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Sustainable Alpine Tourism: the British Ski Industry's Role in Developing
Sustainability in the French Alps

By

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the MSc and/or the DIC.

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Abstract

Tourism is one of the largest industries in the world and is forecast to create revenue of US\$2 trillion by the year 2020. As such, it contributes positively to economies and societies worldwide, but also has the potential to degrade the environment and disrupt cultures on an unprecedented scale. Ski tourism is no different and relies on the mountain environment for its very existence.

Snow-sports are enjoyed by over one million British tourists each year. However, the industry faces a number of issues in the short- and medium-term. Research estimates that climate change will cause snowlines to rise by around 300 metres over the next forty years, forcing skiers to congregate in the highest ski resorts. While sun tourists may welcome a rise in temperatures, any such change will be detrimental for skiers.

The research indicates that communication of potential impacts and solutions is limited and that the tourism industry focuses its efforts on sun-based destinations. Ski tourism has an opportunity to contribute to sustainability and convince consumers to change their behaviour both in resort and in their everyday lives to help preserve the skiing environments they enjoy. However, perceived barriers of cost and lack of demand is limiting action by the industry. The question of responsibility arises: should the industry raise consumers' awareness and stimulate interest or wait for consumers to create demand for sustainable holidays themselves?

The project aims to provide some simple initial steps for the sector to follow. The industry needs to adopt a unified approach to the challenges, collaborating domestically and internationally. Tour operators have a huge potential role and certain organisations are already taking the lead, while representative bodies can facilitate collaboration between numerous parties. A framework is provided to bring various actors together in order to share knowledge on existing practices and practical solutions. When consumers can be convinced of the benefits of acting, demand for sustainable products will increase and the innovative 'first movers' in the industry will benefit.

Executive Summary

The ski industry relies on the environment for its very existence. To date, sustainable tourism has been led by the sun-based sector with little action by the snow-sports industry. With over one million ski tourists in Britain, there is great potential to influence a significant proportion of the population. This study investigates the environmental, social and economic impacts experienced, using Chamonix-Mont Blanc as a case study and examines what is being done by the industry in Britain and France to mitigate them. Barriers and drivers are identified and a simple framework developed to encourage collaboration domestically and internationally. A unified approach is recommended for the skiing community to build on existing interest in developing sustainability.

Background

The WTO has identified sustainability as a crucial goal for the tourism industry. Thus far, few efforts have focussed on the ski industry specifically, but it has a unique opportunity to engage its consumers. Tourists identify a pristine environment as a key requirement for an enjoyable holiday. This provides an immediate incentive for the industry to protect the local resorts and mountains. In the longer term, the industry's reliance on regular, heavy snowfall makes it particularly susceptible to global warming. This affords the opportunity to appeal to tourists' desire to ski in the future. If consumers can be convinced to behave responsibly in resort, it may be possible to expand the message to influence their everyday lives. Of course, it will take efforts by wider society to create fundamental change, but the industry can operate within its own sphere of influence and encourage behavioural change amongst the skiing community. The project identifies impacts at the local resort scale and explores opinion on climate change. It then attempts to establish existing initiatives and potential communication streams before recommending a simple framework for initial action.

Method

A literature review identified current impacts, predictions of climate change and current attitudes and strategies towards sustainability. The opinions of actors within the French and British industries were then sought in order to establish the potential to move towards sustainable ski tourism.

Conclusions

Effective communication is crucial to educating consumers and stimulating demand for sustainable tourism products. At present, there is a general lack of interest in doing so, for reasons of cost and lack of immediate economic incentive. If tourists become interested in sustainability, companies will be forced to implement measures to ensure they meet expectations, but may not see much initial financial reward. However, several companies fear dictating to people when on holiday, meaning a subtle approach must be taken, using 'soft' communication strategies to create a sense of respect for the mountain environment. Guidelines may also have a place but should be tailored to specific localities.

This means that the wider industry must also become involved and take a collaborative approach to sustainable tourism. Websites, representative bodies, print media and events could all be used to promote the message. The British and French industries must also work together more closely. It appears that initiatives on both sides are often established in isolation. Co-operation could encourage sharing of ideas, lower costs and a reduction in the burden on any one player. The interview process indicated a willingness to collaborate which must now be tested. Fortunately, several bodies are seeking to develop sustainability strategies and may provide the fora for discussions. If consumers can be convinced to incorporate sustainability criteria into their choice of destination, rather than cost alone, then companies moving towards sustainability will gain competitive advantage and others will fall behind.

Framework

A simple framework is proposed to encourage consensus among those in the British industry on how to move forward and improve collaboration with French actors. Adoption of cost-effective, simple steps and well-supported implementation within the industry is then necessary before communicating sustainability to the skiing public via various media. This is crucial if the link is to be made between actions in everyday life and long-term impacts on the mountains. Once loyalty and respect towards mountain environments is engendered, it is hoped that the objective of sustainability in ski tourism will be achieved.

Glossary of Terms

ABTOF	Association of British Tour Operators to France
AITO	Association of Independent Tour Operators
CMB	Compagnie du Mont Blanc
DATAR	Délégation à l'Aménagement du Territoire et à l'Action Régionale
DEATM	Direction des Études d 'Aménagement Touristiques de la Montagne
LIFE	European Commission's Financial Instrument for the Environment
FACIM	Fondation pour l'Action Culturelle Internationale en Montagne
FAO	Food and Agriculture Organization (of the United Nations)
FCO	Foreign and Commonwealth Office
FTO	Federation of Tour Operators
ICCL	International Council of Cruise Lines
IFTO	International Federation of Tour Operators
IH&RA	International Hotel & Restaurant Association
NGO	Non-Governmental Organisation
NTO	National Tourist Office
SCoGB	Ski Club of Great Britain
TGV	Train de Grande Vitesse
TOI	Tour Operators' Initiative
UNEP	United Nations Environment Programme
VISIT	Voluntary Initiative for Sustainability in Tourism
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council

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Chapter 1: Introduction

1.1 Introduction

This section will introduce the concept of sustainable tourism and the role of the ski sector within it. The focus, aim and objectives of the project will then be established.

1.2 The Concept of Sustainable Tourism

The 1987 report 'Our Common Future' prepared by the World Commission on Environment and Development created the generally accepted definition of sustainable development as '(meeting) the needs of the present without compromising the ability of future generations to meet their own needs'.

The WTO applies this approach and adapts it to define sustainable tourism development as:

'(meeting) the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems.'

The principles can be elaborated as follows:

- Natural, historical, cultural and other resources are conserved for future use while still bringing benefits to present society
- Tourism development is planned and managed so that it does not generate serious environmental or socio-cultural problems in the tourism area
- The overall environmental quality of the tourism area is maintained and improved where needed
- A high level of tourism satisfaction is maintained so that the tourist destinations will retain their marketability
- The benefits of tourism are widely spread throughout the society
- Sustainable tourism has political support and commitment

1.3 Why Ski Tourism?

Ski tourism is a large and important sector of the British outbound and French inbound tourism industries with a UK market estimated at 1,081,000 tourists in the 2004/5 season. (Crystal Holidays, 2005).

Ski resorts in France grew over the last fifty years as increasing numbers of people sought to enjoy the elements of escapism available in the mountain environments, the adrenaline of participating in snow-sports and the kudos which has long been attached to taking a snow-based winter holiday. Given its inextricable link with the environment, susceptibility to climate change, the educated nature of its clientele, but current lack of initiatives when compared with other tourism markets, more could be done to raise awareness of the issues. This could create a link between skiers' actions in resort and wider society to demonstrate how they can help tackle global warming and contribute to the long-term viability of skiing itself.

Tourism in France has enjoyed a healthy revenue stream through its snow-sports tourism. However, with ever greater stress placed on sensitive mountain environments and wider global issues posing new problems, the industry in France and elsewhere may need to take a longer-term view of alpine tourism and its responsibilities in the future.

1.4 Aim

The aim of the project is to understand the effects of tourism on the French Alps and establish some simple steps the UK industry can take towards responsible tourism.

1.5 Objectives

The project was organised around certain key objectives:

- 1) Developing an understanding of the alpine tourism industry and its key players and use this to establish the key costs and benefits of winter tourism
- 2) Understanding the cultural aspects of the British ski industry and appropriate communication strategies to encourage sustainable behaviour
- 3) Evaluating the possibility of more extensive collaboration between organisations across the industry
- 4) Analysing the benefits to the UK industry of adopting more sustainable business practices in order to gain short-term competitive advantage and ensure continuing and long term viability for the industry

1.6 Structure of the project

The project was structured around the objectives above. Chapter 2 is a literature review designed to gain an overview of the principles of sustainable tourism, existing guidelines and strategies within the industry and current impacts of tourism on ski resorts.

Chapter 3 describes the methodology used to collect the relevant data from a cross-section of actors in the industry in both France and Great Britain.

Data collection is in the form of semi-structured interviews, the analyses of which follow in Chapters 4 and 5. 4 covers French perspectives on the impacts and potential remedial action, while 5 examines the British outlook.

Chapter 6 provides an overall exploring the opportunities available to encourage more sustainable business practices and the introduction of generally acceptable guidelines for the ski industry to use and promote. This chapter also covers limitations of the project. Finally, chapter 7 provides a summary to the project and suggests recommendations for future work.

Chapter 2: Literature Review/Background

2.1 Introduction

The literature review is designed to set the scene for the project by utilising existing documented research and other available publications.

In order to examine the ski industry and its impacts in France, it is first necessary to provide a brief overview of its structure. The chapter will then go on to discuss documented impacts of skiing in general. Finally, the tourism industry itself will be examined to evaluate who the key actors will be in driving sustainable tourism and what the barriers to doing so are.

2.2 Overview of the British ski market

The most recent analysis of the British market has been published by Crystal Holidays (a subsidiary of the TUI Group and the largest winter sports operator in terms of volume) and incorporates statistics from the season 2004/5. Sources used include tour operators' statistics, AC Nielsen's TravelTrack, British Ski and Snowboard Association data, CAA published statistics, tourist office figures and travel agency feedback. It is extremely difficult to pull together statistics from across the industry, given the disparate sources available, but the report claims the 'figures quoted cannot be taken as absolute but, given the breadth of sources used, are believed to be as balanced and accurate as possible'. (Crystal Holidays, 2005). Given the lack of figures from other sources and the up-to-date nature of the report, it forms the basis of the overview that follows.

The total ski market (note ski includes the whole winter sports market) reached 1,081,000 tourists in the 2004/5 season, a growth of 3.8%. Both the tour operator and independent travel market continued to grow, while the schools market has remained relatively static since 2001.

For the British market, France continued to be the preferred destination, holding 36.1% of market share.

In capacity terms, Crystal and Inghams led the tour operator market, with Thomson, First Choice and Neilson in third, fourth and fifth positions respectively. The smaller, niche operators continued to perform well, while the mid-sized companies were 'squeezed...(and could) neither find nor retain customers' (Crystal Holidays, 2005).

Transport-wise, the no-frills air carrier market's growth curve flattened and the last season saw some reduction in capacity, particularly in Zurich where easyjet discontinued its operation. The charter airline capacity grew by 4,000 (1%) while the scheduled capacity fell by 73,000 (6%), largely due to the partnership between Swiss Air and BA.

The ski market continued to grow, despite the fact that fewer young people were being introduced to winter sports by schools. This seems due largely to the increasing desire to take active holidays (WTO, 2001; Crystal Holidays 2005) and improving awareness of the need to stay fit and healthy. This has stretched to the older demographic which is now skiing later into life.

From the consumer's perspective, there was a move to more specialist operators and independent travel. Customers are now more informed and quality and value are premium (Poon, 1997). Specialisation is seen in terms of specialist operators (big and small), on-line specialists (such as chaletworld.co.uk, skispecialists.com, etc) and specialist products (such as family holidays or particular destinations) (Crystal Holidays, 2005). An increasing number of people are also buying property in ski resorts as holiday homes and permanent residences, augmenting the independent travel market.

The UK holiday market remains competitive and tour operators seek continuously to gain advantage. As Curtin and Busby (1998) noted, 'mass market tour operators are less interested in the sustainability of a destination than in remaining competitive'. However, it is also suggested that there has been a gradual shift from purely price-based competition to a 'more long-term strategic approach to competition' (Klemm and Parkinson, 2001). This considers the whole tourism industry, however, and no reference is made to

the ski industry in particular. Welford and Ytterhus (2004) suggest that this shift is known to be the ideal scenario but doubt whether it has yet occurred and service providers 'have yet to be convinced of a need to...protect (their) environment'. Many in the wider sustainable development field suggest that this is a necessary shift that will integrate societal and environmental factors with the traditional economic. For the good of all in the tourism market, including companies, consumers and destinations, it may be that sustainable tourism is a goal that all tourism should strive to achieve (Clarke, 1997).

Several methods have been used by tour operators to improve profitability. Klemm and Parkinson (2001) suggest that the following have been key: vertical integration of tour operator, travel agent and airline; improved market segmentation and marketing; and building brand loyalty.

