the mountains in an eclectic way.

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Véronique REYNIER - France

Véronique develops research projects focusing on the evolution of mountain sports activities, our relationship to risk and the transition of the mountain areas. She co-manages the MSTM (Sport Management: Tourism and the Mountains) Master's programme with the aim of training management specialists for sports and tourism projects integrating the major challenges (social, economic and climatic) that the mountain activities and areas, which are currently undergoing major changes, are subject to.



TRACKS FOR
THE WINTER?

What if skiing became a truly collective experience?



Nico DIDRY • Lecturer at Grenoble Alpes University

While current consumer trends show a real desire for sharing and collective experience, skiing - due to its structural characteristics and a representation that is too rooted in a sporting and individual dimension - appears to be less in line with consumer expectations than in the past. What if we imagined a collective form of skiing?

THE SOCIAL AND EMOTIONAL INTERACTIONS AT THE HEART OF THE LEISURE EXPERIENCE



Social psychology and marketing research has long highlighted the importance of the social dimension of the consumer experience of leisure activities. We now know that leisure activities are not only guided by a search for individual experiences with strong emotional and hedonic dimensions, but that they are also based on an interpersonal dimension with a shared experience (Bourgeon-Renault, Filser and Pulh 2003).

The social interactions of leisure activities are sources of satisfaction for the consumer experience (Crandall, 1979, Kyle & Chick, 2002). Similarly, the lack of a companion is a major barrier to participation in an activity (Searle & Jackson, 1985). Lastly, it must be stressed that favourite leisure activities always include positive activity and interaction with others (Horna 1994).

Moreover, beyond social interactions, it is emotional interactions that are sought. In his work "Le partage social des émotions" (2005), Bernard Rimé showed that emotions are not lived for oneself but to share them. We then speak of the social sharing of emotion. More recent studies have confirmed that the collective emotional dimension is a central component of the recreational consumer experience (Didry, 2016).

5. FLEXING OUR REFLECTING SKILLS - TREND 2



TRACKS FOR
THE WINTER?

A high intensity and frequency of emotional exchanges will encourage the appropriation of the experience by the consumer and their immersion. In the context of music festivals, for example, festival goers develop real consumer strategies and logic according to this emotional dimension (Didry and Giannelloni, 2020). They shape their way of living the experience according to the emotional interactions they are looking for. "Living together" and particularly "sharing emotions together" are what count the most, which can be observed throughout the leisure sector.

THE SUCCESS OF SHARED ENJOYABLE EXPERIENCES

Moreover, this need to share our emotions is accentuated by the exponential use of social networks, which have made this sharing systematic, even if it is virtual, by all generations of consumers. These expectations go a long way to explaining the current success of fun shared experiences like Escape Games or Colour Runs (where the race is merely an excuse to share emotions). The common characteristics of these two experiential offers are linked to both the fun aspect and the fact that they offer continuous sharing time throughout the experience. In this sense, they respond perfectly to the current need of consumers.

"In order for skiing (strictly speaking) to become a truly collective leisure activity, the collective emotional dimension must guide decision-makers in the development of the on-piste offer. It is then about moving from the production of individual emotions to the production of shared emotions."

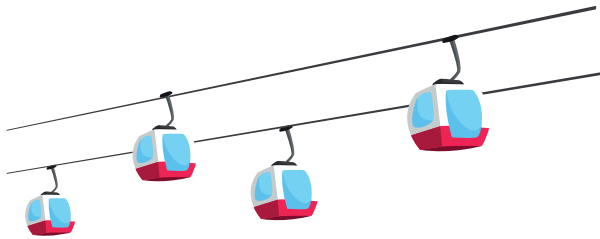
COLLECTIVE EXPERIENCES IN A RESORT ARE OUTSIDE OF SKIING TIME

Skiing, due to its structural characteristics, impedes emotional interaction. The social sharing of emotions works in three ways: via facial expressions, verbal expressions and postural expressions. From the point of view of facial expressions, wearing glasses or goggles and sometimes a neck warmer that covers the lower part of your face can limit the expression of emotions, which is a real hindrance to sharing in this way. Moreover, social and emotional interactions can only be put in place during static phases, in other words when you stop, and rarely while you are skiing down, which also limits the time given to these exchanges. Lift queues and the lifts themselves can offer an opportunity to talk, so long as you can sit with your friends at those times, which is not always possible at peak times, as cabins and chairs have to be filled. As regards lift queues, the emotional atmosphere can have a strong impact on the intensity and nature of the emotions. For conditions to lend themselves to sharing, you need to not be preoccupied by the person next to you trying to overtake or standing on the backs of your skis. The social density is therefore not often ideal for developing the emotional interactions sought. So, due to its nature as an individual sport, its organisation and its constraints in terms of equipment, skiing does not offer optimum conditions for continually developing emotional interactions. These therefore become episodic.

5. FLEXING OUR REFLECTING SKILLS - TREND 2



TRACKS FOR
THE WINTER?



"Emotions are not something to experience individually, but to be shared [...]. The collective emotional dimension is a central component of the recreative consumer experience [...]. In the context of music festivals, for example, festival-goers develop real consumption strategies and logic according to this emotional dimension."

However, in a ski area, we can identify three main areas where we can get together and hang out for a while. These three shared spaces are the snow park chill zones, the fun slopes with their modules and games where skiers do not go so fast and stop at certain points (like Marcel's Farm in Alpe d'Huez), and lastly the festive places (altitude dancefloors, like La Folie Douce, for example). These shared spaces are a real success in terms of people using them. It is worth asking to what extent the craze for ski-clubbing (partying on the slopes during the day in high-altitude bars transformed into dancefloors) fulfils this need for emotional interaction that skiing does not offer to the same extent. Indeed, one of the main characteristics of this festive experience is the production of collective effervescence (Durkheim, 1912) and the emotional communion (Maffesoli, 2012) that results from it. It upsets the apres-ski ritual, but also the logic of ski consumption, since skiers take time out from skiing to party: they want to be on the slopes but also to be able to share.

Most tourist offices have understood this desire to share and stage these moments in their communication, but often in a non-skiing context (apres-ski, restaurants, walks). So what can we do to develop emotional interaction during skiing time?



5. FLEXING OUR REFLECTING SKILLS - TREND 2



TRACKS FOR
THE WINTER?

CONSIDERING SKIING AS A COLLECTIVE EXPERIENCE AT ALL TIMES

This requires a change of paradigm and an understanding that consumers are not all there to hurtle down the ski slopes. Integrating the collective emotional dimension into the values of the skiing experience, in the same way as the aesthetic, sporting or disconnection dimension, is a first step. It is then a question of reconsidering the ski offer.

The right conditions for exchanges have to be created. One way would be to rethink the spatial organisation of skiing, by developing more areas of exchange, whether they be picnic areas, places to contemplate or take photos, or just safe stopping points, so that people are not stopping on the edge of the slope with a flow of skiers racing past them, but in a tranquil area, where skiers can give their full attention to interpersonal relations. The development of the ski slopes seems to be an important lever here. Similarly, considering the lift queues as a place where people can talk imposes alterations in its organisation, in order to achieve an optimal social density, in particular, which we then call emotional density.

The second stage of the reflection process, after seeking to facilitate the sharing of emotions, could also be to encourage emotional interactions through a collective experience. Proposing fun collective experiences, either by developing the terrain, or by implementing games and challenges, is an approach to consider at this level.

In order for skiing (strictly speaking) to become a truly collective leisure activity, the collective emotional dimension must guide decision-makers in the development of the on-piste offer. It is then about moving from the production of individual emotions to the production of shared emotions.



Nico DIDRY - France 

Senior lecturer, head of the "Economic Sport and Tourism Strategies" Master's degree and researcher at the CREG at Grenoble Alpes University

Nico Didry is a lecturer and researcher at Grenoble Alpes University, specializing in the study of consumer behaviour. He uses an ethno-marketing approach to investigate in-depth consumer emotional experiences which are at the centre of his research. Long involved in the world of snow and mountain sports (coach of the French snowboard team, head of snow sports at the university), his playground is also his laboratory.





TRACKS FOR
THE WINTER?

Microadventures: a sustainable territorial perspective?



Dominique KREZIAK • Lecturer-researcher in marketing at the IAE Savoie Mont Blanc University and member of the IREGE research laboratory



Davy DEMALINE • Project manager for Outdoor Tourism and Ecological Transition

A microadventure is "an adventure that is short, simple, local and cheap" according to Alastair Humphreys (English adventurer, author and motivational speaker), who popularised the term in 2012.

"The health crisis has further accentuated the desire for nature, as shown by the number of visitors who came to the mountains, even when the ski lifts were closed this winter."

He believes that you do not have to be Mike Horn and set off for the other side of the world, take a month off work or be in amazing physical shape. Microadventures consist of inserting activities and/or moments of adventure into daily life: organising a bivouac one night a week, enjoying an evening around a camp fire after work, paddleboarding on an urban river and, more generally, exploring nearby natural areas as part of a short trip over the weekend... The basic idea could be summarised as follows: there is no need to go far or for a long time to experience a change of scenery, an "adventure". It is possible to create this feeling by taking a step back and getting away from the habits

and lifestyle of daily life, by recreating "off-duty" moments in the space-time of everyday life. A microadventure is more a state of mind and a situation than a set of new practices.



5. FLEXING OUR REFLECTING SKILLS - TREND 2



TRACKS FOR THE WINTER?

A TERM THAT CRYSTALISES

A DESIRE FOR NATURE

AND PROXIMITY

This concept is already quite successful and is attracting growing interest in the media and with an increasing number of professionals. A fashion or a real trend? Only the future will tell, but the topic is already being debated, as the concept gives rise to various interpretations and variations, due to a relatively open definition and the relativity of the notion of adventure. Indeed, where is the adventure in a simple walk in the countryside? The concept's success has given rise to new operators on the market, like Chilowé or Deux Jours pour Vivre (Two Days to Live), which propose ideas, itineraries and practical advice on how to create your own microadventures, and in some cases even sell them as turnkey products. A study² carried out this spring shows that a number of tourist destinations are also using this term, simply affixing it to pre-existing leisure and service packages and thereby diluting the initial meaning of a concept with strong links to the notions of autonomy and short trips. Is a microadventure still a microadventure if it is commodified and organised, in other words taken over and digested by the tourist offer system? ; Or does it lose its soul and its sense? This debate, which also remains open, often characterises the diffusion process of any innovation that becomes commonplace, whether the innovation emerges from users, as is the case here, or from providers. Giving a name to a term does not invent a phenomenon, but makes it exist. The response to microadventures shows that the term itself has made it possible to crystallize and make visible diffuse trends which have found an incarnation in this concept: the desire to reconnect with nature, the revaluation of what is local and nearby, as well as the expression of the prevalence of ecological concerns. What are microadventures a sign of? What do they say about tourism practices? What do they say about customers and society? What can the territories and tourist organisations do with this trend? Is it a sustainable practice?

"Microadventures are therefore more a state of mind and a situation than a set of new practices."

DIFFERENT LOGICS

Observing people doing sport outdoors, I and my colleagues and co-authors, H  l  ne Michel and Marielle Salvador identified several types of practices linked to microadventures, several ways of interpreting the concept and several types of logic used by those practising them³. The practice can globally be interpreted as a form of re-enchantment of the everyday and local, a way of reintroducing the marvellous and the extraordinary into the experience of ordinary places and everyday life, a happy porosity between the space-time of the everyday and holidays. It is certainly a quest to give life a sense, a desire to make the most of your local area and get away from the constraints of daily life. But for some people, it can also be similar to a productivist logic of doing away with idle time, a post-modern quest for optimisation, by interposing as many meaningful activities as possible in each temporal interstice of one's timetable. A logic of collection and distinction can also be at work, consisting of ticking all the boxes of the to-do list of a successful existence one by one, with the 50 or 100 or 1000 things to do/see/visit/try in life, another source of bestsellers, and a sign of post-modern accomplishment. Lastly, a fun and creative logic is expressed, with a personal re-writing of the rules of the legitimate adventure game in the practice of one's leisure activities.

5. FLEXING OUR REFLECTING SKILLS - TREND 2



TRACKS FOR
THE WINTER?



GOOD NEWS...

The health crisis has further accentuated the desire for nature, as shown by the number of visitors who came to the mountains, even when the ski lifts were closed this winter. Sales of bivouac equipment soared during the spring and summer. The debate is open on whether this is a legitimate practice; and it is easy to scoff at the use of the term adventure: Where is the adventure in the simple fact of going outside, or even sleeping outside, when you are just next to your own home? Especially as the professionals of mountain tourism themselves often practice outdoor activities and short trips (without calling them microadventures) and do not see anything extraordinary in them. But what about other people? The majority of people who live in the Alpine valleys who do not come to the mountains, ski or hike? What about the young people who are not attracted by the mountains? If microadventures make them dream, isn't that good news? The powerful imagination of adventure can blow over medium- and high-altitude mountain areas, with a variable physical and temporal commitment, sometimes just for an evening or a weekend. There is increasingly the idea that these areas can be visited not only for physical activity, but also to be enjoyed simply for their amenities, some of which are a real luxury: space, coolness, contact with nature, an easy change of scenery that can be reconciled with everyday life.

... TO CONFLICTS OF USE

However, the desire for microadventure comes up against a number of pitfalls for the territories: hosting visitors who do not always seem to know or respect the site's rules and customs and, above all, visitors who may not bring in much in financial terms, as these are largely non-commercial activities. This summer, several territories were overwhelmed by a flow of visitors and had to take measures to restrict access. Re-discovering local tourism may be a sustainable practice, insofar as it makes it possible to reduce travel and its environmental impact, whilst having a potential positive impact on the development of some less visited areas. It also makes it possible to revalue a sort of tourist "localism", potentially more spread out over the season and in space than more traditional tourism. But the model reaches its limits when it induces or strengthens phenomena of overcrowding on certain sites, to which the Covid crisis has given a new visibility: littering, bivouacs and anti-social behaviour on private land, a failure to respect the basic environment-related rules... But what can be done with these new desires?

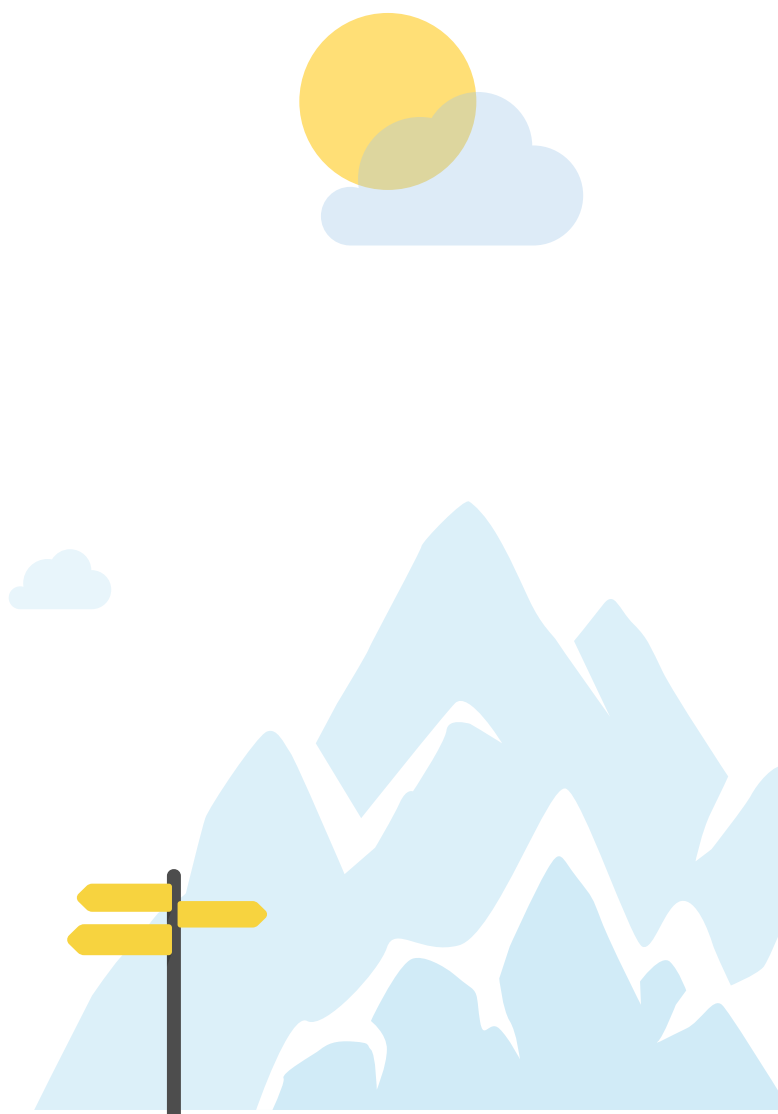
5. FLEXING OUR REFLECTING SKILLS - TREND 2



TRACKS FOR
THE WINTER?

