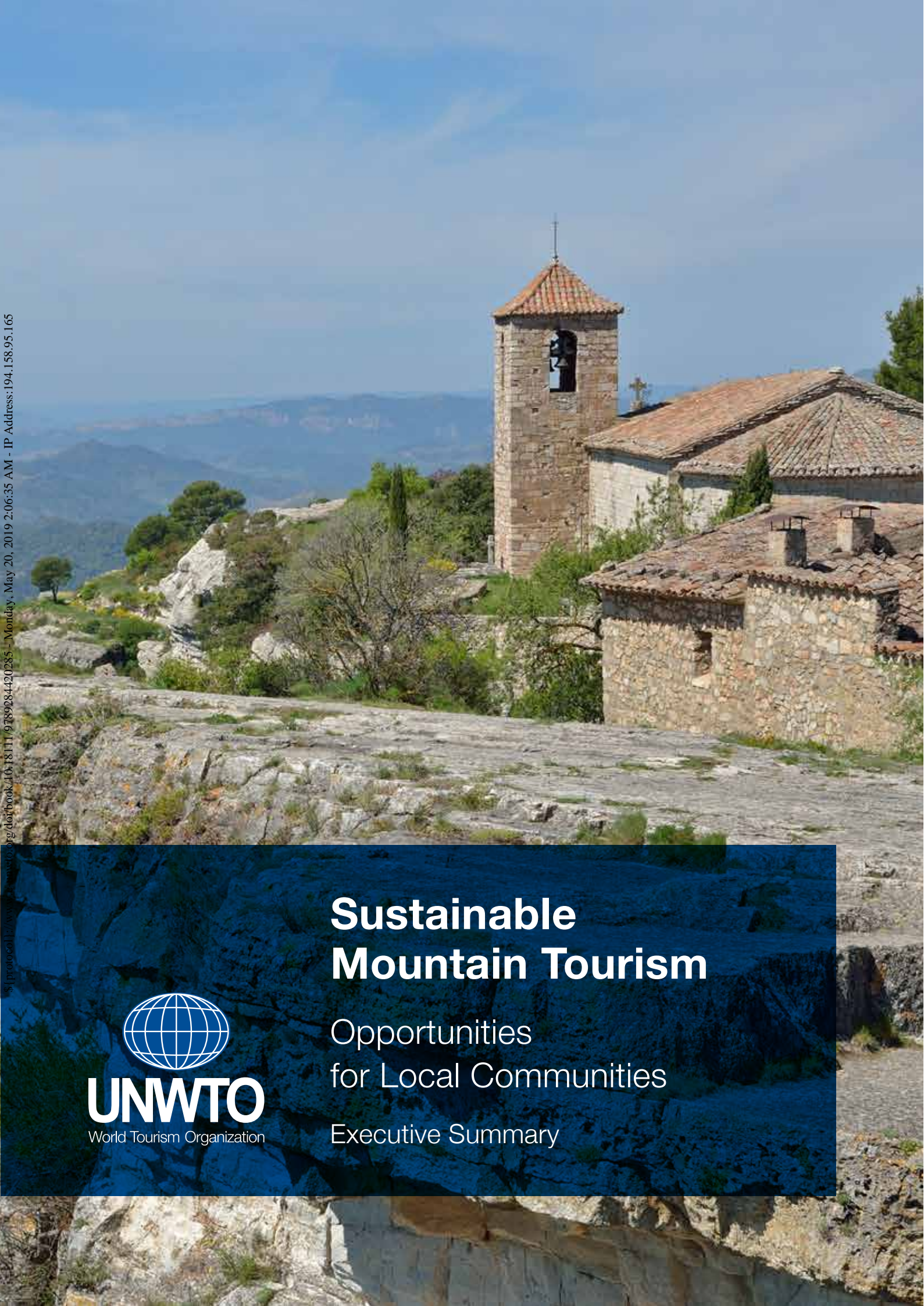


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Sustainable Mountain Tourism

Opportunities
for Local Communities

Executive Summary



UNWTO
World Tourism Organization

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Executive Summary

Acknowledgments

This report was written for the World Tourism Organization (UNWTO) by Professor Dr. Peter F. Keller under the supervision of Ms Esencan Terzibasoglu and Mr Sascha Stange (former UNWTO Destination Management and Quality Programme). Since 1998, Prof. Keller has been a scientific expert of UNWTO's World Congresses on Snow and Mountain Tourism hosted by the Principality of Andorra and one of its initiators in his former capacity as the Head of Tourism at Switzerland's Federal Administration and Director of the Tourism Institute of the University of Lausanne.