The first increases power by taking greater control of the distribution channel. It can be seen by the integration of Thomson and Crystal brands into the TUI Group. With increasing control, they have greater bargaining power with suppliers in holiday destinations and access to British consumers.

The second aligns the operators' marketing mixes to their target markets in order to satisfy demand by different segments. Targeting can 'reflect tourists' personalities, lifestyles and aspirations' (Klemm and Parkinson, 2001). In the ski market, this may be by targeting a desire for freedom and adventure or the need to accommodate families' requirements.

Thirdly, companies in all markets are developing their brands in order to achieve long term competitive advantage. This means not only creating the logo, name, packaging, etc but also developing an emotional link with the consumer. In the winter sports industry this could be portrayed by 'images of performance, dynamism and challenge, and reflect values of competition, rivalry and economic success' (Bordeau et al, 2002). It is cultivating this 'brand bridge' (Alcock et al, 1987) which creates the truly distinctive brand. In fact, as Klein (2000) suggests in her seminal book 'No Logo', across large commercial businesses generally, focus has shifted from the product itself to

the branding of the company selling it. Developing a successful brand takes time, which supports Klemm and Parkinsons' argument that tour operators are becoming more interested in developing long term strategies.

2.3 Impacts on Ski Resorts

There are a variety of impacts affecting ski resorts, some the direct results of tourism, others due to wider regional and global problems, but each need to be addressed by the ski industry as they will have consequences for the industry and its consumers. The issues have been segregated according to their environmental, social or economic features. However, due to the integrative nature of sustainability, there will be connections between different categories and an holistic view should be taken. The list is not exhaustive, but raises the key points found from the existing literature.

2.3.1 Environmental Impacts

Snow in the French Alps has been dubbed 'white gold' due to its extraordinary value to the region. One of the greatest threats to the area and its tourism industry is climate change. Although the debate surrounding the issue of global warming continues, generally accepted scientific opinion now acknowledges the phenomenon. It is not the purpose of this study to examine climate change and the arguments for and against, but given the evidence of glacial retreats over the last century, it will be taken that the warming of the climate is a threat to the French Alps. French ski resorts are at risk whether the changes are short term or permanent shifts in temperature.

Much of the most incisive research in this field has been conducted in Switzerland, Germany and Canada. As indicated by Elsasser and Messerli (2001), if the generally accepted occurrence of climate change is taken, there could be dire consequences for ski resorts globally. It is anticipated that a 300 metre rise in the altitudinal level of snow cover over the next forty years (The Observer, 2004) will lead to an increase in the already considerable use of artificial snow cannons and a move of ski areas to higher, more ecologically sensitive locations. These strategies are described by Elsasser and Messerli

(2001) as 'adaptation: minimising losses, seeking new locations and resources' rather than the longer-term strategy of 'avoidance: correcting mistakes and curing causes of global warming'.

There are several effects of the increasing use of artificial snow. Concerns abound about the intensive use of water, which requires the building of dams and reservoirs in the mountain areas and can lead to lack of water supply for villages in the valleys. There is also a worry about the impact on vegetation. Artificial snow requires temperatures below freezing (often -4°C) to form. It then remains on the ground longer than natural snow at the end of the season, thus allowing less time for vegetation to recover before grazing. Question marks also remain regarding the polluting effect of the chemicals in the snow, but it is now thought that any effects are minimal (Tuppen, 2000).

This water supply problem would be exacerbated by continued decline of the glaciers. In the short term there would be an increase in supply, but this would lead to long-term water shortages (Price et al, 1999).

Issues arise when considering the exploitation of higher altitudes. These areas are more ecologically sensitive and would suffer from the construction of new lifts. In addition, Price et al (1999) note that those 'installations could be under more threat from melting permafrost, destabilisation of rocks and scree and an increase in landslides and mudflows'.

Pickering et al (2004) analysed impacts of winter tourism on the Australian Alps and identified problems of 'trampling of vegetation;...littering; and nutrient enrichment of soils' which are also concerns for resorts in Europe.

There are further problems affecting the flora and fauna of the area. Many animals hibernate during the winter and can be disturbed by skiers. If they attempt to flee their lack of energy and body fat makes them vulnerable to the weather and predators (Simon, pc). Young trees are vulnerable to off-piste skiers as it is difficult to see young saplings and easy to remove the tops of the trees with ski tips.

Access to resorts brings pollution. The development of the infrastructure of resorts has tended not to include the development of the transport system into resort and the expansion of the road network. This means that 'over 80% of visitors to resorts use cars, creating pollution and congestion' (Tuppen, 2000).

The development of new lifts and pistes has long been known to cause problems to the hillside. During construction 'lift pylons and buildings (are) taken onto the site by tracked vehicles and pistes (are) bulldozed onto the mountainside, removing numerous boulders, top soil, and vegetation' (Holden, 1999, Neirinck, pc). The lifts themselves are large consumers of energy, cables can be dangerous for birds in flight and they 'can become scars on the landscape once the winter fun is over' (Mountain Partnership, 2002). However, newer lifts are often more energy efficient, aesthetically designed and one new lift can replace several older ones.

2.3.2 Economic Impacts

Tourism is now so fundamentally important to the French Alps that reduced snowfalls and the following reduction in visits from tourists would be disastrous. Before the Euro was introduced, '10bn Francs were spent per winter season by tourists from outside the region' (Tuppen, 2000). As the French alpine region has moved away from the traditional agricultural sector, its wealth has increased inexorably and has reduced the tendency for its young people to leave the area in search of better-paid work. However, its dependency on one industry is dangerous and there is now 'no real substitute' (Elsasser and Messerli, 2001). Hunter (1996) also suggests that communities already heavily dependent on tourism may be justified in considering the environment after the economy 'where placing a high value on environmental concerns may mean that the well-being of the community is threatened'. Holden goes on to say once this dependency exists 'it is likely that market demand will determine its continuation rather than radical policy decision making based upon environmental concerns.' The counter-argument in the context of skiing may be that as long as smaller resorts rely on a dwindling ski

market, their well-being is challenged regardless. It may be that they require a protected environment in order to diversify into other tourism products or alternative sectors. Large resorts are also acknowledging that tourists now seek pristine environments as part of the holiday experience.

The downside of this income stream is that much still leaves the areas. Foreign tour operators, external resort operators and holiday home owners siphon away much of the profit from the mountains (Price et al, 1999).

If climate change does result in less snow, the demand for skiing would decrease and even the most dedicated skiers would go less often, congregating in areas with more snow (Elsasser and Messerli, 2001). This would mean further financial trouble for the smaller and lower resorts. Certain resorts are already suffering from a combination of high investment in lifts but modest infrastructure and a failure to attract tourists in sufficient numbers. Examples include Val Frejus and Isola (Tuppen, 2000). This allows increasing concentration of capital in the larger resorts and a downward spiral for the smaller ones. The corporate model allows large organisations from outside the region, such as the Compagnie des Alpes, to benefit as they invest and operate some of the largest resorts, while the community model, which involves investment by the local population, suffers (Bordeau, pc). In each case, local involvement can be minimal. In the large resorts companies' investors and management are from outside the region, while in the smaller destinations departmental authorities often take responsibility from the local councils and 'new investment is curtailed' (Tuppen, 2000). As Tuppen goes on to explain, this is still a step away from the state control experienced in the initial development of many resorts in the 1960s and 1970s.

The increasing number of snow cannon to compensate for variable snowfalls bring huge economic costs with them. Initial investment is around US\$600,000 per km with ongoing annual operating costs of between US\$19,000 and US\$31,000 (Elsasser and Messerli, 2001). This causes more problems for indebted smaller resorts and a delicate balance for the larger resorts to strike. They must ensure they compete with their rivals, as the

amount of artificial snow cannon is now considered important by consumers, but they must also consider the prices they can charge for lift passes to fund the development.

The development of new and higher lifts is another economic juggling act. Installation is costly in high altitude areas, largely due to problems of installing into the permafrost (Elsasser and Messerli, 2001). On an ongoing basis, the operation of the lifts can be difficult as rough weather can restrict skiing.

However, despite the above, there is an increasing recognition that there must be a new focus on the environment to complement economic growth, as tourists are after 'unspoilt character' (Tuppen, 2000) rather than the 1970's idea of functionality above all else.

Economically, this puts strain on the resorts, but they must develop lifts, accommodation, aesthetics, etc to continue attracting consumers. The danger of such development is that if tour operators and customers move away from a certain resort, an expensive overcapacity remains (Klemm and Parkinson, 2001).

2.3.3 Social Impacts

It seems that the social impacts associated with tourism in the Alps are less documented. However, there is a good deal of diverse cultural heritage which is at risk.

One of the tenets of sustainable tourism is the participation of the local community in order to retain some sense of ownership. The large resorts operated by single companies tend to neglect the local population (Price et al, 1999). As Holden (1999) suggests, involvement alone may not improve the environmental situation as communities will still want to pursue the economically viable options. Involvement should be supported by education on the environment and 'environmentally benign but economically profitable alternatives'.

A positive impact of the tourism industry has been on employment. Prior to the advent of tourism many young local people left the region in search of work. Now, they are able to benefit from direct and indirect opportunities. On the other hand, the employment available through tourism is 'renowned for its high turnover, anti-social working hours, low pay, seasonal employment, instability and low job status' (WTTC, 2002). It tends also to attract external service providers to become permanent or seasonal residents in mountain resorts (Price et al, 1999). This can disrupt local traditions and the make-up of the local population. If many of these workers are foreign, it can contribute to a loss of linguistic and cultural diversity or even encourage conflict.

'Tourism activities can also disrupt...local cultures' (TOI, 2003) and this may be seen in certain resorts by the bubble in which tourists are kept. There may often be little meaningful contact with local people. 'The 'culture bubble' strategy or product/holiday experience control is an essential part of the mass tour operator's competitive advantage strategy' (Carey et al, 1997) as it encourages loyalty to the operator's brand, rather than the destination itself.

The nature of the ski holiday has been shifting towards 'more frequent but shorter breaks' (Tuppen, 2000) with the advent of cheap, short-haul flights (particularly to Geneva), intense social pressures on time and work and increasing affluence. This is having effects on pollution levels from aircraft and road vehicles transporting tourists to resort more often, but positive economic effects as it means tourists ski for more days and spending longer overall in resort.

2.4 Tour Operator Strategies and Responsibilities

Tour operators are crucial intermediaries. They can 'influence the choices of consumers, the practices of suppliers and the development patterns of destinations' (TOI, 2003). Carey et al (1997) support this and suggest they are 'instrumental in determining market trends and may affect the demand levels for destinations'. As such, their contribution (or otherwise) towards

sustainable, responsible tourism can set the tone for the rest of the industry. The TOI's report makes it clear that it is becoming ever more in the operators' interests to acknowledge their responsibilities and that 'more and more surveys show that customers respond positively to actions taken by operators' (TOI, 2003). Several mainstream and independent operators are now taking the issue more seriously (e.g. TUI, First Choice, Sunvil), but largely in their summer programmes. One of the challenges for the ski industry may be to force itself up the agenda.

To integrate sustainability into the operator's business successfully 'will mean considering environmental, social and economic aspects through the process of developing a holiday package' (TOI, 2003). The key operating areas in which they can do this are identified as: internal management; product development; contracting with suppliers; customer relations; and relations with destinations.

Swarbrooke and Horner (1999) describe the key determinants of tourist behaviour. These include information, disposable income, personal or friends' experiences, interest in particular issues or activities and advice received from the industry, notably tour operators. The last point is particularly pertinent to this study. It implies that the industry as a whole, but particularly tour operators, have a role to play in the dissemination of information that can influence tourists' decisions. It is acknowledged that 'guest education concerning environmental issues is not yet widely practiced in most tourism businesses' but that it can 'enlist the help of tourists in meeting environmental objectives, while potentially enhancing the overall experience of the guests' (Todd and Williams, 1996).

It is then asserted that 'many aspects of a quality holiday are related to the environment' (Swarbrooke and Horner, 1999). However, although two out of three UK travellers think it is important that the tour package is 'specifically designed to cause as little damage as possible to the environment' (VISIT, 2005), for the tourist the link between their actions and sustainability problems is often subliminal. You and Dokhac (2001) claim that this is a paradox as

many tourists want to visit clean, remote places, yet tourism threatens these very features.

The industry has registered some interest in the area of sustainable tourism, but this was initially to address the potential drivers of consumer demand and threat of regulation. However, neither of these has yet materialised as a force. At present it seems that tourism continues to follow a product-led strategy 'when the environmental resources for tourism receive consideration but are secondary to the growth of the tourism sector' (Holden, 1999).

Certain organisations are now working to bring aspects of the tourism industry closer together and much of this is focussed around the tour operators. As mentioned below, the FTO and AITO respectively are bringing the larger and smaller UK operators together in order to create an aura of collaboration and a united front on which to approach sustainability. In addition, the Tour Operators' Initiative, which was launched in 2000, is an international network that 'brings together tour operators who have recognised the urgency of incorporating sustainable development principles into their operations' (TOI, 2003).