RETHINKING THE IMAGINARY...

For a long time now, the players in the mountain territories have been wondering about their four-season attractiveness, outside of skiing alone. The desire for informal nature activities in the mountains is a very positive signal, a momentum that it would be a shame to stifle. The beach is a key location for informal activities, where you can spend time doing nothing in particular, just appreciating a place that is often free at the time, but which indirectly generates major benefits for the areas it is in. It is legitimate to want a direct and rapid economic return with visitors, but it can "pay" to widen the perspective, while the question of new visitors is being raised and destinations are vying with each other in terms of innovation to attract these clienteles and young people. Will the evolution towards four-season tourism, the diversification and re-enchantment of mountain destinations that everyone is calling for to ensure the sustainability of tourism and the transition of the territories only come from paying visitors, who have passed all the tests of acculturation to the mountain environment and carefully respect the sometimes implicit rules, visitors who spend money and correspond perfectly to the offers developed for them by the players in the tourism sector? Maybe not. Spontaneous practice can then be interpreted as a market signal, a form of innovation by pilot-users that is spreading. Perhaps these new, or particularly more visible, forms constitute a form of unforeseen innovation, that it would be advisable to adapt to. "Bivouacs in the cool" in summer, which some destinations are beginning to consider, could be a source of inspiration.



5. FLEXING OUR REFLECTING SKILLS - TREND 2



TRACKS FOR
THE WINTER?



"The practice [of microadventures] can globally be interpreted as a form of re-enchantment of the everyday and local, a way of reintroducing the marvellous and the extraordinary into the experience of ordinary places and everyday life, a happy porosity between the space-time of the everyday and holidays."

... AND THE STRUCTURING OF RECEPTION

Are the mountain areas ready and prepared to receive these microadventurers, many of whom are not so much looking for activity as for the experience of autonomy and space? The question of protecting nature and the territory will have to be thought through with these new uses. Taking the latter into account, or their increasing numbers, the conflicts they generate, responding to the desire for nature and taking advantage of the positive imagination of microadventure can be an opportunity to reflect collectively on a new structuring of natural spaces, in a logic of transition. Must microadventurers be left to evolve freely? Fortunately yes, in many cases, but not in all conditions. Some will want supervision and/or quality accommodation and will find what they are looking for in the current changing offer. Others will absolutely not want to be accompanied. However, like in nature parks in North America, hosting can also mean channelling. Thus, developing very basic bivouac areas could make it possible to control, regulate and limit damage: large pitches (because the luxury here is space), a fixed metal cylin-

der for the fire (and a ban on making fires elsewhere that is checked), sometimes a collective water point, basic sanitary facilities, a large rubbish bin where possible or clear information on why there are none and the necessary individual management of waste, for a price that is often very low... are all avenues to explore. This availability of affordable alternative solutions that respect the desire for space and simplicity can make bans and/or access restrictions (quotas, reservations) to other sites more legitimate. It can make it possible to distribute use of the space and relieve congestion at busy points, where the issue of quotas can be discussed. These reception points can also constitute networks for another form of travel in areas that are less developed in terms of tourism but that have a great deal to offer in terms of nature and cool temperatures compared to the extreme summer heat on the plains.

5. FLEXING OUR REFLECTING SKILLS - TREND 2



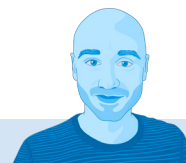
TRACKS FOR
THE WINTER?



Dominique KREZIAK - France

Lecturer and researcher in marketing at the IAE Savoie Mont Blanc University, member of the IREGE research laboratory, where she coordinates the Environment, Sustainable Consumption and Tourism axis. Her research focuses on consumer behaviour and the customer experience in the field of circular economy and tourism, with backing from the ADEME and the Labex ITTEM (Innovation et Transition Territoriale en Montagne). She is the scientific manager of the Sustainable Tourism Chair at the Savoie Mont Blanc University Foundation.

By relocating and remobilising the imagination of adventure, microadventures help to re-enchant everyday life and proximity through informal outdoor practices. They have not invented these practices but have helped to make them known and reinterpret them for a new audience of young, urban people, who may not (yet) have the codes.. They crystallise the diffuse but growing aspirations and expectations in society to reconnect with nature, revalue our local area, to be free and to construct our leisure activities, in a sustainable and environmentally-friendly way. Like any evolution in recreational habits, developing these informal practices raises issues of supervision and flow management and shakes up existing models and frameworks. But in a context of intense reflection on the diversification and renewal of the mountain in terms of imagination, on the sustainability and the transition of tourism activity models, this trend is an indicator and a signal of the evolution of the expectations of a young, urban clientele which it is relevant to study.



Davy DEMALINE - France

Project manager for Outdoor Tourism and Ecological Transition

Former director of Scènes de Musiques Actuelles, he has opted for a professional transition to the outdoor and sustainable tourism sector. In this context, he is studying for a Master in Tourism, Innovation and Transition at Grenoble University, for which he is producing a study on the development of the "Microadventure" in France and the opportunities this new concept offers for promoting slow and sustainable local tourism.

1 Philippe Bourdeau, "Territoires du hors-quotidien: a cultural geography of our relationship to what is elsewhere in contemporary urban societies; the case of sports tourism in the mountains and nature." HDR University of Grenoble, 2003.

2 Davy Demaline "La micro-aventure, facteur ou marqueur de transition" Thesis, University of Grenoble Alpes, 2021. www.dumas.ccsd.cnrs.fr/dumas-03345262

3 www.theconversation.com/la-microaventure-le-voyage-en-bas-de-chez-soi-125327
www.theconversation.com/le-domicile-nouveau-terrain-de-jeu-des-microaaventuriers-137112



TRACKS FOR
THE WINTER?

From sandcastles to paddleboarding. What the nautical sector is doing to encourage new customers to try water activities.



Adrien SANQUER • *Water sports and boating consultant for Wiinch*

A strong desire for the seaside, but not much action in the way of water sports. Once again this year, the seaside was the preferred destination of the French, far ahead of the mountains and the countryside. Tourist occupancy on the coast was very high during the summer of 2020 and 2021, driven by a strong local market.

"One of the structural challenges for the players in the water sports industry is to succeed in getting customers on the beach to try water sports through a renewed offer."

This even seem to be expanding to new periods of the year, sometimes to the detriment of the mountain (Christmas holidays...). Some tourist resorts, usually ones that are well connected to big cities, are even seeing a new dynamic of year-round residence. The sea attracts and fascinates people and the situation of the past 2 years has tended to strengthen this attractivity.

But, although many of the French go to the coast, few of them take to the water on a watercraft. The main seaside activities are still sunbathing, walking, making sandcastles and swimming... but not much is done on or under the water. The number of people who practice a water sport in a seaside resort is

much lower than those who participate in winter sports in a mountain resort. People generally go to the mountain to ski or hike, whilst we go to the seaside to... go to the seaside!

One of the structural challenges for those involved in water sports activities is to attract customers from the beach to water sports through a renewed offer. This is a complex challenge to take up, as water activities are often perceived as complicated to access, expensive and elitist... We therefore need to break down these prejudices.

5. FLEXING OUR REFLECTING SKILLS - TREND 2



TRACKS FOR
THE WINTER?

WATER SPORT(S)

Behind the technical term "water sports" lies a very wide range of practices and consumer profiles: pleasure boats (a market largely dominated by small motor boats), light sailing, board sports (kitesurfing, surfing, wing foil, etc.), rowing sports (rowing, kayaking, etc.), underwater activities... These activities can be supervised or practiced independently. They are aimed at a variety of customers and are part of very different development dynamics, with some very dynamic markets (surfing, wing foil, etc.) and others that seem to have been in decline for several years. The latter are faced with the real challenge of finding new customers who will bring new profiles to the practice, who consume differently and have different expectations... The problem is relatively similar to that of the "historic" winter sports activities.

Faced with this challenge, the players in the different water sports segments are organising themselves to attract new customers to their activities.



PLEASURE BOATING: "BOATING AS A SERVICE"

Historically, the pleasure boating model is based on the notion of boat ownership. More than 90 % of the boats moored in ports are privately owned with the average age of owners increasing by almost 11 months every year. This market is in a period of transformation, with a gradual shift from a logic of ownership to consumption and use. The historical model is still largely dominant, but we are seeing the emergence of a new mode of consumption of water sports, the development of which seems to have accelerated over the last two years. Thus, the number of boats registered annually in France fell sharply around 2008 and then stabilized, while the rental market and its more modern forms (Boat Clubs, supervised collaborative boating, etc.) is constantly developing.

The Covid context seems to have accelerated the observed transformations over the past several years.

The new boat market has developed very differently in different segments: the travel boat market has developed strongly, while sales of small motor boats have decreased, not necessarily because of a lack of demand, but because of the slowdown of certain production lines and longer delivery times, in a context of uncertainty among manufacturers. The second-hand market, in decline for several years, has bounced back with new, younger customers waiting for an immediate solution which they cannot have with new boats. Most boat rental operators and Boat Clubs had very good seasons in 2020 and 2021, with pleasure boating perceived as a safe activity relative to the health challenges and which allowed users to get away without going far.

In this context of change of consumption modes in the boating industry, the Bénéteau Group - a world leader in boat construction - has just announced a number of strategic acquisitions to move their model towards pleasure boating consumption rather than purchasing a boat (BAAS or Boating As A Service). They have therefore purchased the leading cruise ship charter

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TRACKS FOR
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"The percentage of people doing water sports in a seaside resort is much lower than that of winter sports enthusiasts in a mountain resort". People generally go to the mountain to ski or hike, whilst we go to the seaside to... go to the seaside!"

company Dream Yacht Charter and taken a stake in the American boat club "Your Boat Club", a way for the group to sell new boats to these operators, but above all to position itself on a new developing market. Marinas are also very concerned by these developments, as their historical clientele is ageing. Several of them are also positioning themselves on projects to develop new practice offers (the SELLOR's Breizh Boat Club, for example), whilst continuing to attract boat owners with specific support offers (handling courses and coaching proposed in the Loire Atlantique Nautisme ports, for example).



LIGHT BOATING: BETWEEN TRADITION AND INNOVATION

Light boating practices have also been undergoing significant developments, with historic practices that can be having difficulty finding new customers and, conversely, new practices that are exploding. The main dynamic is currently based on light machines - surfboards, paddleboards, wing-foils, etc. -, on rentals and group lessons, but above all, on independent practice.

Decathlon and its water-sports brands are playing a major role in this dynamic through their marketing of supports, most of which are inflatable, easy to use, inexpensive and suitable for learning. All the navigable lakes have been colonized by new users on inflatable machines aimed at the general public, bringing new customers to water sports.

Decathlon then developed products to accompany the rise in level of these users, with an offer that today allows them to win competitions. In addition to these supports that are very simple to use and with a growth curve that is not too steep, Decathlon is also positioning itself on the sailing market with a boat designed for beginners (Tribord 5s) and an innovative windsurf under its Tamahoo brand. These boats, still not seen very frequently on the water this summer compared to paddleboards and kayaks, are

5. FLEXING OUR REFLECTING SKILLS - TREND 2



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also designed for learning with sailing schools. Surfing has also been very dynamic for several years, possibly strengthened in the last two seasons, which is starting to cause problems of saturation in certain spots. Lastly, the practice of walking in water (sea walking) is developing rapidly on the coast, with extended practice periods. The activity has been built up as a supervised leisure activity, but also a sporting one, by "recycling" former long-distance runners attracted by the less traumatic nature of the activity.

For their part, water sports providers are developing their offers to propose alternatives to the traditional 5-day sailing course: rental points on beaches, as close as possible to bathers, multi-activity products, new supports, particularly foils...



GETTING OFF THE STREETS

Lastly, the Covid period has strengthened the place of water sports in "domestic and proximity tourism" (the "Staycation" concept). The different lakes and rivers located in urban areas are experiencing a continuous increase in the number of water sports enthusiasts: paddleboarding, kayaking, wild swimming... These nautical activities are also appearing more and more often on dedicated platforms, Chilowé in particular, with nautical supports becoming a way of discovering a territory (visiting the open-air dance halls on the Marne river on a paddleboard, or the Loire chateaux by kayak, etc.).



Adrien SANQUER - France



Consultant in water sports and pleasure boating / Founder Wiinch

A geographer by training, since 2004 Adrien Sanquer has been assisting the territories and their players in their nautical and port projects. He is involved in consultancy, studies and support missions, taking part in the various stages of nautical dynamics: market studies, strategies, development and programming projects, and changes in the way offers are managed.



TREND 3

TECHNOPARADE

Industry 4.0, automation, Artificial Intelligence... What can the mountain gain from the latest technological innovations? And how could the mountain benefit from Blockchain technology? What new services could be provided?



How can technology contribute to the development of the mountain resorts?



Alice MORABITO • Journalist, Cosy Editions

In fact, technology is everywhere and it can contribute to the development of the mountain resorts in many ways. It can considerably improve the safety of the ski areas and slopes, energy control and management (ski areas, resorts, buildings) and the customer experience. Knowing that it costs 7 times more to win a new customer than to retain one, here is an overview of the most attractive innovations and prospects that have been and can be conveyed at altitude.

Obviously, there is a before Covid and an after Covid. As Laurent Queige, director of Welcome City Lab, a start-up incubator dedicated to tourism explains, several major trends are emerging in tomorrow's mountain tourism. "Covid caused a real shock by moving the issue of local and responsible tourism from reflection and intention to action" he says.

SUSTAINABLE COMMITMENT

The result? People look for meaning and count on a real commitment by destinations and accommodation providers, through sustainable activities, charters and labels.

These are all selection criteria that need to be increasingly highlighted and are now relayed by fully committed tourism platforms, such as Vaovert, We Go GreenR and Fair B&B, which propose eco-responsible accommodation, gites and hotels. This trend has also been emulated in the business travel sector, with platforms like The Treep, which allows travelers to plan low-carbon trips, combining them with eco-hotels.

5. FLEXING OUR REFLECTING SKILLS - TREND 3



TECHNO
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DIGITIZING INTERACTIONS AS MUCH AS POSSIBLE

Contactless technology, accelerated by the health crisis, is also a strong trend, the idea being to offer fully dematerialized customer paths for equipment rental, ski lifts and accommodation rental and management, as well as for consulting information brochures and menus, such as the ultra-simple QR code process proposed by Edgar or Tab Hotel's digital check-in/check-out.

Digitization also concerns exchanges. This is what the tourist office in Val d'Isère is currently looking into, with the installation of video terminals in the ski area, via which users will be able to talk to tourist office staff in a direct and personalised manner, since it is not possible to have staff everywhere. "It is a human response using technology, stresses Christophe Lavaut, director of the Val d'Isère tourist office, because technology does not answer all the problems and it is important to measure it. I am in favour of its development, but it must be used properly, in the right place with the right people". So, no accumulation, but a good balance, knowing that 55% of interactions with customers are now digital.