Dr. Luigi Gaido, Technical Director of the World Congresses on Snow and Mountain Tourism, provided support in the elaboration of the cases. The learning cases included in the present publication have all been presented at UNWTO's World Congresses on Snow and Mountain Tourism, organized on a bi-annual basis in cooperation with the Government of the Principality of Andorra since 1998, and at the First Euro-Asian Ski Resort Conference of UNWTO, which took place in Almaty, Kazakhstan in October 2013.

Foreword

In many mountain destinations, the tourism sector drives the socioeconomic growth and development of local communities. Yet mountain areas often face difficult challenges to their development, including harsh climate conditions, vulnerability to natural disasters, and problems of remoteness and accessibility. These challenges may hinder economic activities, infrastructure development and industrial production in mountain regions. In this context tourism – a labour-intensive sector with multiple links across the economic value chain – represents an opportunity to uplift local communities and stimulate growth in mountain destinations.

Recognizing the potential of mountain tourism for developing the sector, UNWTO has been organizing the World Congress on Snow and Mountain Tourism in cooperation with the Principality of Andorra every two years since 1998. This event is an important platform for tourism stakeholders in the public and private sector to discuss the most relevant issues facing mountain tourism at the global level. With a significant number of mountain destinations emerging around the world, UNWTO has also launched the Euro-Asian Ski Resorts Conference to bring together new and traditional ski destinations to exchange knowledge.

This publication presents a summary of the information generated at UNWTO's mountain tourism events, including a systematic definition of mountain tourism. In addition, it gives an overview of the development of mountain tourism in different parts of the world over time, and the recent structural changes affecting this segment as a result of new market patterns. I trust that this publication will be an invaluable tool to help us better understand mountain tourism and advance its effect in promoting social, economic and environmentally sustainable development in destinations across the world. I take this opportunity to thank all those that have contributed over the years to UNWTO events advancing mountain tourism, whose contribution is reflected in this publication.

Zurab Pololikashvili
Secretary-General,
World Tourism Organization (UNWTO)

Executive summary

The interdependence of the mountain ecosystem and tourism development

Mountains in the Alpine or sub-Alpine zones have long been attractive tourism destinations, thanks to their unique ecosystems that fundamentally provide the resources for tourism development. Factors that include climate, topography, scenery and the seasonal cycle all determine the facilities and activities of mountain tourism, reflecting the strong interdependency between the mountain ecosystem and the mountain tourism system. Tourism development must therefore go hand in hand with protecting and preserving these resources to ensure tourism's long-term growth and viability. Investments in tourism-related facilities can valorize these resources in terms of creating employment and income to the local residents of mountain regions.

However, not all mountain areas are considered worth visiting by potential visitors. Only those which offer a sufficient number of attractions motivate potential visitors to come and spend money in a destination. Such attractions are mostly a combination of natural and man-made attractions, such as peaks with outstanding panoramas or skiing areas with diversified slopes, both easily accessed by cable cars. The willingness of visitors to pay for these attractions determines the potential and hierarchy among mountain destinations. The more outstanding and numerous the attractions, the more companies settle around the destination, providing them opportunities to profit from increasing returns and agglomerative impacts.

Mountain tourism structures are the result of a long specialization process

New destinations are generally discovered by an elite group of visitors who want to explore and see new things. It therefore comes as no surprise that philosophers, poets and painters were among those who discovered the mountains as a destination about 200 years ago. As an example, Jean-Jacques Rousseau saw in the idyllic mountain landscapes of his homeland a kind of paradise lost, a place that recaptures the authenticity of nature. His ideas, propagated and enhanced mainly by British poets and painters, were influential in motivating the first run of young people among the upper classes to the Alps.

Pioneering entrepreneurs in turn provided the facilities and services for the best possible mountain experiences, including British-style palace hotels, cogwheel railways and funiculars that eased access to mountain destinations. Since guests often stayed for months, these entrepreneurs increasingly offered them a great variety of outdoor leisure sports activities. They proved to be independent innovators who trusted in their own expertise and took risks in investing their own money without the help of the state.

The “Belle Epoque” of mountain tourism came to a halt during the 20th century’s two world wars and the Great Depression, which saw the disappearance of the wealthy leisure class. Consequently, mountain tourism fell into a deep structural crisis that lasted well into the 1950s. However, the advent of paid vacation time and individual motorization led to an unexpected renaissance of Alpine tourism in the 1960s, which brought with it a series of innovations in the field of mountain leisure sports and accommodation. Downhill skiing became the key to a lucrative winter season, albeit often at the expense of the summer season. Skiing became an industrialized system with greater lift capacities. With an ever-growing variety of groomed slopes, which could even be artificially covered with snow, Alpine mountain ski resorts soon became the benchmark for worldwide mountain tourism development and was imitated all over the world.