As Carey et al (1997) advocate, organisations now need:

'long term strategic planning, higher investments, stronger alliances, accurate customer knowledge, better standards of education, higher quality of 'unique' products/services and overall better value for money than the competitors'.

2.5 Other Key Actors in the Industry and their Strategies and Responsibilities

There are several other types of organisations working in the ski tourism sector. These include accommodation, restaurant and transport providers, websites offering booking and general information services, local tourist offices and town halls, regional tourist boards, etc. In a project of this size it is impossible to cover all of these in depth, particularly as the focus is on the UK-

based organisations. In addition, there seems to be less literature available, given that many of these organisations have specific strategies and approaches to suit their (and their resort's) individual circumstances.

Within the industry at the destination level, the accommodation, restaurant and transport sectors have received the most attention for their greening programmes (Welford and Ytterhus, 2004). Most have focussed on initiatives such as waste reduction and disposal/recycling, energy efficiency and noise reduction, but some are now also encouraging suppliers to embrace more sustainable practices (Todd and Williams, 1996). The TOI's publication (2003) giving examples of best practice indicates that several operators are collaborating with hotel chains and independent operators to conduct audits, report on environmental performance and train staff. However, these are taken from across the whole industry and none relate to the ski industry specifically.

'Service providers need to see the benefits of working together' (Welford and Ytterhus, 2004). These service providers may cover the whole industry, from accommodation and transport suppliers in resort, to sources of information (such as websites) or suppliers of transport (such as no frills air carriers) in the UK. Of course, all of these suppliers are in business to make a profit, but there must soon be a realisation that they must work to protect the environment upon which they all depend.

There is also an opportunity for the destinations themselves to work with foreign markets and organisations to promote themselves more effectively. To date 'individual destinations...frequently take a very low key approach to their own promotion' (Carey et al, 1997).

In addition, there may well be a role for the National Tourist Office (NTO) to 'consider alternative strategies, for example, market intelligence, segmentation, education, etc. in order to improve the suppliers' understanding of the consumer and their intermediaries' (Carey et al, 1997). Specific to the

ski industry, this may well be the case for the smaller, lower resorts which are struggling to offer a winter sports product to compete with the larger resorts.

To date, however, the approach across much of tourism has been 'anthropocentric', meaning 'the view of nature is in terms of its utilitarian value for humankind, and its ethos is centred upon materialism and the pursuit of economic growth' (Holden, 1999). Preferable would be a position of 'strong sustainability', where 'environmental protection must be a precondition of economic growth' (Holden, 1999).

Every stakeholder must recognise their responsibility, particularly regarding the specifics of the destination in question. Once they do, they also take increased 'ownership' of the solutions. Ritchie and Crouch (2000) suggest 'the emphasis on formulating the vision through a publicly driven process based on stakeholder value and consensus' is important in creating a destination's direction. So, rather than large companies dictating the situations and solutions, a network of individual actors can 'integrate their efforts thus creating new partnerships' (Buckley, 2000). Partnerships are emerging as new and powerful methods of approaching sustainability and the winter sports industry is no different.

The industry itself has made several attempts at providing guiding principles. However, each has espoused the benefits of and need for co-operation across the industry, both domestically and internationally. For example, the WTTC published guidance developed from the Rio Declaration on Environment and Development in 1995 (WTTC et al, 1995), even then including several pointers to the benefits of collaboration.

Taken from the guidelines, these include:

- Nations should co-operate to promote an open economic system, in which international trade in tourism services can take place on a sustainable basis

- Protectionism in travel and tourism services should be halted or reversed
- Tourism development issues should be handled with the participation of concerned citizens, with planning decisions being adopted at a local level

Such guidelines tend to be aimed at tourism generally, rather than winter sports in particular. However, the winter sports industry is beginning to embrace the need for educating tourists and others across the industry in general (see, for example, Neilson's attempts in their 2005/6 winter brochure, the Club ARVA group based in Chamonix and the Ski Club of Great Britain's 'Respect the Mountain' guidelines). There are other, more generic guidelines from organisations such as AITO and the WTO, but few have focussed on winter sports holidays market specifically given its relatively small size in the tourism market. One danger of various organisations and companies creating their own guidelines is that the co-operative nature of sustainability is missed and they confuse the tourist.

Other organisations have also attempted to draw together experiences from across the industry, often by convening meetings of various actors. They include the IUCN's Global Mountain Summit, the International Partnership for Sustainable Development in Mountain Regions, the Alpine Convention, the International Center for Integrated Mountain Development, and so on. While it is encouraging that so many organisations are tackling the problem (and it must be borne in mind that they examine far more than simply the developed world's ski resorts), consistency and communication must still prevail. Of course, not all organisations view the issues in the same way. An example could be the recent '4th World Congress on Snow and Mountain Tourism' which took place in Andorra in April 2005. Although it bemoaned the decline of winter tourism and sought new approaches and a culture of innovation to re-invigorate demand across all different markets, no mention was made of sustainability. Instead, the emphasis seemed to be on continued development

and growth (even of the small, struggling resorts) rather than any discussion of diversification or appeal to new markets.

The example principles above indicate that co-operation and inclusivity are pre-requisites for successful sustainable tourism. Given the variety of advice available, it is debatable how much has been embraced by the industry.

There is also widespread acknowledgement that local and regional government must create policies and regulations to facilitate a 'transformation towards sustainable tourism' (Welford and Ytterhus, 2004).

A recent development in the market has been the rise of websites dedicated to areas such as transport, accommodation, snow reports, general information on resorts, job opportunities, etc. These offer a new and exciting medium for communication and have served to take some market share from the tour operators (Crystal, 2005). Several offer information on environmental issues (e.g. Natives, Piste d'hors), predominantly by offering links to environmental press releases. These could offer great potential to provide information at a low cost and offer links to other good work being performed.

2.6 Barriers and Drivers to Embracing Sustainable Tourism

As with any industry, there are barriers and drivers that influence the uptake of sustainable practices. Once again, these are numerous, but an attempt is made to establish those most important to the ski industry.

2.6.1 Barriers

The economic aspect of tourism will always exist (as per the anthropocentric approach described) as tourism organisations are in business for profit (Welford and Ytterhus, 2004). A business will always want to minimise costs, so anything that is new or may jeopardise this may be viewed with scepticism.

There is a need to convince companies and consumers of the importance of sustainability. As Barr (2004) shows, for many people there is a 'value-action gap' where attitudes fail to materialise into actions. Three key explanations are proposed: people are sceptical of political forces implementing sustainable practices (less relevant to the ski industry in France given the lack of legislation); lack of relation to issues; and a feeling that individual actions are insignificant. This creates an issue for the industry. Even if policies are put in place, consumers may not feel inclined to follow them.

There has been no 'paradigm shift' (Holden, 1999) thus far by the policy-makers. Without a push away from the economically-focussed aspects of policy, there will be a lack of urgency for more action by the industry and little legislative focus. In addition, it seems that 'there is a great deal of rhetoric associated with sustainable tourism and rather less guidance on how to operationalise it' (Welford and Ytterhus, 2004).

Sustainable tourism must be 'closely integrated with all other activities that occur in the host region' (Welford and Ytterhus, 2004). This requires close co-operation between a number of different individuals and organisations and an understanding of the costs and benefits associated.

2.6.2 Drivers

Tourism is a service industry. Whinney (1996) claims that any company providing the best service will have a clear competitive advantage. This may be true, be it hotel, tour operator or airline. It has been made apparent that environmental performance and enjoyable holidays go increasingly hand in hand for tourists. Therefore, training staff in environmental practice can go on to 'create customer satisfaction, personal recommendations to improve repeat bookings and decrease marketing costs and enhancement of the bottom line' (Whinney, 1996). At present, tour operators usually operate on low margins ('routinely less than 5%' (Day, 1997)). If consumers could be convinced of the value of booking with a conscientious operator, there may be an opportunity to improve this margin.

There are also economic incentives for other operations. Much improvement in environmental practice in hotels and restaurants, for example, has been driven by the incentive to reduce costs, improve quality of service and facilities, adhere to international standards and increase profit. Once implemented, these positive aspects can make them more attractive to tour operators and their customers. They can also help to raise awareness at both ends of the supply chain. The TOI (2003) and WTO (2001) cite successful examples.

Klemm and Parkinson (2001) also raise the issue of collaboration between local hoteliers. If they can work together to improve standards then tour operators cannot play them off against each other in a price war. The key recommendation from their study is that those managing local destinations should seek to develop relationships with UK-based tour operators.

The industry relies on its surroundings. A 'clean and pristine environment' (TOI, 2003) is one of the main reasons tourists travel. Ski tourists require not only good infrastructure and facilities, but also to escape into a natural environment.

Voluntary action by various actors within the industry can improve reputation and image and develop a brand. This adding of value ultimately 'enables profit margins to be increased' (Klemm and Parkinson, 2001). In addition, the TOI claims sustainable principles can 'create better relationships with suppliers, staff and local communities, increasing their respect as a partner in destinations and limiting the risk of problems or conflicts'. This in turn can lead to:

'increased access to key resources such as capital, the ability to develop products in an increasingly competitive market, and motivated and loyal staff. From a financial standpoint, sustainable practices can also increase revenue and shareholder value, particularly through the generation of more repeat business, acquisition of new clients, cost savings and increased operational efficiency' (TOI, 2003).

However, as Welford and Ytterhus (2004) argue, endless rhetoric and theories will not bring about benefits. Practices must be operationalised.

According to Welford and Ytterhus, 'tourists destroy tourism' due to the over-use of scarce resources. Therefore, industry actors must realise the need to protect these resources, lest they lose that upon which they rely for their business.

In the long term, a more strategic approach may be preferable to the price-based competition in evidence at present. Klemm and Parkinson (2001) claim this is occurring across the tourism industry. There is some evidence to suggest it is happening in certain ski areas (see Welford and Ytterhus' example of Lillehammer), but little evidence is documented regarding the French ski market.

2.7 Examples of Best Practice

Examples exist across the globe of good practice and cover the actions of tour operators and suppliers. However, there is relatively little documentation of good practice related to skiing in Europe. Most of the literature indicates the push for sustainability in North American ski resorts. The National Ski Area Association and Sustainable Slopes initiative are good examples of the industry working together to embrace sustainability. This co-ordinated approach could be emulated in France and be used to promote ideas, educate and raise the profile of the issues. In time, the economic benefits of this promotion may also be realised.

Price et al (1999) cite the Whistler ski resort in Canada as a good example of a collaborative community effort to embrace sustainability. The resort operates the Whistler Resort Association and has its own municipality government. They have introduced various schemes to address environmental and social issues. These include:

'an eco-system based approach to land use (including a protected area network and efficient urban design); environmentally sustainable transportation; efficient water supply and wastewater management; solid waste reduction and re-use; energy conservation; community partnership strategy, local government's role, local business practices, education and research and an adaptive approach to monitoring and policy re-evaluation'

Individually, none of the above seems revolutionary, but the strength of the scheme is its inclusive focus and the co-operation between so many stakeholders. The UK industry could become involved in such partnerships, particularly in the 'quick-fix' areas of energy efficiency, solid waste reduction and re-use and water management, while also improving education and research.

In terms of research, several Swiss studies have been particularly relevant and insightful and set a precedent for the French and British industries and academia to follow.

Welford and Ytterhus (2004) provide the example of Lillehammer rejuvenating itself. It suffered from a downturn in tourism and a number of actors came together to analyse its strengths, weaknesses, opportunities and threats in order to address the problems. Based on this, three projects were created, each of which required networking and co-operation, areas identified as weaknesses. The first covered an eco-certification of infrastructure in the travel and tourism industry to recognise achievements by service providers. The second aimed to co-ordinate public transport services and provide a better transport product for tourists. The third was aimed at aesthetics, clean-up and the visual profile, addressing areas such as painting of buildings, better sign-posting and preventing litter. This project is ongoing but has had several success stories to date.

The WTO and TOI have published a number of reports on best practice across the globe which cover most facets of successful sustainable tourism. They include actions by tour operators, suppliers and industry associations.

However, none is specific to skiing which suggests there is scope not only for more research, but also for a raising of the profile of the ski industry. Given the much larger size of the mainstream summer sun programmes, the more specialist holidays will always suffer to some extent, but it may be down to the ski sector to force itself up the agenda. It is impossible to detail personally-referred, individual cases of good practice across the industry due to limitations of space and time.

The French Government has begun to take a more proactive stance on the environment and sustainability in general. For example, the Ministère de l'Écologie et du Développement Durable has worked with the TOI and UNEP on the 'Sustainable Tourism' report. There are other longer-standing contributions in the French Alps. Tuppen (2000) refers to the initial three protectionist parks (Vanoise, Ecrins and Mercantour) which border several resorts and forbid development within their borders. There are other regional parks (for example, Chartreuse, Vercors and Bauges in the Northern Alps). These are funded largely by the communities within them and aim to conserve the environment.