GETTING FRESH AIR VERSUS WORKING REMOTELY

"The French mountain resorts can be a place to work remotely" analyses the director of the Welcome City Lab, "as well as a destination for short stays. It is a new opportunity for non-urban destinations. It would be interesting to combine professional coworking offers with rents." This is a trend with great potential, provided that you have a good network, which is one of the issues that resorts are working on. My Teletravel proposes a selection of gites and apartments (and campsites) adapted to working remotely, with appropriate pricing for long stays.



However, continuous access to information for visitors, and therefore tourists, is essential. "Even more than before, the issue today is having digital tools that allow us to have a continuous dialogue, which corresponds to the users' personalised profile", explains Laurent Queige. This implies a good command of tourism data, such as visitor numbers and mapping data.

DATA SHARING AND DATA LAB

If we already know how to collect data, the question of how to process it remains a crucial point. The goal? To group all the data from the tourist offices, the ski lift companies, the reservation centres, restaurants, etc, in order to offer customers a secure, easy, customised stay. "This sharing must always be done with the users' consent, to use their data for informational and non-commercial purposes only", specifies Christophe Lavaut who, with the different players in Val d'Isère, is working on a Data Lab under the leadership of CustUp. This is also the case for the solutions proposed by Intence and Lumiplan Montagne, which provide real-time information on the destination, the key points and flow management in the area... Like Affluences, which also manages site data in real time and allows one-click reservations, or e-Liberty, with the solution developed at La Clusaz, which combines its hands-free ski passes with entry to numerous other activities: free coffee, the ice rink, the museum... In short, options that offer an optimum customer experience throughout their stay, and even afterwards.

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CONTINUOUS INFORMATION TO ENRICH THE CUSTOMER EXPERIENCE

The question of information and access to it has therefore become evident and most resorts have developed their own app. So-called "painless" apps, i.e. ones that offer easy and intuitive navigation with push notifications (sent directly to the user without having to request them). This is the case with the new "Val d'Isère Ski" app, which keeps users informed of waiting times at ski lifts, opening and closing times of the slopes, the geolocation of shuttle buses, photo-video points and even their daily performance with the difference in altitude, the number of kilometres, suggestions for itineraries and activities in the area... Or Vizity's interactive maps which propose personalised routes.

Clearly what most, if not all, the resorts will be proposing soon. Particularly, as Christophe Lavaut reminds us: "The mountain resorts have often been pioneers in many areas". A place of pioneers and innovations. QED.



The 12 start-ups/ companies with innovations to remember



Eco-responsible accommodation and destinations

- » Vaover
- » We Go GreenR
- » Fairbnb.coop



Dematerialization

- » Edgar (concierge QR-code)
- » Tabhotel (digital check-in & check-out)



Accommodation adapted to working remotely

- » My Teletravel



Low carbon, eco-responsible business travel

- » The Treep



Data sharing

- » CustUp
- » Intence
- » Lumiplan Montagne
- » Affluences



Richer customer experience

- » e-Liberty
- » Vizity (interactive cards)





TECHNO
PARADE

Will "blockchain" technology soon be revolutionising mountain tourism?



Nadège CERETTO-PARIS • Journalist, Cosy Editions

With the aim of accompanying reflection on the mountain of tomorrow, the Cluster Montagne participated in the SIDO, the annual trade show for new technologies at the service of individuals, companies and communities in Lyon, France. Technological watch report following this event.

During the trade show, several technological themes animated the debates: digital identity and network security, 5G for the critical and massive IoT (Internet of Things), the security of connected objects or the very trendy notion of "blockchain". This concept is already widely used in Asia (China, Singapore and Thailand in particular), and is certainly complex to grasp at first glance, but is nonetheless worth understanding and exploring... Let's discover how, well beyond social networks, this innovative principle could revive and optimize the mountain tourism services sector post-Covid...



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DATA, YES, BUT SO MUCH MORE...

Simply put, blockchain is a highly advanced transparent technology, a kind of ecosystem of computer codes that cannot be forged because they are spread over a multitude of servers (digital safes), where data can be stored, values can be exchanged and information can be transmitted without any control body. Clearly integrated in it: cryptocurrencies (virtual currencies), which came on the market in 2009, have now entered Wall Street and are growing exponentially worldwide (they include Bitcoin, Ethereum & Ripple, to name but a few), mainly because they provide anonymity of transactions, decentralization of currency control and convertibility into standard global currencies. To date, several "blockchains" (detached or not from the principle of cryptocurrency) are already in service in France and around the world:

- » Datatrust, which certifies individual identity documents (passports, diplomas, etc.) as well as company identity information (Siret, Kbis, etc.)
- » BlockVerify, which provides information on the traceability of luxury goods, sports goods, ready-to-wear clothing, electronics and pharmaceutical products
- » Loyyal, which combines loyalty points from many programmes
- » Gem, which provides information on virus circulation
- » Followmyvote, which guarantees incorruptible elections
- » Wittym, which analyses the natural and human interdependencies that are useful in the context of the European H2020 programme RESPONSE's positive energy neighbourhoods ("smart cities")¹

5. FLEXING OUR REFLECTING SKILLS - TREND 3



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... OR HOW TO TRANSFORM THE TOURISM INDUSTRY, ESPECIALLY IN THE MOUNTAINS?



To understand this recent phenomenon better, we can take the concrete example of Mr. Dupont, who does not live in France and who wants to spend New Year in one of Savoie's renowned ski resorts (editor's note: according to information from "Blockchain Partner" and adapted here to the "mountain" context): First of all, he books his flights on Fly Mountain and is simultaneously awarded loyalty points in the form of cryptocurrency, which he can use with all the members of the company's blockchain network (editor's note: this is referred to as the interoperability of the various programmes). Next, using the cryptocurrency he has been credited, M. Dupont books his accommodation in the usual way but without going through his bank and maybe not having to use a booking platform, using his loyalty points to reduce the total cost of his stay. Once at the airport, and after memorising his passport and a selfie via an identity certification app, he will be able to register his luggage independently and go through the health and immigration checks before arriving in the departure lounge. On arrival at his destination, realising that his plane was 30 minutes late, he will use his online insurance service which will immediately refund the compensation he is owed in this situation. He is then finally free to enjoy the comfort of the car and chalet

he has rented, using access cards he has easily retrieved (by sending a temporary and ultra-secure code to his smartphone) and the pleasures of the mountain. Indeed, thanks to an app proposed by the resort's tourist office, Mr. Dupont will be guided throughout his holiday: based on the needs and preferences he has put into the app beforehand - like buying his ski pass, a ski jacket or a pair of state-of-the-art skis, drinking a coffee or enjoying a delicious tartiflette with truffles for lunch, skating on a frozen lake, finding a babysitter so he can go on a snowshoe hike under the full moon... he will know where to go and how to use his cryptocurrency. What is more, in each shop/location he visits, he will be informed of any resort updates. He will be able to find out more about the traceability of the products and souvenirs that he wants to buy. He will also be asked to give his opinion on the sites he has visited. Before taking off for his next adventure, he will give back all or part of his remaining cryptocurrency, maybe even donating it to a local association committed to sustainable development.

5. FLEXING OUR REFLECTING SKILLS - TREND 3



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WHAT BENEFITS SHOULD WE KEEP IN MIND?

Well, you will have understood that: provided that each link in this incredible chain - consumers, businesses, authorities and governments - does not fear being ever more hyperconnected, the blockchain will become their new ally! This cutting-edge technology, which must remain at the service of people above all, is already an alternative means of payment to the best-known currencies and also keeps us informed in real time of the amounts in circulation so that we can keep them supplied accordingly (transaction rationalization). It also leads to fewer booking errors, especially for holidays and leisure activities and thus to greater flexibility, instinctiveness, speed, confidence and security. Digital and air traffic, in particular, are proving to be more fluid and effective. In addition, ethical consumption is becoming easier. Finally, this big data encourages a study of the habits of tourist populations (which resort, when, to do what, etc.) so that they come back (editor's note: encouraging customer loyalty costs less than acquiring new ones). All that remains now is not to underestimate the magnitude of the challenges to be taken up in order to move more widely from theory to practice - and to do so without damaging our societal (loss of the human link), economic (regalian functions of the state) and natural (digital pollution, carbon footprint) environments - and to have serious discussions at the regional, national, European and global levels about legislation and the related consents (via GDPR in particular), as well as the rates to charge for each piece of data exchanged...



If you want to find out more

- » www.economie.gouv.fr/entreprises/blockchain-definition-avantage-utilisation-application
- » blockchainfrance.net/decouvrir-la-blockchain/c-est-quoi-la-blockchain/
- » www.etourism.info/comment-la-blockchain-va-revolutionner-le-tourism/



¹ RESPONSE is a European project led by the towns of Dijon in France and Turku in Finland, bringing together 53 partners from 13 countries (2020-2025). The challenge is to deploy new technologies in order to create positive energy city blocks, i.e. ones that produce more energy than they consume.



TREND 4

ECONOMIC LOGIC

Global warming, the health crisis and the materialization of the concept of Corporate Social Responsibility are strong signals that could lead to a reinterpretation of the mountain resorts' current models and would allow for a smooth transition to the next stage...



ECONOMIC
LOGIC

The governance and business models of the North American ski resorts



Sylvain AUDET • Consultant in recreational tourism and lecturer in tourism, School of Management Sciences (ESG)/University of Quebec, Montreal (UQAM)

This article proposes an overview of the different types of governance and business models of ski resorts in North America.

THE ORGANISATION OF THE MOUNTAIN RESORTS

Currently, in industry and in universities, many analyses of ski resorts, mountain resorts and mountain destinations are looking at the offer and quality of the experience of skiers and snowboarders¹ and the impact of social networks on the attractiveness of the mountains.

According to Flagestad (2001)², the organisation of the mountain destinations is divided into two main models: the European model ("Community Model") and the North American model ("Corporate Model").

The European model, as we can see in the figure opposite, involves a multitude of participants, such as the commune, the resort manager, the equipment hire shops, the ski instructors, the restaurateurs, the accommodation providers and the tourist office. Each participant, according to their trade, their size and

type of governance, has different financial objectives. Coordinating the experience offer and the creation of value for visitors, skiers, snowboarders and non-skiers is the tourist office's responsibility, which must "accommodate" all the stakeholders with an attractive package.

The North American model, on the other hand, concentrates service provision and management of the mountain experience in the hands of a single company, whether large or small, private, non-profit, cooperative or public.

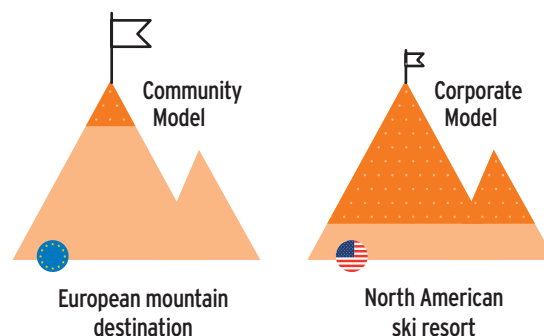
Structure of the mountain destination

Flagestad and Hope 2000

▬ Commune/municipality / tourist office

■ Ski lift operator

■ Related service providers



5. FLEXING OUR REFLECTING SKILLS - TREND 4



ECONOMIC
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In this situation, the resort owner or manager usually offers skiers and riders a single outlet for buying tickets, renting equipment, lessons and catering. Some resorts also offer the accommodation. These resorts manage the ski lift operation, groom the slopes, look after the lighting (if required) and safety (patrollers), as well as selling tickets and ski lessons, renting equipment and catering. We should mention that resorts often have to take a leadership role in the local tourism community by developing new mountain experiences (for winter and summer), packages (with hotel partners or complementary products) and joint marketing.

THE GOVERNANCE OF THE NORTH AMERICAN RESORTS

For each of these models, there are different forms of governance. When we talk about governance, we refer to the type of ownership (private, cooperative, non-profit or public), how decisions are made and to whom the company is accountable (the owner, the shareholders, its members, etc.). It is also important to mention that, regardless of the type of governance chosen, the management team plays a key role in implementing the owners' vision and by taking several operational decisions on a daily basis that have, amongst other things, an impact on the experience offered. Moreover, apart from the generally recognized legal obligations, resorts act autonomously and independently.

Private governance means that the business belongs to a person, a family, a group of people (shareholders) or another company. Decisions are made by a board of administration, whose members are chosen or elected by the owner or the shareholders. They make decisions according to the objectives set by the owner or the company shareholders and must periodically account for their decisions.

A cooperative³ is a voluntary association of members – workers, consumers, producers, or people with an interest in the objectives set – created to meet the needs expressed by them. It is an autonomous business separate from its members, its ownership is collective and power is exercised democratically. Typically, each member, regardless of their involvement, can elect the board members based on the principle of "one member, one vote". The board of administration operates as a private enterprise and must provide annual accounts at the members' general meeting.

A non-profit organisation (NPO)⁴, on the other hand, is a group of people – workers, consumers, producers or individuals – who are pursuing a goal of an altruistic nature and who do not intend to make financial gains to be shared among the members, as a private company or a cooperative would. Despite the notion of non-profit, the organisation can make profits, but they must be reinvested in the organisation or in another non-profit. The members elect a board of administration, which operates as a private company and must provide annual accounts at the members' general meeting.

The public structure refers to the different levels of government, whether it be municipal, regional, provincial ("State") or federal. The people elected by the population usually get a fixed mandate of four years. They must manage all of the services offered in a given territory and periodically report to the voters on their decisions.

5. FLEXING OUR REFLECTING SKILLS - TREND 4



ECONOMIC
LOGIC

NORTH AMERICAN RESORTS

Generally speaking, the business models of the North American resorts are based on three axes:

- » The "Ski destination" model
- » The "Snow school" model
- » The "Leisure activities" model



The ski destination model⁵ generally corresponds to the Corporate model presented by Flagestad at the beginning of this article, except that skiers and snowboarders cover several hundred kilometers and choose a stay of one night or more. Skiers or snowboarders therefore select a large resort (in terms of altitude difference, ski area, number of ski lifts, etc.). Apart from buying a ski pass, it should be possible to spend money on accommodation, restaurants, shops, rentals, etc., in or near the resort.

The ski destination model is primarily the preserve of private enterprise, as it involves a long-term development plan for the whole resort (lifts, ski area and snow-making, restaurants and bars, rentals, shops, summer activities and accommodation), a significant injection of private capital and government support, financial risk and a possible failure to achieve a return on investment.



The Snow School model⁵ is the one we usually find in North America. It primarily caters to a more local or regional clientele. Skiers or boarders go to a resort that is relatively close to home to practise their favourite snow sports, which implies that the outward journey, the day of activity and the return home can easily be done in one day. As the model's name indicates, these resorts host skiers and boarders who want to learn or develop their skiing or snowboarding skills.

The Snow School model groups two main types of properties or owners:

- » Private businesses;
- » Cooperatives of workers or users;
- » Nonprofit organisations (NPO). This latter category is again divided into three sub-groups:
 - Private clubs (e.g. : golf clubs) - for members only;
 - NPO - owned by workers but open to all;
 - Delegated management (owned by a municipality), but open to all.

As regards the private businesses in the Snow School model, apart from developing the accommodation and summer activities, they have similar financial aims as the destination resorts. They have to make their operations profitable within a four to five month period, unlike the destination resorts.

The business model of the private clubs in ski resorts resembles that of traditional private golf clubs, which we find everywhere in North America and that are only for members and their guests. We should mention that some clubs offer access to their ski area to non-members



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during less busy periods: during the week, for example, but at relatively high rates. These clubs operate on the basis of an entry fee and annual fees of several thousand dollars, which cover the basic services offered by the club (lift ticket and restauration), but not ski or snowboard lessons, the competition club or the bar. Another particularity of the private clubs is that if operations have not made a profit for any reason at the end of the season, the members must contribute "voluntarily" to the coffers to keep the club afloat, according to a pre-arranged agreement. The aim of these private ski resorts is to offer a very high-end ski experience (lifts, ski area, grooming, snow cover and services that are perfect in every way) to a select and very well-off clientele.