The long process of mountain tourism specialization was driven by favorable framework conditions. The early industrialization of the countries surrounding the Alps allowed developers to invest in mountain tourism facilities for the visitors coming from the wealthiest countries of the time. The increasing wealth of the population stimulated a culture of mountain leisure sports activities such as mountaineering, hiking or skiing, all of which became very popular in these countries as the trademarks of a sophisticated lifestyle.

The main assets of the mountain tourism market are its four seasons and its strong home market

Mountain tourism has the advantage of attracting visitors throughout the year. The contrast between its white winters and green summers is a source of endless fascination, while providing visitors from the flatlands the opportunity to escape from the winter fog and summer heat.

The ecosystem which provides the climate and the topography determines the strategic products of mountain tourism, including mountaineering, hiking and biking during the summer season and any number of gliding sports on snow. These products also reveal the fact that winter and summer visitors come from different market segments, with younger sportspersons in winter and older people and families in the summer representing the three main target groups.

Mountain tourism is essentially based on domestic and local source markets with an established mountaineering or skiing culture. It is not possible to develop lucrative mountain tourism without a strong domestic and local demand. The market entry of new mountain tourism countries therefore led more to an enlargement over an internationalization of the overall mountain tourism market. In fact, the degree of internationalization of mountain tourism is rather low. International demand is concentrated in the most attractive individual resorts.

Mountain tourism has reached maturity and changed from a mass to a multi-niche market in traditional mountain tourism countries

As previously mentioned, mountains were discovered as a tourism destination some 200 years ago, with mountain tourism subsequently going through periods of strong and weak growth and reaching its peak in the traditional mountain tourism countries from the 1960s to the 1980s. During this period, mountain tourism boomed in the developed countries situated near mountain ranges and became a mass tourism phenomenon, increasingly perceived as a must for family holidays in

the summer and winter. Skiing in particular became a leisure sports activity across the social class spectrum of these developed countries.

The ongoing globalization process has also contributed to a profound structural change in the world of tourism as mountain tourism lost its monopoly on winter holidays due to the increase of beach holidays in the Southern hemisphere as a result of cheaper air transport. The proliferation of affordable beach destinations and other forms of vacationing in the flatlands has led to fierce substitution competition, leaving out mountain holidays as a preferred choice. Similarly, the number of skiers has shrunk due not only to the spiralling costs of the sport, but also to the fact that skiing skills are no longer being transferred from generation to generation in societies that have become increasingly multicultural. In short, mountain tourism is no longer a form of mass tourism, but rather represents a form of multi-niche tourism.

The development on the demand side has led to fundamental changes of the supply structures within mountain tourism. Service providers have increased the comfort, quality, and convenience of mountain tourism facilities, offering potential visitors new mountain sports facilities in the winter and summer. Realizing the growing trend of shorter visitor stays, they are also adapting to the dramatic increase in interest in warmer mountain summers, motivated by the pursuit of a healthy lifestyle through various sporting activities. On the other hand, many visitors from emerging economies are discovering magnificent mountaintop views.

Reinvent mountain destinations by positioning and repositioning, branding and the strategic use of Information and Communication Technologies (ICT)

For a long time following the last mountain tourism boom in the 1960s and 1970s, no targeted marketing efforts were needed to attract visitors to mountain destinations. In short, mountains were fashionable. It was a must for the populations of the regions around the major mountain ranges of developed countries to spend both their summer and winter holidays in the mountains. Back then, mountain tourism was a seller's market.

However, both the maturity, or perhaps even obsolescence of its products, and the proliferation of cheaper destinations all over the world have made mountain tourism in many countries a buyer's market. In such markets, promotional and marketing efforts have become all the more important. Mountain tourism needed to be reinvented. New strategies include the repositioning of the competitive advantages of mountain tourism as a whole and of its individual destinations. As an example, potential visitors must be told that mountain tourism is no longer a mass market with many similar products in all mountain countries, but that it has in fact developed into a multi-niche form of tourism offering both traditionally attractive and innovative new products.

Mountain tourism destinations tend to offer similar products, as such, they should strive to differentiate their product offerings in order to achieve a stronger position in competitive markets. In fact, many mountain resorts are currently looking to both specialize and diversify their range of products, having understood that only through dynamic repositioning based on durable competitive advantages that lead to brand building in the mindset of potential visitors. These processes can be substantially enhanced by ICT, with multimedia websites allowing potential visitors to get a visual impression of a given mountain destination and to plan and book their stay

while enabling the given service providers to track visitors before, during and after their stay to better understand their preferences and travel behaviour.