2.8 Summary

This chapter has sought to utilise existing research to provide an overview of the ski industry in the UK, describe some of the impacts of ski tourism from environmental, economic and social perspectives and establish the strategies of some of the key actors across the industry. It has also attempted to identify some of the most crucial barriers and drivers. In addition, a brief section on existing best practice has been provided.

The UK offers a sizeable market to the French ski tourism industry and, as such, has some capacity to influence developments and initiatives. As can be seen by changes in the way consumers buy their holidays and fluctuations in the low-cost air carrier market, tourism is dynamic, but it continues to grow. The market is still price driven and dominated either by the large tour operators and, increasingly, small, niche companies.

Impacts of tourism have been well documented. Much research has been done (largely outside France) on the economic and environmental aspects of ski tourism. Less research was readily available on the social aspects. It seems that there may be an opportunity for France to undertake more research specific to its own situation.

One of the key issues affecting the ski tourism market is climate change. Concern about this creates further issues through its more immediate knock-on effects (such as building of snow cannons and high-altitude skiing).

Economically, tourism has been a panacea in many peoples' eyes. Indeed, it has transformed the area and provided employment for thousands. However, it has also led to several resorts entering a downward spiral of debt and a reliance on tourism as the only form of income for the area. Until the anthropocentric approach is balanced, change may be difficult.

In social terms, the area now retains many of its young people, who previously out-migrated in search of work. The downside is the often poor quality of the work available. The other key issue seems loss of the Alpine culture. Foreign workers and tourists often operate in 'culture bubbles' and do not integrate with the local population.

Tour operators have a role to play in the issue. Much has been written about their strategies, although little is specific to the ski industry. As intermediaries between customer and destination they can communicate with both. Although heavily price driven at present, it is possible that a shift may take place in the future towards more sustainable, longer-term strategies. However, this will rely on demand from the consumer as much as a willingness to change from within.

The industry covers many other aspects, such as transport and accommodation providers, websites, shops, etc. The research showed the

fragmented nature of the industry and how what a challenge it may be to achieve consensus and co-operation.

There are several drivers and barriers to embracing sustainability. It may take just a few to lead the way and gain some longer-term advantage, but the barriers will be tough to break down, particularly as many are so embedded in the culture and history of the tourism industry.

There are examples of good practice (although most are outside the ski industry), but not many that are documented. Many more resorts may be working towards sustainability, but, if so, it is not well marketed and/or documented. Certainly, there are few (if any) examples of French best practice to provide a lead for others to follow.

Chapter 3: Methodology

3.1 Introduction

The literature review gave an overview of current academic thinking and research in the sustainable tourism arena. This section is designed to describe the research that was undertaken to explore some of these issues.

3.2 Type of Methodology

Carlier and Martinetti (2003) claim that the first projects on sustainable tourism were focussed on physical pressures and 'based on quantitative reports and mathematical formulae'. However, it has become necessary to 'take into account a more qualitative dimension'. Therefore, the research focuses on the collection of qualitative data, given the subjective nature of the aims. It is important to gain a cross-section of opinions from experts and key actors in the field of winter alpine tourism. It was initially envisaged that a quantitative approach could be taken simultaneously to gain the opinions of tourists to ski destinations. However, given the time of year in which research was carried out (making it difficult to collect the opinions of a representative sample of British ski tourists), plus the time constraints of the project itself, it was decided to focus research time on those actors within the industry.

The aim of the project is to understand the British ski industry and what it can do to aid sustainable development and tourism in the French Alps. In order to do this, it was necessary to glean opinions from both Great Britain and France.

The literature review acted as the starting point that highlighted some of the key issues. The following phase of the research involved discussions with French players in the industry in order to understand the problems and impacts from local and regional perspectives. Finally, British actors were interviewed to discover their reactions to the problems discussed in France.

It was felt that a case study approach would be most appropriate. This would allow the broad issues to be examined in a specific setting in order to establish

their relevance. The most accurate way to establish the real, present day impacts was to ask those directly affected, rather than rely on academic text which may be detached or out of date.

3.3 Research Setting

The French Mont Blanc area was chosen as the main focus of the research and the majority of it was conducted in Chamonix. This was due to several reasons, key among them being:

- A history of British visitors. It has been a popular destination for the British since the 19th century. Nowadays, the British own permanent residences in the area, 'second' or 'holiday' homes and are occasional tourists.
- It has a year-round tourist industry, with a focus on extreme sports in the summer. Many other Alpine resorts make over 90% of their profits in the winter. This meant availability of contacts to interview in May and June.
- Existing contacts in the resort. These included personal friends, Ski Club of Great Britain contacts and a favourable response to emails sent from the UK early on in the project when trying to identify the key players. Some other resorts were less helpful and many people within those resorts were unavailable for interview.
- Easy access to other resorts in the surrounding valleys (eg. Les Houches, Samoëns) which would allow me to gain a better overview of the region. It was necessary to use a car to travel around the region as the train and bus service around the area was limited. Donations have been made to plant trees in order to offset the carbon emissions created by both the car (approximately 1000kms) and train travel from the UK.
- Chamonix relies as much as any other resort on the quality of its environment. It cannot afford substantial pollution and littering as the summer visitors arrive to appreciate the valley without the snow that can act to hide the litter in the winter. Much marketing is focussed around

the beauty of Mont Blanc and the variety of activities in the area which utilise the natural surroundings.

In addition to the above, interviews were undertaken with contacts in other resorts and areas. Some of the relevant NGOs, for example, were located in Chambéry and Grenoble.

3.4 Interviews

The interviews were designed to establish the views of some of the key actors within the industry in France and Great Britain.

3.4.1 Interviewees

Potential interviewees in France were identified through the literature review, a search of relevant websites, discussions with the SCoGB and a posting on the European Mountain Forum, a website for those interested in issues affecting mountains across the globe. An encouraging number of positive responses were received from emails and telephone calls. Those who did not agree to participate were sent an email of thanks.

A range of interviewees was required in order to provide representation across different aspects of the industry. For example, environmental and cultural NGOs were contacted (eg. Mountain Wilderness and FACIM), as were tourist offices and town halls, private companies (eg. CMB) and individuals (eg. Simon Norris, proprietor of L'Eden Hotel). Interviews were arranged with several individuals while still in the UK. As meetings were undertaken, more contacts were discovered and further meetings arranged. The full list of meetings/interviewees are included in the Appendices.

Therefore, rather than being random, the sampling strategy was based on a 'non-probability, judgemental method' (Wilcox, 2002).

3.4.2 Design of interviews

When requesting interviews it was indicated that the minimum anticipated time needed would be thirty minutes. This was to ensure an adequate response rate. In reality, several conversations lasted longer than this.

Interviews were designed with simplicity and clarity in mind. The objective was to understand the issues that were important to the local populations. Therefore, the questions were relatively open and respondents were not influenced to address certain concerns. The questions were also kept simple due to the potential language barrier.

The key areas to cover included:

- Structure of the industry and organisation interviewed
- Major impacts of winter tourism (and threat of climate change)
- Ways currently employed or planned to mitigate impacts
- Extent of collaboration between French and British organisations and barriers to this
- Relevance of generic guidelines such as those produced by the WTO

As expected, interviews were often largely concerned with the first three points. This was in keeping with the expectations and aims, as the key to this part of the research was to discover what the local people and organisations believe are the issues facing them.

3.4.3 Style of interviews

The interviews were semi-structured, meaning that there were a number of key questions to address, but that the conversation did not remain rigid or formulaic and respondents could expand on answers and explore other issues if relevant. The initial structure was used to rein back the interviewee if the conversation began to head off at an irrelevant tangent.

The majority chose to be interviewed in French. Responses were then recorded by hand. It was decided not to use a tape recorder as this can often be intimidating and lead to insincere responses and interviewees are often less comfortable knowing their answers are being recorded.

The narrative analysis technique was followed, allowing the interview to emerge as a story and be analysed in its original form. This also maintains the social context in which the data was gathered (Saunders et al, 2003). As Ryan explains, 'conversations are an excellent research methodology for revealing...confines and ambiguities' and 'confirm...whether concerns identified by researchers...are indeed the concerns of those questioned'. In addition, as Tesch (1990) notes, the 'adoption of a more 'interpretivist' approach should not be seen as applying any less analytical rigour'.

3.4.4 Data collection method

The approach was an inductive one, meaning that data was collected without a pre-determined theoretical or descriptive framework (Bryman, 1998) and analysed continuously as the research unfolded. This allowed a good fit to emerge between the social reality and the theory that materialises, participants to better understand the theory as it is specifically related to their input and the 'generalisability' to be tested in other contexts (Saunders et al, 2003).

The research also followed the analytic induction approach which recommends 'examination of a strategically selected case or number of cases' (Saunders et al, 2003). It also lent itself to an emerging 'grounded theory', meaning that a theory could be generated around core themes emerging from the data and, ideally, a saturation point would be reached where data collection fails to reveal new data.

3.4.5 Validity and reliability

It is difficult to establish validity, particularly with respect to qualitative studies where there is little other research to compare. The difficulty with evaluating interviews is that although the same topics are covered, the questions are not

always asked in the same format or order. Therefore, the questions were asked in as simple and consistent a manner as possible in order to maximise reliability.

3.4.6 Critique of the methodology

A literature review forms an excellent starting point for a research project. However, as tourism (including sustainable tourism) is such a dynamic industry, thinking on the subject and developments within it are ever-changing. Much writing on the subject was produced in the 1990's. Although much is still valid, the need for ongoing and current research has been well voiced. With this in mind, much of the literature reviewed may be considered somewhat dated. In addition, several papers are general in nature, or focussed on the summer tourism market. Relatively little is specific to the winter sports market.

The inherent subjectivity of the interviewing technique means that questions are open to interpretation and conversations can follow different paths. Interviewees may also answer less honestly than hoped. For example, they may 'toe a company line' or believe there are certain answers the interviewer wishes to hear.

The lengths of the interviews varied. It was decided not to curtail the longer interviews as the more information that could be gained the better. Sometimes, however, the interviews ran on as the interviewee was particularly interested or knowledgeable in a certain topic. This meant it was difficult to focus on other questions and issues.

The interviews were recorded on paper by hand. This allowed pauses in the conversation in which both parties could gather their thoughts, but also the risk of inaccuracy in recording certain information.

In addition, although the sample was broad given the time available, certain potential interviewees being away on holiday and the difficulty in organising

interviews from the UK, there was always the hope that a more representative sample could be tested.

3.5 Analysis of Results

Tables have been created for both the French and British interviewees to show the main issues identified. This provides a simple visual aid for the reader, acting as a checklist of impacts and indicating which interviewees raised them. A narrative is then provided examining the impacts and implications in greater detail.

Chapter 4: Analysis of French Perspectives

4.1 Introduction

This chapter will consider the research conducted between the 29th May and 16th June in the Rhone Alpes region of France. This should provide insights and perspectives from a number of relevant opinion formers in a variety of organisations, from commercial enterprises, to public sector organisations and NGOs. A list of interviewees and their organisations can be found in Appendix A. The analysis will be organised around the main themes of:

- Impacts of tourism and mitigating measures
- Threat of climate change
- Drivers and barriers to sustainable winter sports tourism
- Extent of collaboration across the industry
- Usefulness of guidelines

4.2 Findings and Analysis

4.2.1 Perceived Impacts

The table below has been designed as an easy-to-use diagram indicating the key positive and negative impacts identified by each interviewee.

In some cases, there is overlap between certain issues. For example, two interviewees identified a lack of respect for the mountain as a problem and used litter as a way to describe this. Waste disposal covers rubbish from accommodation, offices, etc in resort. Lack of integration considers that between foreign visitor populations or foreign seasonal workers (such as Eastern European immigrants or UK tour operator staff) and local French populations. Of course, many more specific issues could be included, but the general headings should incorporate most of the issues raised. In truth there were only a finite number of impacts that came to light.

	Positive			Negative									
	Employment Quantity	Local produce	Revenue	Waste disposal	Little integration, lose culture	Prices of property, etc	Small resorts	Employment Quality/Seasonality	Over-development	Water supply	Transport/pollution	Litter	
V Neirinck	✓	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	✗	
G Faure	✓	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	
C Raih	✗	✗	✗	✓	✓	✗	✗	✗	✓	✗	✗	✗	
C Ponson	✓	✓	✓	✗	✗	✓	✗	✗	✗	✓	✗	✗	
M Dietlin	✗	✗	✗	✗	✓	✓	✓	✓	✗	✗	✗	✗	
J-M Bonino	✗	✗	✗	✗	✓	✓	✗	✗	✓	✗	✗	✓	
I Cleaver	✗	✗	✗	✗	✓	✓	✗	✗	✓	✗	✓	✓	
A Burnet	✗	✗	✓	✗	✗	✓	✗	✗	✗	✗	✓	✓	
B Prud'homme	✗	✗	✓	✗	✗	✓	✗	✗	✗	✗	✓	✓	
B Fonseca	✓	✓	✓	✗	✓	✓	✓	✗	✓	✓	✓	✗	
V July/Franck	✓	✗	✓	✗	✗	✓	✗	✗	✗	✗	✗	✓	

Table 1: Indicates impacts identified by French interviewees

Key: ✓ = issue raised by interviewee

✗ = issue not raised by interviewee

Positive Impacts

A number of positive impacts are identified, focussed largely on the economic aspects of tourism. Several interviewees mention the huge proportion of the area's **revenue** that is earned through tourism. For example, Fonseca asserts that 80% of revenue is derived from tourism in the Gap-Massif des Ecrines region (which encompasses Serre Chevalier and several smaller resorts).