The cooperatives and nonprofit organisations have a business model that falls between the private business and leisure activity models. Indeed, several small ski resorts have developed over the years, offering their services to the whole local or regional ski and snowboard population, as well as serving their member-users or workers (cooperative). In theory, the general financial principle is to cover the costs of operation and maintenance. In practice, however, to ensure the sustainability of their resorts, managers must generate operating surpluses in order to create a fund reserved for the renewal of the equipment and infrastructures, just like private companies do.

Finally, delegated management consists of short-term resort management contracts, covering a single season to several years. These agreements are made between an NPO (created specifically for this purpose) and a municipality that owns the ski resort, the equipment and the buildings. Apart from the daily maintenance, these management agreements do not involve any major investment by the manager in the mountain equipment and infrastructures or in their annual maintenance or renewal. These are the municipa-

lity's responsibility via the annual equipment and infrastructure maintenance programme, its three-year investment plan and the different provincial and federal government subsidy programmes. These agreements have the advantage of entrusting the day-to-day management of a public asset to an entity that is separate and independent from the municipality. This manager does not have to deal with certain aspects that the municipality is forced to deal with, such as unionised employees.

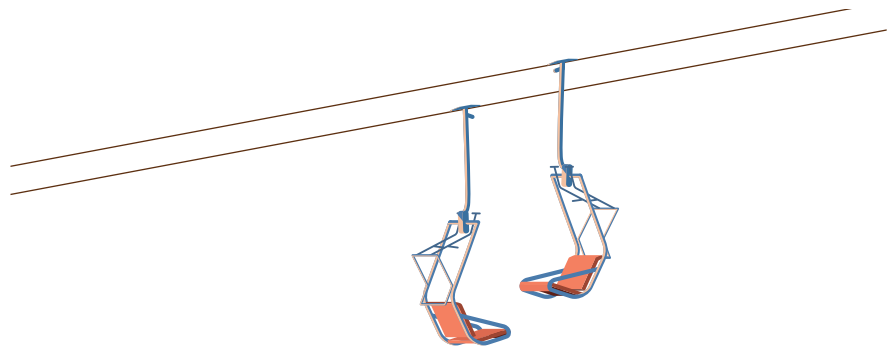


The Leisure Activity model⁶ is the same as all the other activities that a municipality offers its citizens: services to the community or municipal services, like a library, a swimming pool, tennis courts, snow clearing, waste collection, etc. The aim of municipalities with a mountain on their territory and who are owners of a resort is to respond to a need, without necessarily looking for profitability or return on investment. This type of resort has little flexibility for taking decisions rapidly when situations require it, like opening the resort to skiers and snowboarders early when there is early snowfall, or in the case of mechanical breakdowns. The final decisions are often taken by the municipal council, which meets on a fixed date (every fortnight or only once a month).

5. FLEXING OUR REFLECTING SKILLS - TREND 4



ECONOMIC LOGIC




THE BUSINESS MODELS AND TYPES OF GOVERNANCE OF THE NORTH AMERICAN RESORTS

The table below summarises the different combinations of business models and types of governance in North America.

As we can see, the "Snow School" model is the most widespread, as it meets a clear need, is easy to implement and requires fewer resources and less investment in infrastructure.

But whatever the business model or type of governance, resort managers will have to face 7 main challenges in the future:

Business models→ Governance↓	 Ski destination	 Snow school	 Leisure activities
Private	*	*	
Cooperative managed by:			
» workers		*	
» users		*	
Nonprofit organisation:			
» managed by the workers		*	
» managed by the users		*	
» for members only		*	
» delegated management		*	
Public			*

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ECONOMIC
LOGIC



The ageing of the population

Baby boomers, who used to be a significant core group of users, are reducing their number of annual outings or giving up the sport.



The disinterest of skiers or snowboarders

These former users have to be convinced to start practicing their sport again after their studies, having children, etc.



Renewing the clientele

With the departure of the baby boomers, the resorts must, and will have to, make a considerable effort to attract new skiers and snowboarders, mainly young people and member of cultural communities that have little connection with winter.



Replacing the ski lifts and snow making systems

With lifts that are at the end of their service life and energy-intensive snowmaking systems, managers must plan for significant investments. The question that they must ask is: where to start?



Managing energy costs

The fluctuation of energy costs in North America is a constant issue because of the considerable energy consumption of the ski lifts and snowmaking systems.



The fight against large groups

Aspen Skiing Company, Alterra Mountain Company, Vail Resorts, Mont Saint-Sauveur International, Resorts of the Canadian Rockies... : these groups offer multi-resort season tickets that attract part of the clientele of the smaller resorts to them.



Climate change

This causes higher temperatures and reduces the duration of the seasons and the water supply.

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THE MAIN CHALLENGES...

This article shows that whatever type of governance and business model is chosen, external events (Covid, late snowfall, significant thaw in the middle of the season, etc.) can directly affect resorts' capacity to offer skiing or snowboarding experiences that meet users' expectations.

In addition to this, an increase in the minimum wage, the implementation of a new collective agreement for station employees, or an increase in inflation or loan interest rates can put additional pressure on resort managers.

The sustainability of resorts, whether small or large, private, cooperative or nonprofit, depends on their managers' ability to deal with these different tasks and challenges.

Article adapted from S. Audet, F. Grandpré. & L. Botti (2019), *Ownership and business models of the resorts in eastern Canada* in Nicolas Peypoch's and Jacques Spindler's (dir.), "Winter tourism. What is the key to success and development for mountain communities?", p. 113 to 132, Harmattan - Grate collection. 244 p.

Our thanks go to Mr. Charles Blier, vice-chairman, Planning and Business Development/PNP Supply LLC - Alford Design Group and former chairman of the Quebec Ski Resort Association for his comments.

¹ Also called "snowboarders".

² Arvid Flagestad and Christine A. Hope, "Strategic Success in Winter Sports Destinations: A Sustainable Value Creation Perspective", *Tourism Management*, 22, 2001, p. 445 to 461.

³ Innovation, Sciences et Développement économique Canada www.ic.gc.ca/eic/site/106.nsf/fra/h_00073.html (adapted by Sylvain Audet, MBA), consulted in August 2021.

⁴ Quebec Business Registrar.

⁵ As defined in the context of studies ordered by the Quebec Ski Resort Association.

⁶ Typology proposed by Sylvain Audet, MBA (2021).



Sylvain AUDET - Quebec 

MBA - Consultant in recreational tourism

Lecturer in tourism, School of Management Science (ESG)/University of Quebec, Montreal (UQAM).

After holding various positions in tourism companies in the Eastern Townships (Quebec), Sylvain Audet has been working as a consultant in recreational tourism in Eastern Canada for over 25 years. He has developed extensive expertise in business development, benchmarking and business planning in the tourism sector and, more specifically, in the sector of snow sports.



ECONOMIC
LOGIC

Considering the transition of mountain tourism in terms of sustainable Business Models



Boris BOURGEL • Senior Lecturer in Management Sciences - IAE Savoie Mont Blanc/ IREGE Laboratory. Member of the IDO research team (Innovation and Development of Organisations) and co-founder and scientific coordinator of the Sustainable Tourism Research Chair.



Romain GANDIA • Senior Lecturer in Management Sciences - IAE Savoie Mont Blanc/ IREGE Laboratory. Member of the IDO research team (Innovation and Development of Organisations) and co-director of the IOPEN research chair (Open Innovation and Management 4.0 in the Digital Age).

The numerous societal challenges that face mountain tourism, amplified by the health crisis, are pushing resorts to question their current models in order to envisage the mountain tourism of tomorrow.

The transition must also be imagined in terms of sustainable Business Models.



With global warming, maturity of the ski market, new consumer behaviour, conflicts of use, etc., mountain tourism has been facing major economic, social and environmental challenges for several years. Amplified by the health crisis, these challenges have never weighed so heavily on the mountain resorts, plunging them into a sort of existential crisis and leading them to question the renewal of current models when envisaging tomorrow's mountain tourism.

This observation explicitly raises the question of the resorts' current and future Business Models (BM). It therefore seems pertinent, and even necessary, to also envisage the transition of mountain tourism in terms of BM and, more specifically, sustainable BM.

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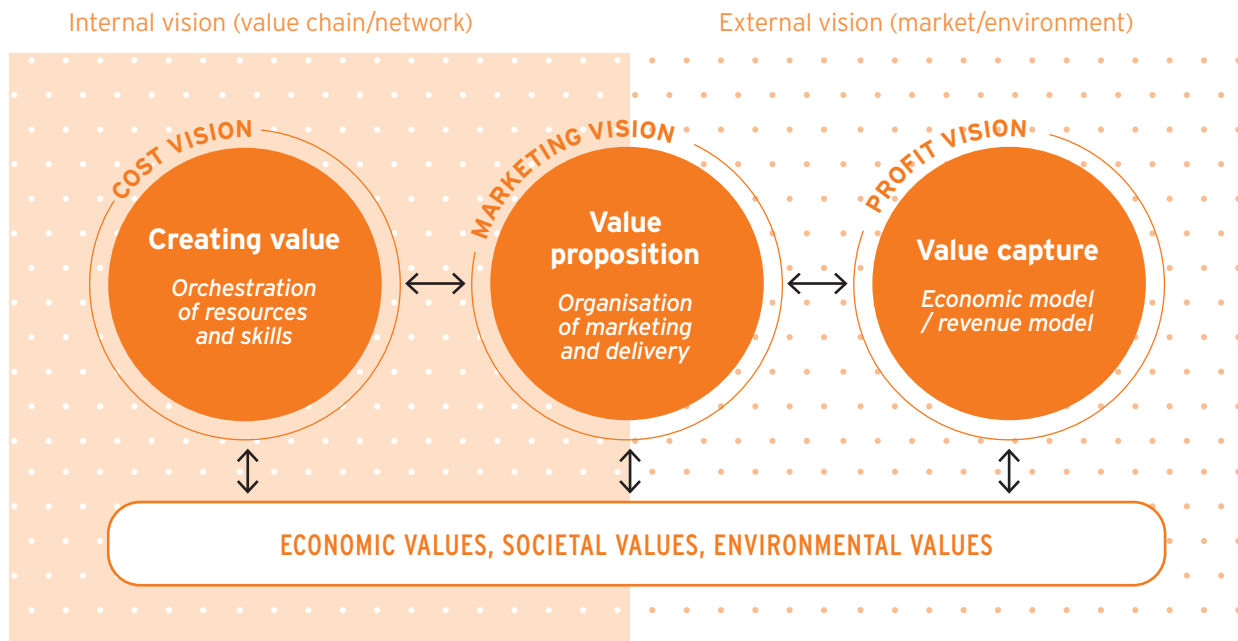
ECONOMIC
LOGIC

APPROACH TO SUSTAINABLE BUSINESS MODELS: WHAT ARE WE TALKING ABOUT?

In a first approach, a BM is a model for a strategy's conception and formalization, describing the way in which an organisation creates, proposes and captures value¹. Talking about a BM therefore comes down to talking about strategy based on the central notion of value and three key questions:

- » **Value architecture** What is the value created? Based on which resources, skills, activities and processes? Within which value chain and/or value network?
- » **Value proposal** Who is this value offered to? How is it marketed and delivered? How does it engage and satisfy consumers?
- » **Value capture** What level of revenue is generated? In what form?

We talk about sustainable BM when the principles of sustainable development are integrated into these three key questions of architecture, proposition and value capture. The difference is in terms of what value means; It is no longer just an economic value, but also a social and environmental value.



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INTEREST OF THE SUSTAINABLE BM APPROACH FOR MOUNTAIN TOURISM

Thanks to this broader concept of value, the notion of sustainable BM carries a strategic vision that combines a strong societal impact with long-term economic performance. The sustainable BM approach therefore has solid assets when considering the transition of mountain tourism.

Going beyond purely economic logic. Reasoning in terms of sustainable BM implies questioning the social value (job creation, local quality of life, etc.) and the environmental value (preservation of the fauna and flora, etc.) created over and above the sole economic value of tourism. This makes it possible to avoid the sort of "economic tropism" that mountain resorts sometimes suffer from, due in particular to a lack of shared references and diagnoses regarding their social and environmental issues².

Understanding the complexity and the specificities of each resort. In a logic of sustainable BM, a resort's tourism offer is not a whole, but a more or less coherent aggregation of several BM. Each of these is defined by one or several key activities, a specific seasonality and separate clienteles (e.g.: BM ski in winter and BM MTB in summer). This composite vision of the tourism offer makes it possible to understand each resort's situation whilst considering their specificities (number of separate BM, level of dependence on each BM, etc.), and avoiding the pitfall of the "one best way" applied to all resorts.

Identifying the role of the different stakeholders. The role of each tourism stakeholder can be discerned by questioning their contribution to the architecture, proposal and value capture of each BM. The benefit is twofold. On the one hand, it means that stakeholders who are not physically present in the territory are not forgotten (OTA, transporters, etc.). On the other hand, it brings to light potential imbalances, inconsistencies, dependencies or conflicts in stakeholder roles.



TAKING INSPIRATION FROM OTHER INDUSTRIES

Despite the interest of the approach, we have to observe that the notion of sustainable BMs and the associated tools and methods are still little used by leaders and managers in the tourism sector. In view of this, we propose taking a look at other industries and seeing how some organisations have successfully used these tools and methods to create and implement sustainable BMs.

Creating shared value in a territory's ecosystem: the case of the Pôle Ressourcerie du Chablais (Chablais Resource Cluster) in the social and solidarity economy³. The Pôle Recyclerie du Chablais, created in 2019, proposes a range of recycled products and items (textile, furniture, etc.) throughout the Chablais region (Haute-Savoie). Firstly, this cluster brings together the territory's stakeholders who are involved in the collection/sorting, reuse and manufacture of recycled items. Then, it also manages a 1500 sq.m concept store, a place where people can buy (shop), share, experiment (fab lab workshop) and socialize (café). In fact, the Pôle Recyclerie is a perfect example of a sustainable BM built on the scale of a whole territory. The mountain resorts could take inspiration from it on two levels:

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- » The creation of "shared value": Value that is economic (sale of items), social (sharing, exchange, socialising) and environmental (recycling), aimed at several groups of stakeholders (consumers, inhabitants, those involved in the project...);
- » The coordination mechanisms between the stakeholders (collegiate governance, central third place of the concept store...) on which the BM is based at the territorial level.

Building and steering a portfolio of coherent BM: the case of Ankama in transmedia⁴. Ankama is a French company developing and distributing digital and artistic content. It proposes a range of "puzzle" products on a main medium (video games) and secondary media (animated series, manga, etc.), with the particularity of being part of a unique artistic and narrative universe. Ankara's range of products is therefore similar to a portfolio of BM (one BM for each medium), organised as follows: the video game BM is at the heart of the offer and the BM of the other media are complementary and designed to strengthen and prolong the experience of the video game BM. The mountain resorts, whose offer is also similar to a BM portfolio, could take inspiration from the way that Ankama has built up its BM portfolio, by maximising the synergies between the central BM (video game) and the secondary BM (other media), that supply and strengthen the central BM through a global narrative.

Giving the customer an active role in creating value: the case of Trackmania in online video games⁵. Trackmania is an online car racing game developed by French company Nadéo, which has a community of several million users. Its success relies on the involvement of the most active members through two roles: The "creators" (e.g.: creating new circuits) and the "organisers" (e.g.: organising competitions). Thanks to them, Trackmania can propose over 5 million circuits and continuous competitions organised worldwide, helping to strengthen the game's attractiveness for all the other members of the community. The mountain resorts, some of which already have "ambassador" programmes, could take inspiration from the way that Trackmania has succeeded in opening its BM to certain users and getting them to participate actively in the creation of value to strengthen its value proposition for its entire community.