The key success factors for building and operating mountain resorts are well known

Mountain resorts are specialized tourism systems which provide two different strategic products for different market segments during the summer and the winter season. In the summer, mountain resorts are a playground for outdoor sports such as hiking or biking, whereas downhill skiing dominates during the winter. Nowadays, there are three different types of mountain resorts on the market. The traditional mountain destinations which offer multi-optional products to individual guests started in the main as summer resorts, later adding winter activities if the topography allowed.

The mono-functional ski resort was strategically launched by the French government. It was built for the booming skier demand of the 1970s with the objective of avoiding the typical weaknesses and disadvantages of traditional mountain resorts. Ironically, these resorts were often located at relatively low elevations and hence could not provide ideal conditions for skiing, nor were they able to benefit from offering summer activities due to their focus on winter sports.

In the meantime, hybrid ski resorts for four seasons that combined elements of traditional and functional resorts were built. Developers integrated functional complexes into existing resorts by offering standardized activities for the winter and summer, such as skiing or golfing. The prerequisites and rules for successful mountain resort development are well known. Preconditions and basic requirements include an abundance of snowfall and a wide selection of different slopes for all skill levels of skiers, as well as an attractive design of the resort and the preservation of the natural and cultural landscapes surrounding it.

Tourism is often the only way to create wealth in mountain territories, yet its sustainability depends on the preservation of its environmental resources

There are limited possibilities of creating wealth in mountain economies. Besides certain forms of agriculture and animal husbandry, tourism is the only other territory-bound activity which can provide economic growth. Nevertheless its sustainability depends on keeping the fragile mountain environment and landscapes intact.

From a global perspective, mountain tourism is not a major contributor to environmental pollution and degradation. In fact, it suffers more from waste and pollution than it contributes to it. Global warming has enhanced summer climates in mountain regions, adding to the appeal of summer tourism in the mountains. Yet global warming also has a detrimental effect on the lucrative skiing industry, owing to its impact on winter temperature levels in some areas. While the tourism sector cannot solve the global environmental crisis, it must be aware of its specific responsibility in terms of preventing local ecological damage and the destruction of unspoilt landscapes which can be caused by tourism growth.

Mountain tourism must therefore work on increasing the energy efficiency of resorts during the winter season. On the other hand, the potential negative impact of tourism development on

mountain landscapes in terms of visual pollution must be addressed on a case by case basis by tourism developers in order to strike an aesthetic balance between tourism structures and the natural environment.

Public administrations play a crucial role in stimulating mountain tourism growth since independent entrepreneurship and local initiative have become scarce in poor mountain regions

Historically, independent entrepreneurs have regarded mountain areas of industrialized countries as a profitable venue for investment, developing touristic attractions with suitable resources in remote and economically less developed regions. However, the maturation of mountain tourism brought with it a decline in the involvement of independent entrepreneurs and innovators. Similarly, there has been a decline in local initiatives for developing these areas.

Against this backdrop, the involvement of the public sector is crucial for maintaining social and economic life in remote and less developed regions as well as in formulating a strategy to prevent the exodus of the population. Such state involvement depends largely on the level of development of the country where a given mountain area is situated. In these terms, only countries in the process of industrialization have been able to develop their mountain resources since there was a significant market to justify that development, i.e., their populations had sufficient personal funds for the pursuit of mountain-bound leisure activities and holidays. In addition to local populations, the influx of foreign visitors increased due to the mostly local developers investing in the most attractive sites of mountain areas. It is therefore not surprising that the market-driven development model has prevailed and contributed to stimulating significant growth of employment and income. Conversely, the community-based development models, most of which were supported by the state, failed to achieve the same level of success, and hence, offered niche activities in the end.

It is important to understand the decisive role that local, regional or state administrations should play when it comes to developing mountain tourism. If keeping mountain areas viable is indeed an objective of governments, they should support the development of destinations that are both attractive and suitable for mountain tourism. The prerequisite is that there are investors willing to cooperate with the representatives of the local population in order to assure sustainable development based on the fact that generative growth initially creates positive externalities or impacts for the local population. That shows in more employment and income, whereas rampant growth is likely to create negative externalities in the form of land being laid waste or traffic problems encroaching on a region's quality of life. It is therefore important that municipalities, regions and states put forward framework conditions that take into account the carrying capacities of given areas in order to relativize and optimize the impacts of growth.

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In addition, it gives an overview of the development of mountain tourism in different parts of the world over time, and the recent structural changes affecting this segment as a result of new market patterns.

The **World Tourism Organization (UNWTO)**, a United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 158 countries, 6 territories, 2 permanent observers and over 500 Affiliate Members.



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