Employment is also mentioned positively in a number of interviews from both economic and social perspectives. When the area relied largely on agriculture, there was a great outflux of young people from the region in search of jobs (Fonseca, pc). Nowadays, young people are more inclined to remain in the area to take up employment. This has the knock-on effect of preserving the local culture. In addition, employment in tourism can help to secure the future of agriculture in the area. This occurs in two ways. As Fonseca (2005)

discusses, local farmers sell much of their **produce** to local restaurants and hotels, as well as direct to tourists through farm shops (a point supported by Ponson), but many also take on tourism-related positions in the winter before returning to farming in the summer. Without this second job, many would be unable to support their families.

Locally-made arts and crafts are also sold in shops in and near resorts. Again this helps to sustain the population economically and culturally.

Negative Impacts

The most frequently raised point is that of property **prices**. Hardly surprising, given its direct and tangible impact on French residents. It is a problem felt keenly across the whole region. Bonino explains that 30,000 questionnaires were sent to residents recently across the Mont-Blanc region in Switzerland, France and Italy in order to garner opinion on the biggest problems facing the area. Overwhelmingly, the response was that social and economic problems (predominantly employment and prices) were the most important to address.

A trend across the Alps has been for both foreigners (often the British) and the wealthy French to buy or build property in resorts and, to a lesser extent, in the valleys below. This has resulted in increasing property prices. Local estate agents estimate these to be equivalent to London and Paris prices. For some, this has been positive. Those owning properties in the region have been able to charge a premium for their assets and profit well. However, for those without properties (and particularly the younger generation) this has meant an inability to get onto the property ladder or to be able to afford to rent in or near the major resorts. Smaller resorts are experiencing similar issues, with places such as St Foy and Samoëns becoming colonised by those from outside the area. In addition to the lack of affordable housing, resorts often become 'ghost towns' for much of the year. Many people buy property as a holiday home and use it only for two or three weeks a year resulting in the local shops and businesses struggling for custom and the resorts themselves lacking atmosphere. The problem becomes even more apparent in summer,

particularly as many resorts are purpose built for the winter (Morris, pc). However, the author noticed this to be the case in the summer in Chamonix as well, despite it being considered a year-round resort.

Another economic problem is that of smaller, lower-lying resorts falling into **debt**. As Fonseca and Dietlin discuss, the smaller resorts are struggling to remain competitive with the larger resorts. The investment they have made in infrastructure is crippling many with debt and they are now seeking assistance from regional authorities (eg DATAR evaluates new projects and funding opportunities) and the state. It is a vicious circle, for if the resort does not maintain its facilities it will fall further behind other resorts, fail to attract skiers and the very industry it relies on will be under threat.

This problem is linked to that of **over-development**, much of which is driven by intense competition between ski resorts intra- and internationally (Neirinck, pc) and the challenge from alternative, long haul 'winter sun' destinations. Several interviewees raise this issue and it has a number of permutations. From the economic perspective, investment in development is costly and can be risky, particularly for smaller resorts. Given foreign tourists and tour operators have little loyalty to any particular resort, if new infrastructure is built and the resort falls out of favour or succumbs to low snow falls, it may well be withdrawn from many operators' programmes. This could be disastrous.

Environmentally, Neirinck points out the amount of disturbance that occurs to the local flora and fauna, the almost irretrievable changes made to the landscape from bulldozing and scraping to create pistes, the eyesores they create (particularly during summer), and the fact that much development is unnecessary. Neirinck and Raih believe that much of the development of larger ski areas is a marketing tool. Few skiers require the areas currently on offer (such as the new link between La Plagne and Les Arcs, now known as the Paradiski area), but the consumer is led to believe that big is better. Much is down to perception. Tour operators believe they need to have more areas and activities to attract customers and achieve the volume-based targets they work towards. Therefore, they market the size of resorts as a major factor in

choosing a ski holiday. In fact, statistics show that the average tourist skis only ten to fifteen pistes per day (Neirinck, 2005, pc). In addition, many claim that it was known that the Paradiski cable car would operate well below capacity before it was built but the project went ahead regardless given its marketing potential (Hardy, pc).

The development of ski lifts at higher altitudes is putting sensitive ecological areas at risk (Neirinck, pc). However, as several interviewees point out (including Ponson and Fonseca), the issue is no longer of new development (as there is little viable space left to exploit and old lifts tend to be upgraded rather than new areas made accessible, often having a positive impact as there are fewer but more energy efficient lifts), but of linking existing resorts. Links between Val Cenis and Termignon and also between Megeve, Flumet and Crest Voland are being considered.

The issue of employment is often considered a double-edged sword. There are potential downsides as well as positives. As with much employment in the tourism industry, much of the work on offer is **low quality and seasonal** (Neirinck, pc). It exacerbates the problem of affordable housing and leaves local workers with few opportunities in the summer (Dietlin, pc). From a cultural perspective, this seasonal work attracts many foreign workers from tour operators' countries of origin, other areas within France and, increasingly, from the Eastern European countries. This can erode the culture of the area as many of the workers do not integrate with the local population. However, the interviewees' responses suggest the benefits of seasonal employment outweigh the disadvantages.

Integration is also rare for visiting tourists. Tour operators provide all the necessary services and this reduces the amount of money and time spent by tourists in the local shops and can create an element of friction between the various populations. If tourists become disorderly after après-ski events the existing friction is augmented.



Plate 1: Evidence of tension in Chamonix Sud

Litter is another environmental and social issue that sprang to mind. As mentioned previously, this is often equated to a lack of respect for the mountain. One popular example were the tonnes of litter found under lifts at the end of each season during the spring clean-up after the snowmelt. Litter disappears under the snow when discarded carelessly allowing people to forget what actually happens to it. This allied to the fact that they are on holiday and feel less responsible than they often do at home means that littering is often guilt-free.

Water supply has become a problem. Resorts are installing many more snow cannon in order to guarantee snow and they now cover approximately 10-15% of the skiable area in France (Neirinck, pc). This is to counter the effects of any decline in snowfall and to help market the resorts as 'snow-sure'. However, the implications are serious. The cannon consume as much water in six months as 187,000 people would use in a year (Neirinck, pc). Combine this with the amount of water needed by resort accommodation, offices, etc and the problem can become acute. Recently, Gap's water supply was cut off due to the over-use of water in the nearby resorts (Fonseca, pc) and the military had to deliver water to a village in the Isère valley as a new reservoir built to capture water for use by snow cannon prevented the water filtering down to the lower valley (Neirinck, pc). Ponson believes that using water from some of the larger reservoirs in the region to supply the water necessary resolves the issue, but others believe the problem is still considerable.

In addition, **transport** and **pollution** were raised as issues, although these cannot be attributed solely to tourism. The increase in air traffic causes noise pollution around airports and air pollution further afield. This is compounded by the low-cost flights from the UK and elsewhere which has increased the number of flights arriving in the region. There is also the problem of the transport of tourists from the airports. This can result in pollution and congestion in the valleys and resorts, particularly on the busy transfer days at the weekends during the winter season. However, Fonseca believes the huge influx of private cars most weekends and during the season from neighbouring regions and countries is a bigger problem for both pollution and congestion. Interviewees in Chamonix highlight their own specific transport problem of heavy goods vehicles travelling through the valley to reach the Mont-Blanc tunnel which accesses Italy. The author experienced the problem when returning from when the motorway had been closed due to high volumes of heavy goods traffic. With the recent fire in the Frejus tunnel, pressure may be placed back on the Mont Blanc tunnel and traffic volumes could rise once more. The effects of the pollution can be seen simply by looking at the glaciers in the valley. Long-time residents claim they have become blacker (and smaller) over the course of the previous few decades.



Plate 2: View of glacier from Aiguille de Midi

Waste disposal is raised by Raih as an issue. Although recycling facilities are available in most resorts, tourists and workers in tourist accommodation often fail to separate their rubbish and dispose of it as general waste. This may be

due partly to a lack of awareness and education and the inconvenience of taking the waste to the recycling facility.

Climate Change

Although climate change is not a problem associated directly with tourism, it is cited by some as a problem facing the industry. Some interviewees raise the issue and its particular relevance to the ski industry. Cleaver, for example, points to the decline in snowfall levels. When he first arrived in Chamonix in 1970, annual snowfall in Argentière (a commune in the valley) at an altitude of 1200m was 14 metres. Now, good snowfall is considered to be 4 metres at an altitude of 2000m. Conversations held with other residents point to the fact that glaciers such as the Vallée Blanche have been retreating for years.

Just as some put this down to the long term effects of climate change, others are loathed to accept it as the sole reason. Ponson believes that the problem could well be a temporary one and stem from a natural change in temperatures. It is a greater problem for low-lying resorts. The higher altitudes will suffer less and thus business should not be altered fundamentally.

It seems, therefore, that there is an element of uncertainty and disagreement between various actors as to the severity and, indeed, existence of climate change.

4.2.2 Mitigating Measures

From an environmental perspective, protected regions are in place to stop development into sensitive areas. Generally, the national parks perform this function well, although Neirinck believes that some of the areas yield to development if the economic business case is compelling enough. Some protected areas' status can be downgraded if necessary. However, it seems that even at state level the development issue is being considered carefully. Fonseca advises that the proposed linkage of Val Cenis and Termignon is now

under consideration by the state. There is also recognition that little high altitude land remains available or appropriate for development (Faure, pc).

Piste development and maintenance is also being undertaken more sensitively. Drivers of heavy machinery are trained to ensure their work is well integrated into the surrounding environment by, for example, ensuring large rocks and stones are replaced in their original positions wherever possible (Cleaver, pc).

Faure also recognises the improvements made in building standards. Builders and architects are now integrating their buildings into the local environment, renewable energy use is more widespread and planning regulations are far tighter. The focus is now on the quality of development rather than the quantity (Fonseca, pc). Even property owners and developers are beginning to realise the benefits of a sound environmental policy, believes Faure, as tourists are increasingly inclined to visit resorts and accommodation that are aesthetically pleasant.

Many local councils are also taking the issues more seriously. Val d'Isère is working towards accreditation to the ISO 14000 environmental management standard which should aid ongoing best practice. The aim is to achieve this by the time it hosts the World Championships in 2009 (Faure, pc). However, economic considerations still seem to take priority in many areas. For example, in St Gervais an environmental clean-up day was held at the same time as promoting an environmentally-damaging quad-biking event.

Specific initiatives are being put in place in Chamonix. For fifteen years the air quality in the area has been monitored. LPG buses are being introduced to provide low-pollution, free transport along the valley between the different villages within the resort. Fifteen years ago, traffic volumes were increasing 2% year on year (Bonino), but the improvements to public transport should help stabilise current volumes. In addition, there will be requests for tourists to leave their cars on the fringes of the resort when they arrive and use public transport to travel around. This will not be compulsory (as it is in Avoriaz, for example), but certainly encouraged.

Recycling bins have been placed in many locations around the resort and composting boxes have been distributed around the town.



Plate 3: Recycling facilities in Chamonix

Both Prud'homme and CMB assert that educational material is also posted at the bottom of lift systems, but the author did not find much evidence of this – if it exists it should be positioned more prominently. Both Bonino in Chamonix and July in Les Houches believe the amount of rubbish collected in spring time is diminishing each year. Bonino realises that more information needs disseminating, but also that mountain users may be starting to realise that part of the experience is to help conserve beautiful spaces.

Dietlin of FACIM indicates that several culturally-focussed projects are underway. In and around several resorts, facilities are being provided by regional councils to be used as 'maisons' to house seasonal workers in order to overcome the problem of high property prices (Ponson, Fonseca, pc).

Regarding the problems facing the smaller resorts, organisations such as DATAR are encouraging them to diversify and offer a variety of activities to tourists rather than relying solely on skiing. This is particularly important if the effects of climate change come to fruition. In addition, regional tourism authorities are helping to market skiing to young children so ensure that the French population continues to ski, as numbers have been falling for many years now.

For the foreign market, Ponson indicates that more marketing has been done to advertise local culture, fêtes, etc in order to create year-round tourist destinations in the mountains. Dietlin believes that more must be done in conjunction with tour operators to encourage certain market segments to think of holidays in the region as 'mountain' holidays, rather than just 'skiing' holidays. Certain tourists, particularly older generations, may then be encouraged to visit the region to enjoy its culture, food, architecture, etc as well as its snow sports. This may also encourage a greater understanding of the area and its problems. Simple things could be encouraged, such as attempting the language or using local shops, as ways to build relationships between tourists and the local population.