1 Teece D.J. (2010). *Business Models, Business Strategy and Innovation, Long Range Planning*, 43, p. 172-194.

2 Bourgel, B. (2018). *The management of societal performance by mountain resorts: a stakeholder approach*, PhD thesis. Grenoble Alpes University.

3 <https://www.recyclerie-chablais.org/>

4 Gandia, R., & Brion, S. (2016). *How to Avoid Dependence in the Videogame Industry: The Case of Ankama*. *International Journal of Arts Management*, 26-41.

5 Parmentier, G., & Gandia, R. (2013). *Managing Sustainable Innovation with a User Community Toolkit: The Case of the Video Game Trackmania*. *Creativity and Innovation Management*, 22(2), 195-208.

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ECONOMIC
LOGIC



SUSTAINABLE TOURISM CHAIR

The Sustainable Tourism research chair supported by the USMB Foundation (Savoie Mont Blanc University) is a research program that aims to contribute to the transition of mountain territories towards sustainable tourism, in a rationale of connecting University, Companies and Territory. More specifically, the Sustainable Tourism chair aims to provide those involved in mountain tourism with knowledge, tools and methods to approach this transition in terms of sustainable business models.

The work carried out is based on three lines of research:



Diagnostic



**Emergence of new
sustainable Business
Models**



**Orchestration
and Acceptability**

and will rely on two main networks of partners:

- » An academic network of researchers and institutions with expertise in tourism transition issues, with whom collaborations will be initiated.
- » A network of pilot resorts, invested or wanting to invest in a more sustainable tourism, with which experimental work will be undertaken.

The Sustainable Tourism chair is currently in the prefiguration phase and will start its operational phase in the summer of 2022 for a period of three years, during which time many events (field days, master classes, seminars, etc.) and deliverables (press articles, scientific articles, guides/ official reports, etc.) will be proposed to those involved in mountain tourism.



**Institut pour
la recherche**

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ECONOMIC
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Boris BOURGEL - France

Boris Bourgel is a lecturer at the University of Savoie Mont Blanc and a permanent researcher at the IREGE laboratory. He is the author of a thesis on the social performance of mountain resorts. His research is applied to the mountain tourism sector and focuses on the themes of Corporate Social Responsibility, Corporate Social Performance and Sustainable Business Models. He is particularly interested in the conditions of emergence and the implementation of new sustainable business models by mountain resorts. He is the co-founder and current scientific coordinator of the Sustainable Tourism research chair supported by the USMB Foundation.



Romain GANDIA - France

Romain Gandia is a lecturer at the University of Savoie Mont Blanc and a permanent researcher at the IREGE laboratory. He holds a PhD in management sciences (specialising in innovation management) and conducts research on the new strategic and organisational behaviours of innovative SMEs in the cultural and digital industries. He is particularly interested in the development of digital business models and multi-sided platforms. He is currently co-director of the Open Innovation and Management 4.0 in the Digital Age chair (IOPEN).





TREND 5

ENVIRONMENT, AN ALLY TO RESPECT

Nature is the primary asset of the mountain resorts, something that is so obvious that we had perhaps forgotten it. Enhancing the services provided by the natural areas and integrating them into a business model is one of the ways forward, a vision... to help us regain our sight.



Vigilance regarding water in the mountains



Marion DOUARCHE • Geographer and director of the research and design department at Ciméo, a mountain water agency

Part of the mountain tourism economy is based on water (white gold, blue gold), how will this work in a context of climate change?

PREAMBLE

Little 1. We talk about tourism based on water as one of the components of the mountain areas: ski and artificial snow, of course, as well as water that contributes to the standing of tourist accommodation (spas and swimming pools that are increasingly private, rather than shared, and therefore more numerous), white water sports, leisure swimming lakes, cultural excursion sites and grandiose landscapes (lakes, waterfalls, canals, etc.). In other words, water as a resource that we take, consume and pollute, water as a medium and material for immersion, and water as a postcard, part of an attractive landscape.

Little 2. According to IPCC reports¹, since 1900, climate change, which can no longer be contested today, has resulted in a rise in average temperature of +2°C across the whole of the Alps and in precipitation in volumes comparable to those of today, but distributed differently over the year and with very variable frequency and intensity, i.e. a very wide-ranging variability of weather conditions. At this rate, if we look forward 30 years, we can observe a melting of the glaciers which feed most of the mountain rivers (Alpine glaciers already cover 30% less surface area since the 1980s and the phenomenon has accelerated considerably over the last three years, as mountaineers will confirm). All rivers will change their hydrological regime from glacio-nival to nivo-pluvial and from nival to pluvial depending on their catchment area (altitude, orientation, glacial or non-glacial supply); flood

periods will move forward by a good month, but flood episodes will also be harder to predict: it could rain in January and freeze in July. The flows of rivers fed by the glaciers will significantly increase from April (until now mid-June). Among these melting glaciers, there are the rocky glaciers, whose volumes of ice and the quantity of water that they represent are still not well known. In catchment areas without glaciers, on the other hand, we are already seeing a drop in average regimes (-30% since the 1980s and -40% over the next 20 years)². The warming of the lakes (+1°C already observed over the past 30 years) leads to greater evaporation and biological change, which can lead to their vegetalisation and a reduction of their surface area (becoming boggy, then drying out). We also see the drying up of some springs, as well as a decrease in the fodder value of the alpine pastures in the Southern Alps and even on some of the Northern Alps (where they are usually better watered). This reduction in altitude water stocks will have an impact on the water resource available, whether it is used for drinking water or for other economic uses (with less snow and melting glaciers, precipitation runs off more rapidly to the valleys, the aquifers³ at the basin head have a low capacity).

5. FLEXING OUR REFLECTING SKILLS - TREND 5

INCREASING DEMAND

At the same time, the demand for water is changing, usually increasing. It is true that drinking water withdrawals are now better known and can be reduced by repairing the (many) leaks, thanks in particular to the persistent work of the Water Agency, which makes subsidies conditional on the knowledge and state of the networks. In the tourist areas, however, the ratios are always high, since (drinking) water contributes to the standing of accommodation (every new chalet or residence has its own private spa or Nordic bath facility). As for the ski resorts, they are aiming for a snow viability index of 75%⁴, which increasingly implies using artificial snow when there is a lack of natural snow (+17% water for artificial snow in Savoie between 2018 and 2019; x3 between 2000 and 2020 and x1.5 from 2020 to 2025 for the Isère resorts⁵...). The demand for water is highest during the winter low-water period. If the resource decreases, tensions could arise.

In summer, the principle of "no water, no leisure" is still as valid as ever: all tourist promotion documents are based on water, sometimes bordering on the paradoxical, when they underline the vulnerability of the aquatic environments they are promoting... (a bivouac near a lake, aquatic hiking). As for white water sports on rivers used for hydro-electricity, for several years they have had to make do with "water (release) days", when the manager has to manage his diminishing energy resource carefully... Several hydroelectric projects have already been scaled back or postponed, due to the lack of a guarantee of the resource to be used.

"Water requirements, whether as a resource, a support for activities or a landscape, will have to cope with hazards and diminishing stocks."

To sum up the diagnosis and trends: certain mountain areas will evolve with rivers that are very full from the beginning of spring, whilst in other areas, the rivers will progressively diminish overall and the basin heads will dry up. When the majority of the Alpine glaciers have disappeared, all of the water towers will become increasingly dry. There is a slight nuance however: higher growth of the forest (due to global warming) could in some places encourage the development of soils that act as a sponge, but this will not be sufficient to compensate for the lack of storage that is currently provided by snow and glaciers. The demand for water, whether as a resource, a medium for activities or a landscape, will have to deal with hazards and diminishing stocks.



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ENVIRONMENT



WHAT ADAPTATIONS ARE REQUIRED?

How can mountain businesses, and more specifically those in the tourism sector, adapt to these new conditions? For we are no longer saying "how can they anticipate them?" since the change has already taken place!

The communities and private players in the mountain territories have already turned the corner in recent years, by becoming or remaining welcoming holiday resorts, whatever the weather conditions: cool in summer (we go there to escape the heat waves in the valleys), romantic in autumn, a real change of scenery in winter, with or without snow, giving the impression of being in another world... Very recently, the government's "Avenir Montagnes" plan, accompanying the post-Covid revival of the mountain tourist economy, underlined the fact that its economic model has been destabilised by climate change and that it is confronted with a number of environmental problems, including that of water management...

In order to adapt better, it is essential to have a better understanding of water issues at the level of basins or even sub-basins: what is the resource, how is it available? What is the demand, how will it increase? How can it be reduced (by repairing networks, multiple uses)? What are the territory's water-related issues? The territories that have programming tools, such as water development and management plans, have this advantage: stu-

"To adapt better, it is essential to have a better understanding of water issues at the sub-catchment level. Just think of the reactivity and confidence in the future that we could have with better knowledge."

dies of withdrawable volumes are carried out, with the implementation of river contracts financing work aimed at reducing withdrawals and the training, of elected officials in particular...⁶ On a regional scale and in certain departments, politicians are concerned about knowledge and anticipation. Many other territories, however, do not have the means to understand and prepare the required developments in water-related practices in the context of climate change and its impact on mountain activities. Yet this is a major challenge: Imagine the reactivity and confidence in the future that we could have with greater knowledge!

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ENVIRONMENT

A NATIONAL WATER DATA SCHEME IS CURRENTLY BEING DRAWN UP

Companies can contribute in a variety of ways: by innovating and contributing to better knowledge, in partnership with researchers and other observers, by developing technologies and processes that make it possible to monitor the rapid evolutions of the climate, the glaciers and temperatures, as well as structures and networks... through complex or pragmatic monitoring. They innovate in a variety of fields, particularly in water treatment. Technological improvements allow for better observation, real prospective work, which is then no longer based only on models (and their limits of reliability). They initiate changes in practices, no longer following the trend, but provoking it. The time when consumers, with their "non eco-friendly" attitude, had to be respected on the pretext that they were on holiday is now over. Today, they are helped to make eco-responsible choices and to be proud of them. They provide support for scientists and decision-makers. They allow them to be more responsive in a context where we know that we know less and less!

By understanding more, taking less and polluting less, water will continue to be a lever for attracting tourists to the mountains!



Marion DOUARCHE - France



Marion assists mountain territories in their development projects, particularly with regard to water management. By combining different approaches (geographical, environmental, technical, hydraulic, economic, urban, social, etc.), she proposes a global and long-term vision. Her work anticipates climate change and the necessary adaptations for living mountain territories that are inhabited year round, at the interface between the precise and conceptual world of research and the active world of decision-makers who are in touch with reality.

¹ The Intergovernmental Panel on Climate Change is a body open to all UN member countries. Created in 1988 to provide comprehensive assessments of the state of scientific, technical and socio-economic knowledge of climate change, its causes, potential repercussions and coping strategies, it currently numbers 195 States.

² Source Les Ecrins national park.

³ A ground-water supply that is more or less accessible, mostly at springs, using gravity.

⁴ 75 % of the surface area of the ski area has natural or artificial snow cover groomed to a depth of 20 cm.

⁵ Data for departments 73 and 38.

⁶ The Verdon Regional Nature Park trains the communes' elected officials in water saving in public buildings, for example.



How can the services provided by the mountain's natural spaces be enhanced?



Thibault DAUDIGEOS • Frédéric BALLY • Michele COLETTI • Marie MICOL

Lecturer-researchers, Grenoble School of Management (GEM)

The health and environmental crises that we are going through seem to have accelerated awareness that the natural spaces in the Alps have more to offer than just the slopes for winter sports or the production of hydroelectricity. Wide open spaces, pure air, lower temperatures in summer, quality local food production, refuges for biodiversity..., the mountains have a thousand virtues and the range of services offered to the greatest number has been extended.

But it is also a victim of its own success: pressure on land is strong, uses are intensifying and are concentrated on certain destinations, threatening the green belts around mountain towns. So we have to question the economic value of the services provided by these green infrastructures (network made up of quality natural and semi-natural areas, such as woods, orchards, marshes, meadows, waterways, etc.), which is sometimes difficult to take into account in planning decisions or simply generating income and jobs.



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ENVIRONMENT

ECOSYSTEM SERVICES: A FRAMEWORK FOR CONSIDERING THE SERVICES PROVIDED BY NATURAL SPACES

For almost 20 years, ecologists and economists have proposed the framework of ecosystem services as a way of considering the services provided by nature to man. They distinguish four main types of services:

- » Supply **services** are the easiest to understand and value. These cover, for example, the provision of food, fuel or medicinal molecules from nature.
- » **Regulating services** provide benefits that are less tangible, but nonetheless quite necessary to our daily life, such as pollination or the regulation of the climate, urban pollution and floods. Nowadays, these services are affected by human activities and priority is given to supply services.
- » The **socio-cultural services** are immaterial and cover the aesthetic, recreational, spiritual or well-being benefits that humans derive from their interaction with nature. The mountain has long been generating income from these amenities and the current environmental crisis is giving them even greater value.
- » Lastly, the **supporting services** are the fundamental services that ensure the correct functioning of the biosphere and that are therefore necessary for all other ecosystem services, directly or indirectly. For example, it is the hydrological cycle through which surface water evaporates and is released as rain or snow on our mountains.



"Thinking about the business models of the green infrastructures going around and through the mountain towns has to be a collective multi-player approach, which allows a shared vision to be developed between the project's different stakeholders."

The challenge of getting these ecosystem services recognised and assessed is twofold. Firstly, competition between services must be avoided: for example, by favouring a production-oriented supply to the detriment of other services with less direct benefits. Next, and above all, it is a matter of avoiding competition with other uses in the territory, which are gradually causing these green infrastructures to disappear, particularly near urban centres.

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ENVIRONMENT

"Since 2019, the Low Carbon Label (created by the Ministry of Ecological Transition) awards virtuous agricultural or forestry practices carbon credits that can be exchanged for cash, for example in local carbon compensation cooperatives, or via the actions of the National Centre for Land Ownership (CNPF)."

BUSINESS MODEL INNOVATIONS TO ENHANCE THE ECOSYSTEM SERVICES

Real progress has been made over the past few years on measuring and mapping ecosystem services, and the sharp decline of green infrastructures is now well documented in all mountain regions¹. According to a study by Agreste Primeur, the Agriculture Ministry's statistics department, we know for example that France lost 20% of its orchards during the period 2000-2010.

On the other hand, the integration of these green infrastructures into the economic circuits still seems to be in its infancy. To the point that many people who used to encourage the concept of ecosystem services are now highlighting the limits of their economic valuation and advocating strict protection measures for the green spaces around the mountain towns, where they are the most threatened.

However, in the field, a number of initiatives are experimenting with innovative business models to enhance the services provided by these green infrastructures. Considering these business model innovations collectively is required to increase their protection.

A business model is a conceptual tool that describes both:

- » The value that a business can offer customers or stakeholders;
- » The activities of the business and its economic partners, which allow the creation of this value;
- » Lastly, the mechanisms that generate a stable and profitable revenue stream.

Thinking about the business models of the green infrastructures that go around and through the mountain towns therefore has to be a multi-player collective process, which allows the development of a vision shared by the project's different stakeholders, even if we realise together that sometimes there are no simple economic models to implement and that public support is necessary.



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ENVIRONMENT

AN OPPORTUNITY FOR SHORT CIRCUITS

The most marked trend is the enhancing of the green belt supply services. We are seeing the development of short food circuits, which highlight the production of orchards and peri-urban fields. To increase the added value produced, processing companies are also developing their offer with products based on local natural resources (bread, jam, fruit juice, ice cream, soap, cosmetics, etc.).

The second basic trend is the highlighting of the mountain areas' cultural services, in particular wellness and beauty treatments. Marketing concepts are multiplying to attract new clientele segments. This is the case of the "forest therapy" offer, for example, which Slovenia hopes to use to become a popular destination.