Plate 4: Innovative attempt to appeal to a wider tourist market

4.2.3 Drivers and Barriers to Sustainable Tourism

Drivers

There is a potential opportunity for a more long-term outlook on business (Clever, pc). If companies can be persuaded to take the lead it may offer them a competitive advantage when sustainable tourism becomes mainstream.

Resorts themselves could also reap the rewards from becoming more sustainable. Many are developing their own brands and images (see the classic European resorts styling themselves as 'Best of the Alps'). If resorts can build reputations for caring for their environments, it may enable them to compete on more than cost alone, particularly when there is little difference in price between most of the large, snow-sure resorts in France.

In addition, the very fact that they are preserving the environment upon which they rely is a driver.

In Chamonix, the authorities, and tourist office in particular, is defining a long term strategy for sustainable development (Burnet, pc). Prud'homme defines the three key drivers behind this:

- Need to protect and enrich the local environment.
- Need to ensure economic wealth: the resort is promoted across 25 countries and demand has increased 1-2% per year. There is now a need to develop better quality accommodation and facilities. However, there has also been an increase in prices along with the increased demand.
- Day visitors: they must be encouraged to stay overnight.

The Tourist Office has also begun to develop a set of Chamonix-specific guidelines for visitors to the area in order to raise awareness of problems being faced. Their specific nature promotes the individuality of the resort and starts to build a respect and loyalty towards it. Prud'homme believes that they must be specific to the visiting nationalities as they are at different stages of environmental education (the British, for example, are behind the Germans but ahead of the Italians). To stress the identity of the resort, the 'Chamonix identity' is also being created in order to build a sense of place for the resort and encourage more loyalty to the Chamonix brand. The identity covers four main areas:

- Mont Blanc
- Man and nature
- Chamonix as more than just a destination for sport, but also for shopping, culture, etc.
- Fashion and history

There are several qualities inherent in the identity:

- Respect – of the mountain, local people and culture, etc.
- Liberty – the right to freedom on the mountains, the chance to escape strict rules
- Quality – of environment, the experience, etc.
- Multi-cultural – celebrating the diverse population

According to Prud'homme there has been a mixed response from the British industry thus far. Inghams and Blue Travel have registered their interest, but other large operators continue to focus purely on the short term financial aspects of their businesses. Ponson believes that if the British and French could communicate more effectively then they may realise further benefits (for example, a resolution to the ongoing problem of ski schools believing Tour Operators' ski guides to be taking business from them, a problem being dealt with at the EU level). Bonino supports this, claiming that more open communication lines between visitor, tour operator and resort would benefit all involved.

Raih explains that if the British tourist can be educated as to the issues and ways to solve them, then the environmental resource that they utilise on holiday will be preserved. This need to work against climate change and other more immediate problems (such as littering) can be used to convince skiers that the environment and its snow is worth protecting.

There may also be new markets to exploit. Certain sectors may be interested in taking a more rounded holiday (for example, the older generation who are keen to ski, but not for the usual six days) and experience the culture and ambience of the area as well as the skiing. This type of holiday could support the smaller resorts (Dietlin, pc) and offer an alternative to the 'ski hard, party hard' atmosphere of some of the larger resorts. This type of approach could convince certain customers to ask for more than the number of kilometres of piste when considering a destination (Neirinck, pc).

An attitude of environmental responsibility could afford the opportunity to differentiate (Neirinck, pc). At present, the market is driven almost entirely by price. How long this is sustainable is uncertain, but companies offering more than a product based on price may be able to gain an advantage.

Barriers

The key barrier to implementing sustainable tourism was identified overwhelmingly as a short term, profit-focussed attitude to business (Cleverer, pc). Tour operators, as the key potential partner, are commercial enterprises concerned with profit and (for the larger players) creating shareholder value. Although this is understandable, the general feeling was that they could be doing more to protect the resource they rely on to derive that profit (Prud'homme, pc).

Education and convenience are further barriers to certain actions that would encourage sustainability. For example, Raih cites the use of recycling facilities. People are often unaware that the facilities exist, consider their locations inconvenient or they may find the signs and directions confusing on the bins themselves. The feeling is that steps towards sustainability must be made convenient and simple for the general public to embrace.

One of the problems with combining sustainable tourism with skiing is that tourists arrive with one purpose in mind: to find and use snow. Along with the laissez-faire attitude that often comes with being on holiday (Simon, pc), this means that it can be difficult to convince holiday-makers of the need to consider the environment.

British holiday-makers are also 'ghetto-ised' to some extent. They are collected from the airport, fed and watered in British-run accommodation, provided with lift passes and taken back to the airport at the end of the holiday (Raih, pc). This prevents them from experiencing any local culture and building a sense of loyalty and attachment to the resort. If they could be encouraged to interact more with the local population, both their holiday experience and respect for their surroundings may be enhanced.

This isolation manifests itself in general attitudes to communication. Ponson believes there is a simple lack of desire for the two sides to speak. British residents and visitors are generally disinclined to integrate and the French businesses often still display protectionist attitudes (Clever, pc). Bonino believes improved communication is crucial and that tour operators have a key role to play.

4.2.4 Extent of collaboration between organisations

With respect to this project, the collaboration between French and British organisations is considered most important, although the question was also asked regarding co-operation within France, the feeling being that if internal collaboration is poor, international collaboration would be all the more difficult.

Within France, the overwhelming feeling is that co-operation has been poor in the past, but is now improving. Cleaver identifies piste development as one such example. When CMB develops or maintains a piste there is extensive collaboration with environmental groups and government ministries to ensure the work is environmentally suitable. Faure explains that collaboration is good between DEATM and the local communities, but even now it could be more integrated. Fonseca argues that co-operation is actually quite strong at present, as the complicated structure of governance demands it. For example, DATAR organises various committees (such as the Comité du Grand Massif) which evaluates various proposals and developments and co-ordinates various organisations. Bonino agrees that there is co-operation at the national, regional and local levels, particularly between NGOs and public bodies (such as the Mayor's office).



Plate 5: Co-operation on infrastructure development between various government levels

There is a similar situation between the British and French organisations. At present, foreign companies, and especially those that function in resort, often operate in isolation. Fonseca believes that there is little expectation of the British industry by the French, but that there could be a role for tour operators to play in the future. Raih and Neirinck, among others, believe there are simple things that could be done to foster a greater feeling of co-operation. For example, resort representatives could host welcome meetings for their guests in conjunction with the Tourism Office, Mountain Guides and Ski School. This would foster good relationships between the companies, improve awareness of all kinds of issues (there could be information on mountain conditions, facilities in the resort and up-to-date weather information), afford the opportunity to distribute material about the resort, environment, events, etc and engage the visitors with the resort. It may also relieve some of the workload from Resort Reps as much of the information they require for the traditional welcome meeting and airport transfer would be readily available from the Tourism Office. This could be combined with initiatives such as that being planned by the Chamonix Tourism Office to hold informative, social events for each nationality. It trialled a 'Russian evening' in the 2004/5 season which was received well. Such events could improve awareness of environmental and cultural issues. Of course, not all tourists will be keen to

attend, but if the events are made attractive enough, a large proportion of the guests may be tempted.

Such improved communication may improve relations. There is often tension brought about by the way in which the two nationalities operate. Raih concedes that the British organisation are sometimes more dynamic than the French and require action more promptly than is sometimes forthcoming from the 'French way'. A greater understanding of each others' cultures and stronger relationships built through the course of a season may help to diffuse this tension. This is true also of the British community in Chamonix, which also often operates independently. Certain long-standing residents are beginning to act as intermediaries, but there is still friction among some sections of the population. Certain bars and restaurants are so focussed on the British market that a non-English speaker cannot order a drink as everything is written in English (Prud'homme, pc). This situation permeates into the tourist market.

Some feel the relationship is a little one-sided. Neirinck believes that the tour operators dictate their requirements to the resorts because they are bringing such volumes of tourists. They demand improved facilities and new developments, but the cost is borne by the local communities with the risk that the tour operators could withdraw from the resort at any time. This may support the case evident from the literature review that a united front among and within the resorts may help them forge a more equal relationship with foreign companies.

Neirinck notes that there are also many other organisations, such as NGOs and tourist offices, doing much more to improve the environments and facilities in resort. If British companies could use this expertise there may be opportunities to improve their existing product offerings, offer new products, provide access to more local events and commodities and educate their guests. This may help improve the holiday experience for certain sectors of the market.

Prud'homme recognises that this co-operation is occurring in some sectors. The large operators still tend to function independently as they have a good knowledge of the resort, but small operators and individuals needing to fill privately-owned chalets are working with the tourist office to market their accommodation.

Ponson recognises that improved co-operation is also possible on the regional and national scales. For example, Maison de la France handles much of the communication with foreign operators and could act as a great intermediary to enable greater co-operation to filter to the local level. As Faure explains, collaboration is improving as each actor in the industry recognises the importance of tourism.

Unfortunately, it is still felt that there is a 'them and us' situation, with foreign and local bodies reluctant to co-operate. Interviewees believe responsibility for sustainable tourism lies with a number of different actors and there is a need for organisations and individuals across the industry to pull together, from visitors, local residents, foreign companies and community organisations to regional and even national government. The diagram below illustrates this:

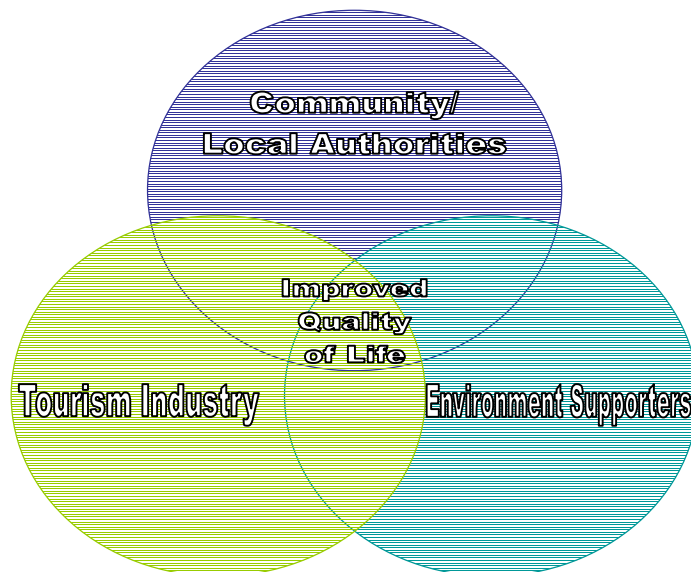


Figure 1: The Tourism Industry, the Environment and the Community

Source: 'Guide for Local Authorities on Developing Sustainable Tourism' WTO

4.2.5 Applicability of Generic Guidelines

There are many guidelines available across the tourism industry designed to encourage sustainability. However, many are generic and do not focus on any particular tourism type. The interviews attempt to establish what, if any, guidelines may be useful to the ski industry. There are several cases in which the interviewee is not aware of any such guidelines, and those who have come across them are generally disaffected, citing their non-specific and generic nature as a downside. As Fonseca points out, their means of communication are not as efficient as they could be. Education in a different form is the key.

Faure believes that labels, such as the ISO 14000 environmental management standard, could be more useful to set resorts on the right track. Eventually, those without the label may fall behind as consumers look for ways to differentiate resorts.

Others, such as Cleaver and Prud'homme, believe that guidelines can be useful, informative tools, but must be developed specifically for a certain destination in order to engage the tourist. Neirinck agrees, particularly due to the nature of skiing and its need for particular infrastructure. However, certain aspects of the generic guidelines could also be transferred (such as information on energy conservation and waste disposal). Dietlin believes Agenda 21 could be particularly easy to adapt, given certain aspects are already specific to the mountains. France also has an existing 'loire des montagnes' (law of the mountains) which is decreed at state level and could act as an excellent framework for resorts to use.

Ponson believes that guidelines certainly have a part to play. They have proved successful in the National and Regional parks and resorts could use their formats for their own purposes. It is difficult to communicate with tourists in resort as they tend to be more relaxed than when at home, but guidelines could be a starting point to encourage better information and education.

4.3 Summary

The results from the interviews help to prove that sustainable tourism is not simply about resolving environmental issues. For some time now, the environmental movement has recognised that to achieve sustainability, economic and social factors must be addressed in addition to environmental ones.

The interviews highlight several key issues, summarised in Figure 2. Of course, there are many issues that could be added, but for the purposes of this study it is necessary to condense and summarise the findings. In addition, certain interviewees are more interested in environmental factors, others in socio-cultural and economic impacts. This was expected due to the diverse nature of the organisations visited, but it allowed an examination of a cross-section of interviews and an insight into the complexity of the subject.

Interviewees are quick to point out the positive economic benefits of tourism. Revenue into the area is huge. According to Hardy, revenue into the tax office in Moutiers is second only to Paris. With the influx of tourists and money comes employment and this has the knock-on effect of retaining young people in the area. It also helps local, traditional industries, particularly farming which now sells much of its produce to the hotels and restaurants serving tourists.