But it is still very difficult to enhance regulation and support services. Yet this is where innovations are the most needed. We can take, for example, the case of hedgerows, which have been steadily decreasing for the past 70 years, even though their impact on biodiversity preservation and the regulation of agricultural pests and diseases is now widely proven. Hedgerows are being torn down because they run counter to the mechanization of farming practices, which requires large areas to be profitable. So how can value be generated from these hedges? Some people advocate developing their supply service by planting fruit hedges (red fruits for example) and creating circuits to recycle the products of pruning as urban firewood. Others are organizing workshops with farmers to raise their awareness of the positive impact of hedges on their yield: fewer pests and diseases, protection against wind and run-off, etc.

Finally, in the face of difficulty, a way of saving the hedges could come from implementing more complex business models, where the payers and beneficiaries are not necessarily the same people. Since 2019, the Low-Carbon label (created by the Ministry of Ecological Transition) has allowed virtuous agricultural or forestry practices to obtain carbon credits that can be exchanged for cash, for example in local carbon compensation cooperatives or through the actions of the Centre National de la Propriété Foncière (CNPF - the National Centre for Land Property). In this way, the restoration of hedgerows could be financed not by farmers, but by stakeholders who benefit very indirectly from their ecosystem services.



GREEN INFRASTRUCTURE GOES BUSINESS AWARD!

In the framework of the French presidency of SUERA (European Union Strategy for the Alpine Region), a prize has just been launched to reward business model innovations to better manage or restore green infrastructures in the Alps. Projects of different levels of maturity can compete for the award, ranging from a simple innovative idea to a new offer from an established company.

To find out more: www.gi-goes-business.eu

1 For example, scientific work shows that hedgerows have diminished by 70 % in France since the 1950s and are continuing to do so by 8000 km per year. We also know that orchards have declined dramatically. For example, the number of fruit trees in the Swiss canton of Grisons has been reduced by a factor of 6 since the 1950s.

5. FLEXING OUR REFLECTING SKILLS - TREND 5



ENVIRONMENT



Thibault DAUDIGEOS - France 

Professor of management at Grenoble's School of Management and coordinator of the Territories in Transition research and teaching chair. His work focuses on the emergence of new organisation models that integrate the challenges of sustainability in economic activities. He directs a research programme on how the platform economy can serve the ecological and solidarity-based transition of territories.



Frédéric BALLY - France 

Post-doctoral researcher at Grenoble's School of Management in the Territories in Transition chair. Formerly a consultant at the OECD in the evaluation of research infrastructures, he holds a PhD in sociology. His research focuses on the links between groups of local inhabitants and the enhancement of nature.



Marie MICOL - France 

Political science, international trade, impact investing, charities...: Marie Micol took several detours before finding her passion for the environment. With her complementary experiences as a consultant for the management of protected areas and the coordination of their actions, she brings a holistic vision and a fresh view.



Michele COLETTI - France 

An Associate Professor of Innovation at Grenoble's School of Management, with a background in consulting for private companies and public administrations, Michele Coletti obtained a PhD in Management Sciences at Milan Politecnico in Italy. He is the coordinator of the European LUIGI project: Linking Urban and Inner-Alpine Green Infrastructures - Multifunctional Ecosystem Services for more liveable territories.

6. INTERNATIONAL (SPACE) STATION



INTERNATIONAL
SPACE
STATION

6. INTERNATIONAL (SPACE) STATION



5 interviews with international experts observing other mountain territories.



Take off! What if we were to climb so high that we were in space? From here, we can see our beautiful "Mountain Planet" and observe... What is happening in the international Cluster Montagne network? Challenges, pandemic management, business models, ecological transition: our experts give us their feedback and their view on these questions.



James ACKERSON

Corralco resort

Chile



"In the future, a control of customer flow will probably be introduced to focus on quality..."

His view of the ski industry in Chile – and of skiing in general – goes beyond the borders of the resort he is currently managing in Corralco, near Lonquimay volcano: 28.5 kms of runs and 6 ski lifts in the heart of the Araucania region, one of Chile's jewels.

James Ackerson acquired this experience ski instructing in Vermont (USA), then in Portillo (Chili) for ten years and then during a further ten years as director of the same school. He continued his professional career marketing Valle Nevado, a Chile resort, which he then ran a few years later.

Today, as well as running the Corralco site, James Ackerson chairs ACESKI, an association that brings together the players of the Chilean mountain industry, which encourages collaboration to promote the tourist destinations. Tourism represents a significant part of the Chilean economy.

6. INTERNATIONAL (SPACE) STATION



Reto GURTNER

Weisse Arena Group

"The post-crisis era will be different..."



The Weisse Arena group includes a ski lift company, hotel and gastronomic activities, a sports equipment sales and rental company, a ski, snowboard and mountain biking school and a management company, in the Swiss region of Grisons. Weisse Arena also markets the Flims Laax Falera destination. The overall leisure offer is positioned and marketed year round under the brands Flims and LAAX.

The group achieves net turnover of 97 million Swiss francs, employs 1130 staff during the winter season and 233 staff during the summer season. With 224 km of ski runs, the destination sells a million ski-days every season.

Born in 1954 in the Flims region and immersed in the world of mountain tourism since his childhood, Reto Gurtner has followed in the footsteps of his father, Walter Gurtner, a visionary and the founder of the ski resort of Laax (Grisons) in the 1960s.

He is currently the director of Weisse Arena, an integrated services group in the tourism and leisure industry. His goal? To offer a wide range of experiences in the Alpine leisure sector, particularly through operation of the Swiss resort of Laax, which positions itself as a pioneer in the field of sustainability.

6. INTERNATIONAL (SPACE) STATION



María José RIENDA CONTRERAS

High Council for Sport 2018-2020

Sierra Nevada resort



Spain

"We can no longer develop as a ski resort, but we know that there are possibilities as a mountain destination."

Those who are familiar with competitive alpine skiing will have heard of María José Rienda Contreras. The Granada-born skier is a six-time World Cup winner - in giant slalom - and has also represented Spain at five Winter Olympics. After retiring from the competition circuit, she became involved in sport management in her country. She was appointed President of the High Council for Sport by the Spanish government from June 2018 to January 2020.



6. INTERNATIONAL (SPACE) STATION



Kenta TAKAMORI

Hakuba 47 resort



Born in New York to American parents, Kenta Takamori has loved skiing since he was a child. His passion led him to buy Hakuba 47, a reputed Japanese ski resort in Nagano prefecture.

Based in San Francisco, Kenta Takamori is also the founder of Goodvest, an online advisor that helps clients make investments while maintaining their values. Kenta has extensive experience in global financial markets, including, amongst others, stints at Goldman Sachs and JP Morgan.

"Japan is known as a summer destination, but it would gain from enhancing the winter season..."

6. INTERNATIONAL (SPACE) STATION



Irakli TCHIRAKADZE

M.R.D.C

"Visitor numbers to our sites are increasing significantly, up 20 % in Gudauri, for example..."



Mountain Resorts Development Company Ltd (M.R.D.C), now the Mountain Trails Agency (M.T.A), was founded in 2013 by the State Property Agency (LEPL), subordinate to the Georgia Department of Economics and Sustainable Development. The company operated under the name of Gudauri Development Agency Ltd until 2014. By decision of the Ministry, management of the Bakuriani-Didveli and Goderdzi resorts was transferred to M.T.A in 2014 and 2015 respectively. Since 2017, the group has therefore been managing the resorts of Gudauri, Bakuriani (Kokhta, Mitarbi, Didveli), Goderdzi, Hatsvali and Tetnuldi (Mestia).

Irakli Tchirakadze started with the company in 2013 as assistant director, when M.R.D.C was only managing Gudauri resort. He also worked for Doppelmayr for two years as project manager. He came back to M.R.D.C at the beginning of 2020, at the request of the Georgian Ministry of Economy, to take the position of director.





QUESTION #1

**Leisure activities, winter sports and tourism in a broader sense is a sector that is constantly changing. For you, what are the challenges linked to your development in the medium or long term?
Can you point out the main challenges that will guide your next projects?**



Irakli TCHIRAKADZE - Georgia

Our challenges in the very short term are hosting and organising the Freestyle World Championships in 2023. To carry out these projects successfully, we need to develop a number of new infrastructures.

These challenges meet a strategic objective of developing our international positioning. We have assets, such as cultural attractions and markers and the fact that we are very cheap compared to the Alpine resorts.

The customers in our resorts are mainly domestic (40% Georgian visitors) and regional (Eastern Europe, Russia...).

The organisation of international events is one of our levers for development and European visitors in particular (from Germany, Austria, etc.) are coming more and more. However, this means that our resorts have to meet international standards. To do this, our collaboration with French experts and with the Compagnie des Alpes in particular, is precious.

Sharing experience and our regular visits to the French resorts allow us to reflect and make decisions about our development.



The number of visitors to our sites is growing significantly overall (e.g. up 20% at Gudauri, the country's largest resort). We therefore have the challenge of managing this growth. We need to adapt and develop our infrastructures and equipment, and major investments have been made in recent years, particularly in terms of making ski areas safer. In Mestia, for example, the challenge is to modernise the resort and several new lifts are planned.

6. INTERNATIONAL (SPACE) STATION



QUESTION #1



James ACKERSON - Chile

I believe that climate change is at the top of the list of challenges. In Chile, four major ski resorts are located around Santiago and three of them have suffered from the lack of snow in the past four years.

It is a very localised warming linked to the economic and industrial development of Santiago. Air pollution in the capital and the challenge of reducing the environmental impact are real issues.

In other parts of the country, the impact is less significant, but the scientific predictions are there. Other resorts like Chillan or Corralco will also be affected by global warming.

Winter 2021 was once again complicated for our resorts, especially the ones located around Santiago. In Corralco, we opened for 85 days and the resort closed on October 18, which is not really so terrible considering the lack of snow.

Another challenge: the technological tools, a need that has been accelerated by the crisis, especially when we know that the Chilean industry has been slower to acquire these tools than other countries. I am a great believer in data mining¹ which should offer us better knowledge of our customers. I also think that, in the future, we will probably have to introduce a control of customer flows to focus on quality over quantity.

Improving customer mobility will also be a priority. We are seeing sustained traffic, which can be almost unbearable, as it is very intense at certain times. This highlights the gaps in the transport system from the towns to the resorts.

Lastly, we maybe need to temper the elitist nature of skiing in Chile: as long as not even one percent of the Chilean population skis, we can say that we have room to grow!



Reto GURTNER - Switzerland

First and foremost, I am persuaded that the post-crisis era will be different. The model of our destinations is really going to have to change. Elements like social distancing will be long-term: mass tourism and over-tourism is over. I am convinced that people will always want to travel more, but they will not want to be just "tourists".

The following question is important: how can we change a holiday site into a place to live? How can we create an offer where people will come for more than just leisure activities during their holidays?

We have been testing the "workation"² concept for a long time in Laax: why can't people who live in cities work in the mountains? Today, we are really questioning our way of working.

A "workation" can be a key and one of the solutions to the problem of occupancy rates of only 20% over the year in our tourist accommodation (out of 10,000 locations with a value of 6 billion euros). We have the same problem of "cold beds" as in the other Alpine resorts. Why not make better use of all this existing accommodation, particularly through the "workation" concept?

Nowadays, the resorts must be open more than 300 days a year and their offer must go beyond the model of the ski lifts. Customers must feel "at home" and have access to a daily activity offer. To achieve this, we need to work on the range of leisure, shopping and mobility services available.

These new populations, between tourists and permanent residents, must be able to fully integrate with the locals: This means changing the culture of the latter and their perception of tourists. Communication is a crucial point here.

It is not a question of price: a price war starts when everyone is offering the same thing.

Mobility in the mountains is also a real question. We need to reinvent it, combine the philosophy of Tesla³ and that of the mountain in mobility and lifts.

6. INTERNATIONAL (SPACE) STATION



QUESTION #1

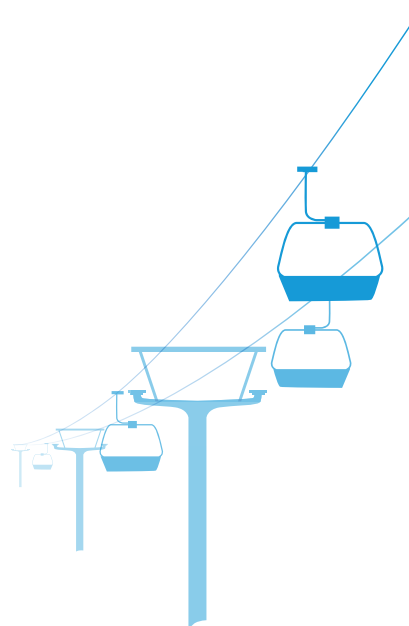
Why would it not be possible to import the principle of lifts and transport that we find in the urban world into the mountains? Simplifying, ensuring comfort, using the technologies of machine autonomy. The ideas and concepts already exist elsewhere. Today, the questions are defined: what can we change? How can we create value?

It is now that we have to review the business model of the mountain resorts. We have a huge potential if we combine and use all our assets, from people's aspiration to nature, well-being and physical activity, disconnection, scene... Ski resorts are a necessity and a base, but this is no longer enough. We have to offer more to get people to come, especially facilitating the customer journey and really engaging in digital transformation and automation. The younger generations today are used to this and have the associated codes.

How can we reduce the complexities and frictions of the customer journey in our territories? How can we connect everything? It is no longer possible to envisage having to book at a counter and queue up at ski schools, or to maintain inflexible holiday dates. We have to think about the offer for customers and for families, who are the resorts' main clientele.

The challenge is that we have a lot of independent and fragmented players in the resorts. So the question arises: how can we create a complete and connected experience between all the links in the chain in this situation? Let's think about the future: what will the needs of future generations be?

In any case, I remain resolutely optimistic and positive for our mountain tourism sector.



1 Data mining is the process of analysing massive volumes of data and Big Data from different angles, in order to identify relationships between the data and transform them into usable information. This system is part of the Business Intelligence framework and aims to help companies solve problems, mitigate risks and identify and seize new business opportunities.

2 The "Workation" (or teletravel), a contraction of work and vacation, is a concept born in the United States. Over the past ten years, some of the people who work away from an office have decided to go away for a while to enjoy a change of scenery while continuing to do their job.

3 Tesla's philosophy is to accelerate the global transition to a sustainable energy path. Tesla builds not only all-electric vehicles, but also scalable clean energy generation and storage products. Source: www.tesla.com

6. INTERNATIONAL (SPACE) STATION



QUESTION #2

QUESTION #2

The pandemic we are currently living through is unprecedented, but it has been managed differently in different cultures and regions of the world. What impact has it had on your activity? What has been your strategy for managing this situation?



Irakli TCHIRAKADZE - Georgia

The impact and management of the crisis have also been very difficult in the Georgian resorts, like they have in all the ski nations.

Our revenue has been impacted, as has that of the private local players in our different sites. The Georgian government has given the sector financial aid, of course.

During the winter season 2020/21, we were able to open our sites for a few months, from the end of February to the end of the season. Our resorts stayed open for the summer season in 2020 and 2021.

Like everyone, we had put a specific operation plan in place: social distancing, reduced capacity and disinfection of the lifts, taking skiers' temperature, etc.



James ACKERSON - Chile

I had never worked so hard with the different authorities in Chile, because we had to show that we were capable of opening during the pandemic.

In the end, over the winter season 2020, three ski resorts were allowed to open for 51 days after working on a very strict protocol for the restaurants, the ski area, recruiting, distancing in lift queues, etc.

It was very complicated, but nonetheless it taught us some things, such as spreading visitor numbers over the week.



Reto GURTNER - Switzerland

We were moving towards a record season 2019/20, but the crisis cut our momentum when we closed earlier than expected: as a result, there was a 14.9% reduction in visitor numbers compared to the previous year, in other words 874 386 ski-days achieved.

The Weisse Arena group worked rapidly to put an action plan in place to deal with the health crisis, in order to prepare for the 2020/21 winter season, even in the event of a second pandemic wave. In addition to the usual operational measures, three innovative measures were put in place:

- » All the self-service restaurants were fully reconfigured and reorganised under the working title "Fresh & Easy". The principle: customers can order and pay for drinks and food from the table in the restaurant using the "Inside Laax" app. Their order is then brought to the table. In addition to this improvement in customer comfort, the supply chains and processes were also completely rethought, in order to be able to react much better to the strongly fluctuating customer numbers in the future.
- » A new Covid testing system has been developed for employees and customers. The introduction of self-tests, as well as the process of pooling laboratory tests and tests in our company, was used for the first time in Switzerland in mid-December. The processes developed for Laax have now become the Swiss standard. The whole staff of the company was tested every morning (15,000 tests carried out over the winter of 2020/21).
- » The third innovation concerns ticket sales. In autumn 2020, it was decided that, starting in the winter, daily ski passes would be sold online only. This has allowed us to set sales quotas and thereby limit the number of customers during certain periods.

6. INTERNATIONAL (SPACE) STATION

Thanks to these innovations and all of the classic measures taken by the resorts, the cantonal government authorised operation during the last winter season. However, we had the impression that we were "walking on hot coals" all winter, with the threat that the resorts could close at any time. In all of the neighbouring countries, decisions were made not to allow the operation of ski lifts for the winter or, in the case of Austria, to almost bring winter tourism to a halt. Therefore, there was considerable pressure on Switzerland to follow the movement of its neighbours. Fortunately, the government of Les Grisons has always been aware of the economic importance of tourism for the canton and searched for means to keep the lifts open and make it possible to maintain winter tourism.

The start of the winter season 2020/21 was not just politically difficult. The bad snow conditions at higher altitudes than usual, as well as the ever-changing regulatory framework for operations, particularly in the catering sector, also hit the organization hard.

Very low occupancy was recorded over the Christmas season. The great uncertainty and lack of customer confidence in the wake of the political discussions, the difficult snow conditions with many lifts closed, and the Covid-related quota system for the sale of day passes led to a loss of revenue of around CHF 7 million over the holiday period alone.

With the growing sense of security among customers during January, the implementation of the testing system and the abundant snowfall, attendance was closer to "normal" figures. With the terraces open and good weather in February, combined with a valuable media presence thanks to the testing system, the rest of the season went more smoothly.

Overall, a very reasonable winter was recorded with 981 041 first entries (the previous year, with the lockdown, we were at 874 386). Financially, the Weisse Arena Group can speak of a good financial year, despite the extremely difficult circumstances. At CHF 89.5 million, net sales are CHF 1.4 million higher than in the 2019/20 financial year, but still significantly lower than the excellent 2018/19 financial year at CHF 7.5 million less.



María José RIENDA CONTRERAS - Spain

In March 2020, when we closed, we had had an excellent season in Sierra Nevada resort. We had put a plan in place like all the other resorts. Each independent region was making its decisions based on the local situation.

We stayed open, but we were constantly calculating between "What are we gaining?" and "What are we losing?".

The local police were present in the resort to ensure our visitors' safety.



Kenta TAKAMORI - Japan

We stayed open throughout the pandemic and decided to close a month earlier than planned, in April 2020. We didn't have to, but the impact was huge, we lost almost 40% of our revenue during the winter 2020.

The state of emergency in Japan was a major factor and the government put a lot of pressure on the population to keep leisure activities and travel to a minimum.

Quarantining has also been a major obstacle to hosting tourists from abroad, whereas, before the pandemic, the international clientele represented 30% of the total.

To compensate, we hope that the coming season will see an increase in domestic clientele, but this is not a very realistic expectation given the state of the market.

6. INTERNATIONAL (SPACE) STATION



QUESTION #3



QUESTION #3

In Europe, the notion of ecological transition is ever more present in public debate and decision making. It is therefore a question of finding the right balance between development and environmental protection, while adapting to new expectations.

Is this notion of "transition" present in your activities?

What does it mean to you and how does it translate?



Irakli TCHIRAKADZE - Georgia

The concept of ecological transition is not as important in Georgia as in the other European countries. The subject exists, of course, but it is less prevalent and is not yet the centre of attention.

We are implementing actions related to this subject and integrating this aspect into our projects: we pay attention to the way we build, how we develop ski runs and new lifts. We take care to preserve the forests by adapting the construction of lifts.

Diversification is also part of our strategy. We want our sites to be able to develop their activities for the four seasons, not just for two.

For the time being, the share of the summer season is still low: 10 to 15 % of the annual activity. But we are implementing projects to bring in customers year round.



James ACKERSON- Chile

Chile has a powerful and highly active Ministry of the Environment. Controls in the mountain areas and the resorts are very strict. The Ministry has done a good job over the past five years in addressing the topic and that is working: the population is educated on the subject, especially the young people. Nevertheless, since the majority of the Chilean resorts are privately owned, they control these different points themselves, which can sometimes be problematic...

In Chile, many resorts have already diversified their activities and are working with the local populations and the provincial governments to diversify their offers.

In the Santiago region, diversification in summer is a crucial issue because the resorts suffer from a lack of snow. Nonetheless, they are lucky enough to have an exceptional natural environment that they are enhancing with local development and local partners. Community connection is crucial for the future.

6. INTERNATIONAL (SPACE) STATION



QUESTION #3



Reto GURTNER - Switzerland

This is a strategy that we have already been committed to for 15 years. Our goal is to become the first Alpine resort to be fully self-sufficient in terms of our energy requirements, thanks to environmentally-friendly resources.

We are following an action plan consisting of 7 axes: electric mobility (using hydrogen vehicles and recharging equipment), energy storage, decarbonizing the existing buildings, maximizing energy efficiency, infrastructure electrification (installing solar panels on roofs and facades), using wind, hydro and solar power, and the Smart Grid.

According to our calculations, the resort requires 280 GWh of energy and the potential for self-generating energy is estimated at 290 GWh. However, by maximizing our energy consumption, we can reduce our needs to 179 GWh. We will succeed in reducing our energy consumption on the lifts by 50%. Everything will be transformed in the coming years.

People are now educated on the subject: we have to show that we are leaders, not just followers. It is a whole series of small measures that will allow the generation of an ecological ecosystem. We have to create this ecosystem.

As regards the ecological challenge: we are constantly talking about reducing..., but I think that on the contrary, we have to think about how to produce more energy, "clean" energy, through better use of technologies. We could be the leaders, real players in the mountain sector.



María José RIENDA CONTRERAS - Spain

The resort of Sierra Nevada is part of a national park: naturally, the subject has been on the table for a long time here. The region is supported by European funds, particularly for making investments in this area. Our visitors are of course sensitive to it, because they know that the destination is located within a national park.

In any case, I think we can no longer develop as a ski resort. On the other hand, we know that there are opportunities as a mountain destination.



Kenta TAKAMORI - Japan

So far, we have not found the opportunity to carry out projects related to this theme, due to limited investment capacities. The resorts in Japan are not very well informed on this subject because customers are not very sensitive to it.

Compared to French resorts, Japanese resorts receive little help and support in this respect and there is a lack of recognition of the sector by the government.



6. INTERNATIONAL (SPACE) STATION



QUESTION #4

QUESTION #4

**What place do you see for new business models in your activities?
Have you already embarked on a strategy to diversify your
activities?**



Irakli TCHIRAKADZE - Georgia

On one of our sites, we have a project for an artificial lake (hill reservoir), to be used for the production of artificial snow. We are planning to use it in the summer season by developing it for water activities, like water skiing. In Bakuriani, the first summer toboggan run was installed four years ago.



Kenta TAKAMORI - Japan

The summer season is very short in Japan, due to the short Japanese holidays. This lack of holiday time is in fact the biggest issue for tour operators. The Japanese do not take enough holiday time!

For the moment, the resorts have not yet found a magic recipe for developing the activity. Mountain biking is undoubtedly the most interesting activity, but we have very steep, rugged terrain, which does not make it easy.



María José RIENDA CONTRERAS - Spain

Yes, we are considering a diversification strategy, with a "mountain destination" approach, because we can no longer develop any further as a ski resort. Although the need to develop this type of strategy is evident, it is not intuitive for us. Since we are in the south of Spain, the snow in the Sierra Nevada is a "miracle" that generates a very strong attraction. Snow is therefore our priority and we are particularly concerned with the implementation of measures to prevent global warming and its effects. Nevertheless, since the village of Sierra Nevada is over 2000 m above sea level, the coolness to be found there in summer will be an additional lever of attractiveness, especially as we suffer from increasingly frequent heat waves.



Landing!

**As the fashion for space travel is for "short stays", we could observe only a part of our mountain universe.
Other destinations will certainly have to be explored in the future!
Watch this space...**

7. FROM THE IDEAS BOX TO THE TOOLBOX



FROM THE IDEAS BOX TO THE TOOLBOX

7. FROM THE IDEAS BOX TO THE TOOLBOX



TOOL #1

TOOL #1

CLUSTER MONTAGNE LABS... WAZZAT?

Launched in 2021, the Cluster Montagne Labs is a dynamic process of networking and collaborative innovation between companies and decision-makers of mountain territories to face the numerous challenges of mountain tourism:

- » Accelerating the energy and sustainable development transition
- » Boosting site accessibility and frequentation
- » Strengthening the safety of people and infrastructures
- » Diversifying the all-season tourism offer and services
- » Integrating digital solutions in amenities and services
- » Guaranteeing optimum exploitation of sites

It is in our cluster DNA: we are convinced that these challenges can be met through strong relationships between the ecosystem's different players and better knowledge of the issues, challenges and projects. To this end, the Mountain Labs Cluster programme provides a process through which decision-makers can:



Be inspired and bring out ideas

- » 10 minutes waiting time between two appointments? Take your Mountain Trend Book out of your bag (the best place to leave it after your bedside table) and be inspired by our experts...
- » Benchmarking mission in France and abroad: seeing is believing, finding inspiration in good practices here and elsewhere.



Tell us about your challenges and projects

- » Field Day: 6 hours to present a resort's challenges and benefit from collective intelligence to start innovative projects.
- » Cluster Montagne Talks: tell me about your territory... (digital discussions).



Become a place of experimenta- tion

- » Cluster Montagne Labs' call for projects: a creative and structured process allowing you to identify your future innovation!

Becoming a player in the Cluster Montagne Labs programme means giving yourself an additional opportunity to grow your ideas and make them a reality.

Do you want to be part of the adventure? Your contact: pf.adam@cluster-montagne.com



TOOL #2

A RESEARCH CHAIR FOR THE TRANSITION OF TOURISM TERRITORIES

Since 2019, the Cluster Montagne has been a partner of the Territories in Transition chair, led by the Grenoble Management School (GEM). The objective of this multi-partner research chair is to produce the knowledge that will make it possible to analyse, imagine, experiment and transmit new systems to accompany the transformations towards sustainable and inclusive living spaces.

Certain territories, including those in the Grenoble region, are showing their willingness to renew the existing models going towards new modes of organization, which place citizens at the heart of their reflections and actions. To this end, the chair is developing four work streams, in close collaboration with GEM's research teams and its partners and sponsors (Bouygues Immobilier / Groupe La Poste / Grenoble-Alpes Métropole / SMMAG / Ville de Grenoble / Fédération Léo Lagrange / Mutualité Française de l'Isère / Cluster Montagne / Département de l'Isère / Alpes Solidaires / Grenoble Region Urban Planning Agency / Citiz / GAIA / La Péniche-La Turbine / Ronalpia):



New eco-responsible behaviour



New organizational models



New methods for developing innovative projects



Transition of the mountain territories

7. FROM THE IDEAS BOX TO THE TOOLBOX



TOOL #2

In the framework of the 4th stream, the Cluster Montagne and GEM have the goal of jointly developing promotional and collective reflection tools applicable to mountain territories, to accelerate the transition. Here are our first results:



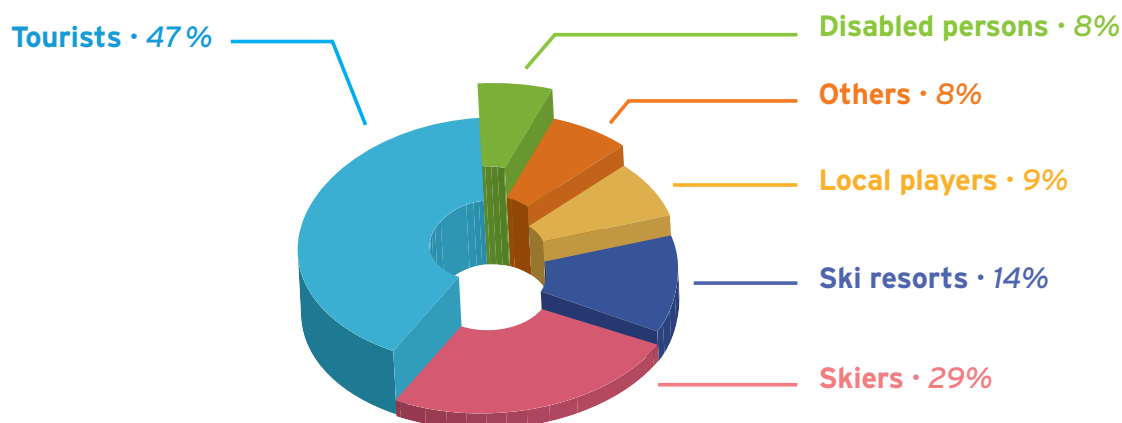
STIMULATING IDEAS AND CREATIVITY: "INNOWEEK MOUNTAIN"

From January 4 to 8, 2021, the Cluster Montagne and GEM proposed to 800 2nd year students that they apply innovative methods for rethinking tourism services in the mountains, based on 7 themes: Customers and new consumers, environmental transition, mobility, infrastructure optimisation, Big Data and digital technology, cohabitation/synergies, safety. Over 130 projects were proposed, some forty of which were pre-selected, with a final fifteen retaining the attention of the jury.

Through the eyes of students and the innovations proposed, could new or little-known expectations or aspirations be identified as notable trends?

A brief overview of the themes covered by the projects:

- » The answer to the problems of overcrowding, perceived in particular on the slopes and between the resorts (13% of the projects).
- » The search for safety and solutions to overcome people's fear of the mountains (avalanches, skiing accidents...) (11% of the projects).
- » Ideas to match the price of mountain stays with a wider target (9% of projects).
- » Tourists as the main target (47% of projects).



Main targets of the Innweek projects

7. FROM THE IDEAS BOX TO THE TOOLBOX



TOOL #2

Whether realistic or utopian, all Innweek projects are certainly inspiring!

Discover our favourites:

01. "CUSTOMERS AND NEW CONSUMERS"

It should be noted that: 30% of innovations in the "customers" axis aim at diversifying the offer and attracting new customers, while 70% target existing customers.

- » **Montaski:** space dedicated to ski touring with treasure hunts or awareness and initiation stands.
- » **Pump It:** inflatable ski boots for easier transport by making them less bulky.

02. "ENVIRONMENTAL TRANSITION"

- » **Clean Snow:** an autonomous all-terrain robot that finds and collects waste, even under the snow.
- » **Weekolo:** installation of light turbines on the side of roads to produce energy using the wind generated by passing cars.

03. "MOBILITY"

- » **Easylift:** a hammock-style draglift that is more comfortable and practical for snowboards, children or mountain bikes.
- » **Snowflake:** all-terrain electric scooters with an integrated ski carrier to get around the resort.

04. "INFRASTRUCTURE OPTIMISATION"

- » **L'Évasion:** turning gondolas into "hotel cabins" to sleep right in the heart of the mountains.
- » **Meet'N' Chalet:** a platform that brings together businesses and gite owners to use the gites as occasional coworking spaces.