On the downside, prices of property are a major issue. Although this is a function of the market (Bonino, pc), in certain areas measures are being put in place to provide affordable accommodation to seasonal workers near or in resort. However, it is a cause for concern and could be a contributing factor to the lack of integration and (occasional) animosity between visitors or foreign residents and the local population. This lack of integration has an impact on the loss of local culture in the area (Norris, pc).

Environmentally, litter was cited as a huge problem. Simple as it may appear to resolve, there is still a phenomenal amount of littering that takes place during the winter season on the mountainside. Each spring, huge clean-up operations are staged across the Alps to collect rubbish discarded over the

previous six months which appears after the snowmelt. Initiatives are being introduced to combat this, such as more bins at the tops of lifts, educational materials on respecting the mountain and portable ashtrays to encourage smokers to dispose of cigarette butts more sensibly. However, this is a difficult problem to resolve. Not only is it important to appeal to skiers' sensibilities and consciences without appearing didactic, but also appreciate and overcome the fact that they are on holiday and in resort to relax and enjoy themselves.

Over-development is also cited as a problem. For the large resorts this is considered an environmental issue. The development of new lifts can be positive and negative. The introduction of a new lift can replace two or three old ones and be far more energy efficient. However, the installation can disrupt flora and fauna. The maintenance and development of new pistes also brings environmental problems such as disturbing wildlife, scarring the landscape and increasing pollution through the use of heavy machinery. For smaller resorts, the problems can also be economic. As local communities struggle to invest in new lifts and accommodation to compete with the larger resorts, they fall further into debt and seek financial assistance from regional councils. Several interviewees believe that there will be a core of around fifteen resorts in years to come while the smaller, low-lying resorts must diversify to survive.

One of the problems for the alpine region is its overwhelming reliance on tourism. A number of factors could make this a dangerous strategy, something already being experienced by the small resorts. Should climate change take hold and skiing become more difficult, more investment will be needed to guarantee snow and certain resorts will fail. If skiing loses popularity (as it has done with the French) and has to compete with other ski destinations (such as North America) or winter sun options (especially now long haul holidays are relatively inexpensive), competition will become intense and some resorts will lose out. The Alps may have to look at the long-term worst case scenarios in order to guarantee its economic future. Some resorts are beginning to do this and may reap the benefits in the years to come.

There are several drivers behind sustainable tourism. Pushing towards a long term strategy can improve economic performance, encourage loyalty to the resort brand and protect the environment upon which the industry relies. In addition, it may serve to educate people about the issues and help to combat climate change. Resorts that fail to embrace this strategy may fall behind when sustainability becomes part of the equation in choosing a holiday destination.

The main barriers seem to be a concern for economic profit and short-sighted attitudes to the problems being faced. In addition, the complex structure of the industry and historic cultural differences between the British and French obstruct effective collaboration. There is much expertise and many initiatives taking place in the field, but they are not being shared. An improvement in co-operation and communication could go a long way to making sustainable tourism an achievable goal.

Chapter 5: Analysis of British Perspectives

5.1 Introduction

This chapter follows a similar format to the previous. It covers interviews organised and conducted in the UK between 6th July (when a list of contacts had been received) and 2nd August. The interviewees included tour operators, representative bodies, a ski guide editor and website administrators. A list can be found in Appendix B.

The research will focus around the main themes of:

- Perceived impacts of winter tourism and climate change
- Mitigating measures
- Communication and marketing strategies regarding sustainable tourism
- Drivers and barriers to sustainable tourism
- Extent of collaboration between organisations
- Usefulness of guidelines

5.2 Findings and Analysis

5.2.1 Perceived Impacts

The following table shows the positive and negative impacts of ski tourism as perceived by those interviewed within the British ski industry. Again, the list is not exhaustive and is representative of individuals' thoughts, but should indicate the key issues.

	Positive		Negative								
	Employment Quantity	Revenue	Waste disposal	Little integration, lose culture	Prices of property, etc	Small resorts in debt	Employment Quality/ Seasonality	Development lifts, pistes...	Water supply	Transport/ pollution	Litter
Jackie Harris	x	x	x	x	x	x	x	x	x	x	x
Nigel Ragg	✓	✓	x	x	x	✓	x	✓	✓	✓	x
Richard Hartigan	x	x	x	x	x	x	x	✓	x	x	x
Iain Martin	x	x	x	x	✓	x	x	✓	x	✓	x
Peter Hardy	x	✓	x	x	✓	x	x	✓	✓	x	✓
Rebecca Cain	x	✓	x	x	x	x	x	x	x	x	x
Suz Hedges	x	x	x	x	x	✓	x	x	✓	✓	x
Nancy Brock	✓	✓	x	x	x	x	x	✓	✓	x	x
Anonymous	x	x	x	✓	x	x	x	✓	x	✓	x
Nick Morgan	✓	✓	x	✓	x	x	x	✓	x	x	x
Chris Thompson	-	-	-	-	-	-	-	-	-	-	-
Catherine Morris	✓	✓	✓	x	x	x	✓	✓		✓	✓
Simon Norris	✓	✓	x	✓	✓	x	x	✓	x	✓	x

Table 2: Indicates impacts identified by British interviewees

Key: ✓ = issue raised by interviewee

x = issue not raised by interviewee

- = question not posed

Positive Impacts

Unsurprisingly, and similar to the French opinion, positive impacts are economic.

Several interviewees point to the fact that so much **employment** is created and **revenue** contributed that without the industry, the Alps would fall into sharp decline. Ragg also makes the point that the British industry provides a year-round clientele, rather than the peak-time market provided by the French, which is based around the traditional holiday periods totalling around nine weeks per year.

There is a connection here to the **property** issue. Norris notes that property prices have, indeed, risen, but while French holiday home owners tend to retain property for their own use during peak holiday periods, British owners prefer to rent their properties out over the weeks they are not being used by themselves. In this way, property is in use for much of the season (if not the year in Chamonix, given its attraction as a summer resort), ensuring revenue from occupiers of the property is coming into the area for more than just two or three weeks a season. In addition, property vendors receive a premium price.

Negative Impacts

There are a number of issues identified by the interviewees. Not all are direct results of the British industry per se, but the industry in this country does contribute to many of them, along with tourists from other regions.

By far the most regular response was that of ski area **development** and associated environmental problems (see 5.2.2). One respondent (anonymous) explains that much of the development has implications for grazing lands, local species and the aesthetics of the landscape.



Plate 6: The visual impacts of piste and lift development

Transport issues and the resulting **pollution** is another popular topic. The option of creating traffic-free resorts (as has been done in Avoriaz and Les Arcs 1950, according to Morris) is raised. This may be easier in purpose-built destinations, although Chamonix will be contributing in the near future with its

own policies (see 4.2.3), but the problem remains of moving people from the UK to destinations. As Ragg explains, transport is a necessary evil in the industry. Visitors have been encouraged to take the train, but generally prefer to fly, given its ease and low cost. There must also be careful examination of relative levels of pollution from cars, trains and aeroplanes given a recent study by Lancaster University suggesting that taking the TGV may be as polluting as a plane. That is a study outside the scope of this one, but regardless of the pollution levels, the fact remains that tourists do not see the value of taking the train from economic or time-saving perspectives, never mind any environmental factors.

Interviewees recognise the **water supply** problem associated with the increasing use of snow cannon. Hardy explains that the intensive use of water in the cannon results in shortages further down the valley. Ragg describes the lower levels of water visible in reservoirs on the mountainside. Hardy also describes the effects of the artificial snow on the ground and vegetation. It remains on the ground for longer than natural snow and allows less time for the vegetation to recover. This can seriously affect the grazing grounds.

Energy consumption is noted by Morris as another issue. Given the huge numbers of visitors to destinations and the strain on energy resources created by heating buildings during freezing conditions, running lifts and snow cannon, etc, there must be a focus on using energy more efficiently. This is occurring to some extent with more efficient lift systems, but more initiatives could be introduced, such as better insulation of property and education regarding energy use.

The increase in **property prices** is raised as an issue by three respondents, none of whom represented the tour operators and one who lives in Chamonix, possibly as this impact is more tangible for those living in the area year round. Hardy notes that property prices have risen as a result of both (largely foreign) individuals and companies buying up property and it now lies out of reach of the local population. There is a need for subsidised housing for workers, but, although some resorts are making a start, this is not particularly forthcoming.

From a cultural perspective many feel that most of the difficult times are behind the industry. Norris, who lives in the Chamonix area, acknowledges that many of the substantial British population do not speak the French language, but do not need to as it is possible to run businesses and social lives without it. This leads to a **lack of integration** and a 'them and us' situation. Tension still arises from this situation, but the problem is far less acute than it was some years ago. In many other purpose-built winter resorts, this and the issue of foreign seasonal workers is less relevant, as the resident population is relatively small (Morris, pc). As Morris explains, most resorts are designed specifically for the winter season and many workers travel there for that period alone. The local residents who work there gain jobs they would otherwise not have. Seasonality is more of an issue from a revenue perspective when many resorts' incomes decline markedly during the summer months (Morris, 2005).

Ragg and Hedges acknowledge the problems associated with **smaller resorts** in decline. Part of the problem is the decline in the school trip market (largely due to increased insurance liabilities), another is the aspiration of skiers to find evermore extensive ski areas and embrace the sense of journey involved with skiing by visiting areas where they do not have to use the same run twice. Small resorts will have to diversify and find their own USP (unique selling point), perhaps attracting families or older skiers who are less able or willing to spend their entire holiday skiing and desire other attractions. For Ragg, the issue seems more related to the size of the resort and amount of skiable terrain. Hedges sees the problem as a lack of snow at the lower-lying resorts and consequent concentration of skiers at higher altitude destinations.

Hardy and Morris recognise the ongoing problem of **litter**. It is still being discarded carelessly, despite increased awareness and education campaigns in resort and in everyday life. Waste in general could be managed effectively through better, more extensive use of recycling, claims Morris.

Climate Change

Interviewees were asked specifically what impact, if any, they felt climate change would have on their business and the industry as a whole.

Several respondents, such as Morris and Morgan, debate the existence of climate change, pointing to ongoing uncertainty regarding the phenomenon. Morgan acknowledges that Carbon Dioxide has an effect, but that no-one can yet predict how important this will be in the future. However, as seen below, both of their organisations are taking action against it. Several others regard it as a fundamental problem, although there is debate as to whether it is yet affecting the industry.

Brock claims to see the effects already, with snow melting quickly or failing to fall at low levels in Austria. If this continues, it is doubtful that many low-lying resorts will survive. Hartigan claims that the issue is one that will affect the industry in the longer term, with the potential rise in snowlines meaning that only the highest resorts will be able to guarantee snow. With only finite areas into which they can expand, large resorts may struggle to cope with demand (anonymous).

As Cain explains, tour operators will be forced to take a commercial perspective and cut capacity at the smaller resorts if snow becomes unlikely. Alternatively, they may have to take passengers by coach to higher resorts or offer accommodation in low resorts with direct cable car access to the snow (eg. accommodation in Bride-les-Bains with a cable car link up to Meribel).

Cain and others also claim that the problem is not necessarily one of a lack of snow, but rather that snow is falling later. It cannot be guaranteed over the Christmas period, but is far more likely to fall at the end of April and into May than would have been expected a few years ago.

In summary, it seems that there are differences of opinion regarding climate change, similar to those in wider society. However, there is an

acknowledgment that things have changed and will continue to do so. Some believe less snow is falling and that the snowline is rising, others believe only that the winter season is starting and finishing later. The other disagreement is whether the impacts will be long term, or whether they are due to short/medium term changes in weather patterns. Despite these discrepancies, most interviewees acknowledge that something has to be done by society, although the perspectives on their own roles are again mixed. Some are leading the way and taking direct action, others are waiting to see what the real impacts upon their businesses will be before they decide whether measures should be implemented.

5.2.2 Mitigating Measures

Respondents were asked what the industry is doing in resort and the UK to address the problems experienced.

At the local level, resorts can keep areas protected to prevent development and disturbance of flora and fauna (Morris, 2005).

Tour operators can use their communication channels (the key ones having been identified as brochure, website, in-resort staff, welcome packs and tickets, travel information, etc) to raise awareness about the issues to encourage consumers to help work towards more sustainable practices. Some are doing this already. For example, Neilson provides information on responsible tourism in various media, including newsletters, website, holiday guides and in a prominent position in the new brochure. In addition, it distributes posters and leaflets in its chalets. First Choice distributes one ticket wallet with all the information the customers will need for their holiday (rather than sending out several wallets containing different documentation), thereby saving on paper and postage. This form of communication has been identified by Wood (2002) to be of particular use. The pre-holiday information, tickets, etc are read regularly, even up to the point of departure, and can be an effective way of raising the issues before arrival in resort. Other companies

acknowledge that such projects may be possible in the future while some consider them too expensive.