05. "BIG DATA AND DIGITAL TECHNOLOGY"

- » **Hud Helmet:** a connected ski helmet with GPS, Bluetooth and real time information on the visor.
- » **Wind dow:** what if there was information on the state of the runs, the latest resort news, the scenery, etc. on gondola windows?

06. "COHABITATION/SYNERGIES"

- » **MountUp:** a web platform where a territory's local players can propose services, tours, rentals, etc.
- » **AirMontagne:** an app that highlights the culture and expertise of a territory's local players, as well as offering information on the region, local producers, etc.

07. "SAFETY"

- » **Safety Drone:** a drone that can warn of avalanche risks and trigger them remotely.
- » **Safer Mountain:** a badge with RFID antenna containing medical data and making it possible to geolocate people in case of accident.



7. FROM THE IDEAS BOX TO THE TOOLBOX



TOOL #2



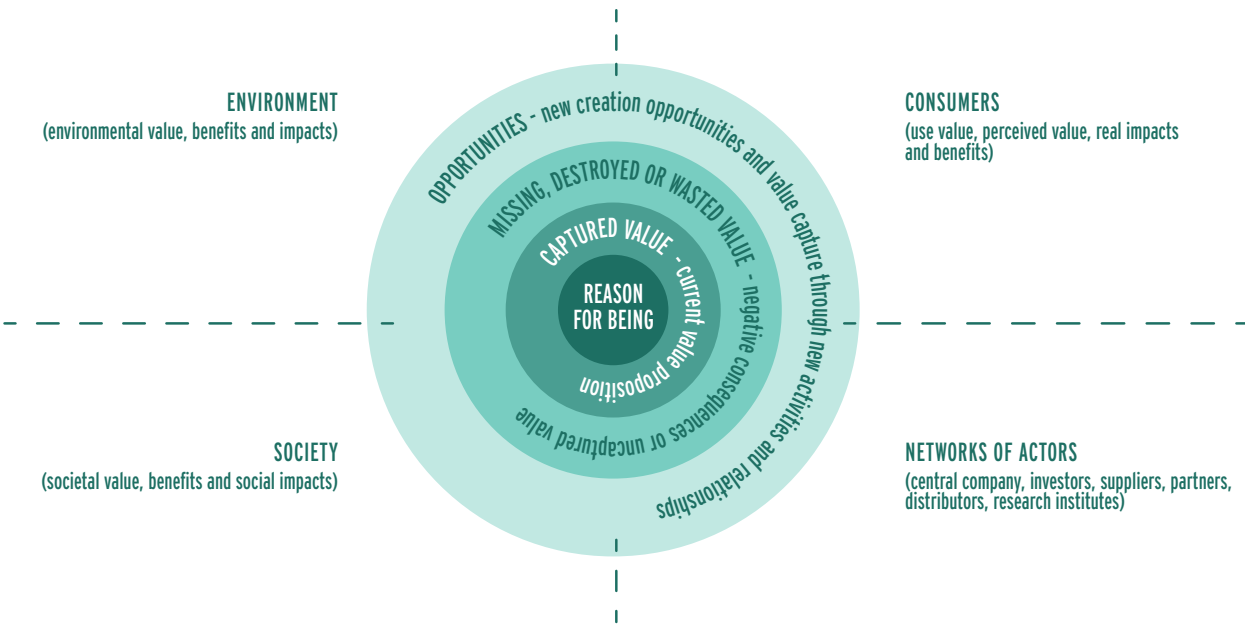
USING TOOLS TO RETHINK BUSINESS MODELS

Faced with the many changes and upheavals that are currently affecting the mountain territories, the Cluster Montagne and the Territories in Transition chair at Grenoble's School of Management have decided to work together on identifying and testing tools that will help answer the famous question "OK, but where do I start?".

Three work streams were defined: radical foresight, governance and business models. For the latter two, the question of sustainability leads to a redefining of the notions of value and performance, which requires collective reflection on new business models capable of strengthening and accompanying this transition.

Nonetheless, the diversity of players and the historic specificities of the French mountains make reflection on a common strategy complex, hence the idea of using collective intelligence tools.

Researchers at GEM therefore undertook to reference and compare different tools for rethinking the business models of companies, sectors or territories. Their benchmark led to the selection of the "value mapping tool for sustainable business modelling", developed by sustainable business model specialists (Bocken et al, 2013).



Value mapping tool for sustainable business modelling

7. FROM THE IDEAS BOX TO THE TOOLBOX



TOOL #2

This tool initially allows the unit of analysis (territory, sector or company for example) and the set of stakeholders we want to include in the analysis (consumers, environment, network of players and society in the simplified version) to be defined, as well as the *raison d'être* of the chosen unit. Then, all that remains to be done is to successively address the question of the values created/captured, then destroyed/missing, and finally the new opportunities for capturing value for all the stakeholders.

The advantage of this tool is that it allows for dialogue between all the stakeholders, reflecting on different forms of values. This makes it possible, for example, to see how the creation of value for one stakeholder can have a destructive impact on the value of other stakeholders, and therefore to reflect on ways to minimise this impact or favour other creations of values. The tool also makes us think systemically, taking all the players into account and adopting a broader vision of the value proposal.

To test this mountain territory transition tool, some twenty members of the Cluster Montagne participated in two workshops in autumn 2021. The workshops were held in the TIM lab, a space dedicated to design and innovative processes in the Grenoble School of Management. For each workshop, 2 groups of 4 to 6 members of the Cluster Montagne, supervised by researchers from GEM, worked for 3 hours on the transition of pilot territories, like Bourg-Saint-Maurice-Les Arcs, Flaine or Les 2 Alpes.

The feedback has been very positive, confirming the pertinence of this tool, which is affordable and intuitive, allowing several stakeholders to get involved and to take the local specificities into consideration. Some interesting initial ideas for the transition of these mountain territories have already emerged.

Following these first successful workshops, several participants have expressed their interest in this tool and would like to test it further in their territories.

Watch this space!



References: Bocken, N., Short, S., Rana, P., & Evans, S. (2013). A value mapping tool for sustainable business modelling. *Corporate Governance*, 13(5), 482-497. <https://doi.org/10.1108/CG-06-2013-0078>



TOOL #3

THE INSTRUCTIONS FOR USE OF A SUCCESSFUL COLLABORATION



Rémi ARDIET • CIFRE PhD - Cluster Montagne, Grenoble Alpes University, INRAE Grenoble, SENS Laboratory

The Mountain ecosystem is lucky! Made up of a multitude of stakeholders - citizens, businesses, investors, elected officials, decision-makers... - each giving their contribution, their energy or their expertise to give life to our passions and our territories. It is the intelligent articulation of this network that will make our destinations and the places we live in a success. But in fact, have you ever asked yourself if there are good practices for starting a collaboration?

In etymological terms, the notion of collaboration means "working together" and can be defined as the action of two or more people working collectively towards a common and previously defined goal (Salvato et al, 2017). The specific scientific literature has highlighted collaboration as one of the tools available to solve complex problems involving many interdependent actors (Trist, 1977). From a theoretical viewpoint, inter-organisational collaboration constitutes one of the bases of the competitiveness of a business ecosystem (Moore, 1996).

This is particularly the case in the social and economic ecosystem of sport and mountain tourism (Bouhaouala, 2017), where the question of how to reconcile economic and social development, protection of the environment and tourism, is posed intensely after two black years with the closure of the ski lifts caused by the health crisis.

Numerous collaborative initiatives have already been generated by the ecosystem. We can cite the "Cluster Montagne Labs", involving territories and experts in a

logic of innovation, or the Etats Généraux de la Transition du Tourisme de Montagne (General Assembly on the Transition of Mountain Tourism) organised by Mountain Wilderness and 2TM in the framework of the French presidency of SUERA (European Union Strategy for the Alpine Region), joined in their approach by many of the players involved in mountain tourism.

The main purpose of these examples of actions is to encourage all partners to work collectively towards a common future, which they will define as desirable.

The thesis work carried out by Rémi Ardiet within the Cluster Montagne also raises the question of collaboration, focusing on an analysis of the collaborative projects carried out by the cluster or by member companies.

7. FROM THE IDEAS BOX TO THE TOOLBOX



TOOL #3

THE KEY FACTORS OF COLLABORATION

The existing literature on the subject of inter-organisational collaboration has highlighted several crucial elements that can encourage collaborative work between the members of a project: identification of the right stakeholders, common shared values, expected benefit greater than cost, balanced distribution of power positions, geographical proximity, ability to cope with change, etc. (Gray, 1985).

Parallel to this, the results of the initial research carried out within the Cluster Montagne highlights on the one hand the importance of the strength of the existing links between the organisations (Granovetter, 1985). It seems that the presence of strong links between the members of a project constitutes a point of vigilance: too high a level of interdependence can sometimes make project management difficult, particularly when it creates an imbalance in the power relations between the partners. Conversely, collaborative projects where the links between the organisations tend to be weaker seem to work better.

On the other hand, the question of the group size, highlighted through the theory of clubs (Buchanan, 1965), also seems to have an impact, if it is too small... or too big. To judge the appropriate size, the costs and benefits for each stakeholder in the collaborative project must be assessed, costs and benefits that tend to vary according to the number of participants.

Lastly, the need to have a clearly identified project leader and a precise definition of the process of member involvement (designation versus volunteering) and the sharing of project objectives or the diversity of profiles is also evident...

The parameters that make a collaborative project successful are extremely dynamic and require specific management. According to a study published in 2017 by Dell and the Institute for the Future, 85% of 2030's jobs do not yet exist. Is this the case for the job of inter-organisational manager?

STRONG LINKS / WEAK LINKS

American sociologist Mark Granovetter's network theory shows that there are different types of links in a network of social relationships (1973). He believes that there is a duality between what he calls "strong" links on the one hand, and "weak" links on the other. He uses different indicators to define the strength of links: time spent, emotional intensity, the closeness and reciprocal services between individuals (2017).

In his study of the job market in the United States, Granovetter shows, for example, that weak links are more prolific than strong links when it comes to finding work.

Studying the strength of links in a network opens up many perspectives for research into understanding better how the strength of links acts on the interactions and collaborations between several actors.



Rémi ARDIÉT - France

Rémi Ardiét holds a master's degree in International Sport Management from the University of Lille and has been preparing a CIFRE thesis at the Sport and Social Environment Laboratory (UGA) since 2019, in partnership with the Cluster Montagne. His research work aims at a better understanding of the logic of collaborative innovation in the mountain sport and tourism ecosystem.

7. FROM THE IDEAS BOX TO THE TOOLBOX



TOOL #4

TOOL #4

ALPES TOURISM LAB

The first incubation, acceleration and open innovation system to develop innovative solutions as answers to the new challenges of alpine tourism



Created in 2021 by the Incubateur Savoie Technolac de Chambéry Grand Lac Économie, the Cluster Montagne, French Tech in the Alps-Chambéry and Le Village by CA des Savoie, the Alpes Tourism Lab is a support system dedicated to project holders, start-ups and intrapreneurs, designed to respond to the challenges of alpine tourism. The Alpes Tourism Lab is a tool that can help to transform Alpine tourism models based on 5 major issues:

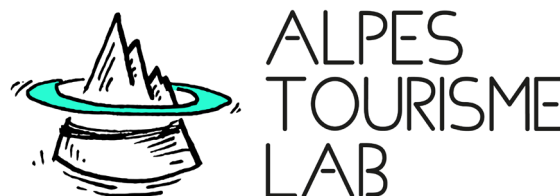
- » The habitat
- » Energy
- » The circular economy
- » Mobility
- » The new business and diversification models

This process is based on a dynamic approach, centred on the entrepreneur, which responds to the challenges of the start-up and in connection with the innovation needs of the players and decision-makers in Alpine tourism. The support consists of individual meetings and 3 collective and immersive bootcamps with:

- » Discovery of the territories
- » Coaching sessions
- » Workshops with experts
- » Speed business meetings
- » Synergies between start-ups

In 2021, out of 46 applications, 7 start-ups were selected to join the 1st promotion of the Alpes Tourism Lab (see page 96). The goal? To discover the Alpine tourism ecosystem and refine your value proposition and commercial strategy in conjunction with our partners: Aix-les-Bains - Riviera des Alpes, Agence Savoie Mont Blanc, La Plagne, La Clusaz, Grand Chambéry Alpes Tourism, Parc Naturel Régional des Bauges, Syndicat d'Aiguebelette...

In 2022, we intend to assist a new group of start-ups!



7. FROM THE IDEAS BOX TO THE TOOLBOX



TOOL #4

The Alpes Tourism Lab's 7 start-ups for 2021:

BonneCabane

BonneCabane is a simple and efficient solution for housing, storing and producing solar energy, which is fully in line with regional energy transition.

Prairy

Prairy is the first mobile app dedicated to local tourism in the Auvergne-Rhône-Alpes region that allows users to (re)discover its natural and cultural heritage through personalised recommendations for activities and tourist sites to visit close to where you live.

La Bulle Verte

La Bulle Verte is a moduable eco-resort designed to your specifications and which includes different services for a low-carbon tourist experience: Bike/scooter rental, charging station, relaxation and information area ...

SkiTEC

SkiTEC meets the specific needs of the mountain territories: managing waste from the ski activity (500 000 skis are thrown away every year in France - out of 800 000 put on the market). SkiTEC gives skis a second life: bike shelters, photovoltaic shades, sheds and greenhouses, as well as furniture, fittings and decoration.

Parcel

Parcel offers an ecotourist offer: a minimalist eco-responsible hut that can be put up in the middle of nature, on farmers' land or in the heart of natural areas in the Alps. Relaxation and discovery of the local heritage on the programme!

Ski Family

Ski Family is a ski school that guarantees a modern experience before, during and after the lessons, through multi-service bookings, fun learning using digital technology and enhancement of the solution to other outdoor activities, to promote a diversification of the offer to customers.

Skizy

Izipay proposes Skizy: a cashless solution for resort visitors that combines a full range of services on the same support, to allow unrestricted consumption of the resort's activities.



7. FROM THE IDEAS BOX TO THE TOOLBOX



TOOL #5

TOOL #5

CLUSTER MONTAGNE SOLUTIONS

Discover the French solutions for developing tomorrow's mountain



Cluster Montagne Solutions is a digital platform that allows tourist offices, communes, mountain resort operators, local authorities, institutions, professionals and visitors to easily discover the expertise and achievements of French companies in the mountain sector in France and abroad.



www.cluster-montagne-solutions.com/home

How to use the Cluster Montagne Solutions effectively?



A directory to identify your future mountain territory partners and experts

Go to www.cluster-montagne-solutions.com/home and adventure into the "Locate" section to find your future partners and be inspired by remarkable achievements near you, or on the other side of the world!



An international benchmark for solutions for mountain territories... from your office!

Still on www.cluster-montagne-solutions.com/home, click on "Discover". Durability, Interactivity, Security, Concertation, Fun or Performance, you will always find an answer to your questions!

THANK YOU!

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Would you like to participate in the Cluster Montagne's forward-looking dynamic or the next Mountain[s] Trend Book? Your contact: pf.adam@cluster-montagne.com



SO WHAT CAN WE DO TODAY?

Work together in a collaborative innovation dynamic!

Whether you are a member of the Cluster Montagne or a player in the mountain sector, the Cluster Montagne Labs dynamic allows you to participate in privileged moments of discussion and reflection on the issues and projects involved.

Benchmarking missions, leading group projects, the Cluster Montagne Solutions platform, organising Field Days, calling for innovation projects... Join the Cluster Montagne Labs dynamic to co-construct the mountain of tomorrow.



Join the Cluster Montagne Labs dynamic:

PF.ADAM@CLUSTER-MONTAGNE.COM

Discover the remarkable achievements of its members:

WWW.CLUSTER-MONTAGNE-SOLUTIONS.COM



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