Some companies are taking a lead. Neilson's summer programme has incorporated sustainable practices for some time now (it has had an environmental policy since 1995, and a Corporate Sustainability policy since 2003), and this has been expanded to the winter programme (Brock, pc). Brock believes training of in-resort staff could be an easy, cost-effective way to spread messages about sustainability. A conversation with a Crystal rep in Chamonix and personal experience would suggest this is the case. Sustainability training is currently more established in Neilson's summer programme, but may also be rolled out to the winter programme.

Martin also comments that much more can be done in resort by tour operators to contribute to saving energy. Heating in accommodation (particularly chalets) can be regulated more efficiently by the installation of thermostats and heating systems can be upgraded. Le Ski ensures that thermostats are situated in each room and uses under-floor heating in its chalets which is believed to retain heat more effectively than traditional methods and conserve energy. If the chalet is leased from the owners, then they should be encouraged to make the necessary improvements.

Recycling is another simple contribution. Most resorts now have extensive recycling facilities and companies should be encouraged to use them. If they are located too far from the chalets, then company drivers could do a weekly run to collect recyclables and deposit them (Martin, pc). Le Ski's policy of in-resort recycling resulted in around 20,000 wine bottles being recycled in the 2004/5 season.

There is another role for legislation here. Austrian law dictates that appropriate waste must be recycled and thus companies and individuals are forced to do so.

Naturally, the focus for most operators is to offer the opportunity to ski. Therefore, as Morris and Cain point out, the operators ensure they have operations in most, if not all of the largest and highest ski resorts. In this way they can offer the customer choice and ensure they have guaranteed snow within their holiday programme. It seems this is a reactive measure of containment rather than a proactive measure to combat climate change.

Some organisations, such as Crystal and Le Ski, are working with Future Forests to neutralise the carbon used during travel by customers to and from resort. Future Forests will plant the requisite number of trees to sequester the amount of carbon used on flights. There is a difference between the schemes with Crystal giving the customer the opportunity to pay a supplement on top of their holiday price to pay for the planting of the trees and Le Ski itself paying for each customer's tree planting.

Several tour operators have set up the charity 'The Travel Foundation' to encourage sustainability. Operators such as First Choice contribute a proportion of each booking fee. The organisation has recently produced a DVD for tour operators offering advice on training staff how to communicate these issues (Brock, pc). For skiing, this could be as simple as mentioning the company's recycling policy or pointing out features of the mountain to engender a greater sense of loyalty, respect and understanding.

Neilson has also begun a comprehensive examination of its current supply chain. The initial stages took place last year when a questionnaire was sent to all accommodation providers across the winter programme. Respondents with strong policies will be awarded a logo in the new brochure and it is hoped that those which chose not to respond last year will see the award as an incentive to participate. It also offers consumers a greater choice and an easy method with which to distinguish between suppliers.

There is also a Europe-wide initiative called Tour-Link which brings together nine partners from across Europe. Included is a programme called VISIT, which is establishing a standardised eco-labelling process across the industry.

The advantage of this would be to allow consumers to compare standards. At present, there are forty three separate independent labelling schemes in place across Europe (Thompson, pc). This can lead to the potentially confusing problem of comparing numerous schemes devised by individual organisations.

The FTO has also taken action. It formed a Responsible Tourism committee comprising some of the largest tour operators. It has a statement of commitment from each member and seeks to pressurise suppliers to adopt sustainable policies. It also provides an indication of good practice to tourists, operators and suppliers. Neither is specific to the ski industry and they apply largely to the accommodation sector, but can be applied to a variety of different service providers and adapted to specific sectors (Thompson, pc).

For other organisations, raising awareness is the most suitable approach. The natives website for example, has links to environmental news and sites and news articles on the subject are added regularly. Ifyouiski also contains some information on the issues, but acknowledges this is something that has scope to be developed.

It was also felt by many that there is a huge role to be played by Government at the national level. Legislation is needed, as well as voluntary initiatives, to force individuals and organisations to act. For example, Mark Warner and SkiVal suggested that little is being done in resort at present as there is no incentive. If the legislative situation in France was similar to that in Austria then organisations would comply. Another responsibility for Government is to monitor climate and changing weather patterns so that resorts can make the necessary changes. However, long term global solutions are necessary (Morris, 2005).

Within the UK, many of the organisations interviewed discussed recycling policies. Mark Warner, First Choice and Le Ski all mentioned such projects. Neilson also has an excellent programme in place. It has recently moved into new offices designed to be more energy-efficient. There is a comprehensive recycling policy and several further initiatives. For example, lights in the

façades of drinks machines have been removed, waste paper bins removed from individuals' desks to ensure appropriate bins are used and a policy of switching off lights, computers and other appliances when not in use overnight has been introduced.

It was suggested that other organisations could be involved. Retail outlets with large foci on ski may be able to help by disseminating information and even recycling equipment. Hedges explained that Snow + Rock (the outdoor clothing and equipment retailer) currently accept children's ski clothing to recycle and other stores will sell on outdated ski equipment to Eastern European shops.

However, despite the above, there seems to be a general shunning of responsibility. If the tour operator or other enterprise is not feeling the impacts directly, there is no incentive to become involved in environmentally-friendly practices.

5.2.3 Communication and Marketing Strategies for Sustainable Tourism

At present it seems that little is being done across the ski tourism industry as a whole. Certain organisations are taking a greater lead than others, but there is little unified, concerted effort.

From the interviews undertaken, it appears that there are different levels of commitment per organisation. For some of the largest tour operators it also seems that the summer programmes (as the greatest revenue generators) receive more attention in this field than the ski industry.

AITO and FTO are starting to place more of a focus on skiing. They can act as excellent information sources and provide a united front for the tour operator community.

From those interviewed, Neilson seems to be taking a lead in communicating its sustainability strategy and viewing the area as an opportunity to differentiate itself. Most of its printed material (including newsletters, holiday guides and brochures) contains information on the environment and other sustainability matters, and this is taking more prominent positions. For example, the brochure for 2005/6 has the environmental section positioned on page 22 in the general introductory section towards the front of the publication. Historically, the issues have been confined to the backs of most companies' brochures. The website also contains copies of the Neilson and Thomas Cook environmental policies (although these are focussed on the summer programmes at present) and a link to The Travel Foundation website. In addition, from walking around the office it seems that staff are well informed of the policy and are taking the initiatives on board. Signs are situated in convenient locations to explain reasons for implementing certain practices and the benefits derived. For example, details are posted on soft drinks dispensers explaining the energy and cost savings derived from removing the lights from the façade of the machine. Brock explains that the policy has the support of senior management and of its parent company, Thomas Cook. This is vital to the successful implementation of any such initiative.

Other tour operators have environmental policies in place. Crystal and Thomson operate under the TUI policy, although little is designed specifically for the ski programme. Examination of the 2004/5 season brochures showed that there is little information on the issues. Details of Crystal's project to offer the opportunity for customers to contribute to Future Forests are seen towards the rear of the brochure. It seems that parent company policies are well intentioned, but perhaps they could be better communicated throughout the ski divisions. First Choice, for example, has played a leading role in sustainable tourism and was a founder member of the Travel Foundation. However, the interviewee suggested that there is not much planned for the ski business from a sustainability perspective. If this is the case, the division should be brought into line with the rest of the business. If there is, in fact, work being done in the skiing field, staff should be made aware. Only then will the message be embraced by the company and finally filter through to the consumer.

A key channel of communication is identified as in-resort staff, particularly chalet hosts and resort representatives. On a skiing holiday these employees often have the opportunity to build strong relationships with the consumers. The chalet host spends each morning and evening in the chalet preparing food and usually joins the guests for the evening meal. They often turn to the host for advice on a variety of topics, from weather conditions and the most suitable ski areas to the best bars and 'après-ski' activities. The rep meets the guests at the airport, offering information and advice during the transfer to the resort. They often also provide a ski guiding service during the week, conduct welcome meetings, visit the guests, organise après-ski events and hold regular 'office hours' during which they are available to answer queries. All of these times provide opportunities to inform about sustainability issues in an informal way. It is felt by most interviewees and a current resort rep that training of staff in sustainability could be integrated easily and cost-effectively into the existing training courses.

The interviewees running websites feel that they have a strong medium with which to help disseminate information. Martin explains that the natives website already holds a substantial amount of information and numerous links to environmental web-pages (eg. National Bike Day information). Hedges feels that more could be done on the ifyouski website. Periodically, polls are held to gauge readers' feelings on environmental issues (although it is difficult to determine the validity of results). There is interest in developing an environmental page on the site, possibly with links to the Ski Club's 'Respect the Mountain' web-page. Resort-specific websites such as Chamonet are increasingly popular and provide another avenue.

Hardy suggests that, with new publishers on board this season, 'The Great Skiing and Snowboarding Guide' will be able to incorporate more information on sustainability from next season. The Guide is read by around 70% of the British skiing community and so has the potential to reach a large audience. As the book offers independent advice, is a long-standing publication and is a trusted source of information, it is an important medium.

Newspapers may offer another communication stream by which to raise the profile of the issues. Ragg suggests titles such as The Observer or the Daily Mail may be appropriate, given their associations with the environment and ski industry respectively. Hedges also suggests more use of TV as a strong medium. Channel 4 has broadcast successful programmes on the sport (such as World Cup Skiing and Snowboarding) and could be an exciting way of communicating the issues to a key skiing audience. Ski events, such as The Daily Mail Ski Show, could provide another channel of communication and would access a large number of industry players and consumers.

As with all businesses, there must be tangible benefits which arise from the extra marketing. All strategies will cost something, be it money, time or other resources. The companies must decide whether the benefits are worth the investment. Those which use the issue positively and integrate it into their marketing and company strategies take the initial burden of cost and risk, but could reap the benefits when the consumer realises it is an important issue to take into account.

Several respondents consider the situation one of 'chicken and egg'. Should the tour operator respond to consumer demand for a sustainable product, or make the product available to allow the consumer to make the choice and therefore stimulate the demand themselves? If the latter is preferred, then the leading companies will gain a competitive advantage. This will also be true if consumer demand grows due to outside effects, such as legislation, product offerings from other industries or a general interest due to education and awareness. However, it may be as safe to continue trading unsustainably and adopt new strategies once consumers' attitudes have changed.

5.2.4 Drivers and Barriers to Sustainable Tourism

Drivers

General opinion seems to be divided amongst the interviewees. Some believe that a strategy embracing sustainable tourism will create a competitive

advantage in the short term and are integrating this into their programmes (see Neilson as an example).

Others believe that sustainability will come to the fore in time. Hardy believes that more consumers will begin to make decisions based on more environmental criteria and that investment now will pay off in the medium term. It takes time to develop an effective environmental policy and assimilate it into company strategy. Thompson highlights the following as key aspects of a good holiday:

- Quality
- Good service
- Reliability
- Repeat business

Consumers may not necessarily be aware of a specific environmental policy, but a company which has thought about the impacts of its business is likely to have considered other aspects of its operations and be providing an excellent all-round product. Supporting Swarbrooke and Horner's (1999) claim, Thompson believes many aspects of a quality holiday are related to the environment. Customers may come to expect sustainability to be included in the product and contribute to the holiday experience.

Martin believes there are a small but increasing number of people taking an interest in the issues and it will be increasingly important to influence and inform them. As with many movements, it takes only a few to create momentum and begin to appeal to the mainstream. This momentum may increase more quickly as younger people who are more educated in sustainability are introduced to the sport and eventually book their own holidays. Those companies which have acted positively will have empowered the consumer with a greater choice (Brock, pc). At that point, the organisations with policies and strategies in place will be able to differentiate themselves (Ragg, pc).

The low costs of initiatives such as staff training may encourage adoption of some projects (Cain, pc). For websites, links to other environmental sites and press releases would be low- or no-cost (Hedges, pc). Brock believes that even the more expensive initiatives, such as distributing posters and information in chalets, should not be ruled out on cost alone, certainly for companies with multi-million pound turnovers.

Barriers

The predominant barriers are cost and demand.

As Morris notes, sustainability will be competitive only when consumers prefer one operator due to its sustainability practices. However, at present the market is heavily price-driven, so companies are more inclined to consider their financial bottom lines. Therefore, unless sustainability can be implemented without adding extra costs to the product, tourism will continue to be dictated by offering the best value product. Time will dictate whether environment becomes integrated into the 'value' judgement of consumers. While it does not, operators may not wish to raise the issue for fear of creating a demand and having to assume the costs of integrating sustainability into their strategies. It means that there is no opportunity to maximise the advantage of adopting sustainable practices (Ragg, pc). Hartigan believes this is due to a general lack of awareness about the issues.

Ragg also claims a lack of information means tour operators are not always aware of the best course of action to tackle environmental issues. There should be a reliable source of information which can be used to direct them. These sorts of collaborative initiatives could help the industry in many ways. See section 5.2.6 for more detail.

Martin believes that a lack of legislation is a further barrier. Until there is a tangible reason for people to act, they will be reluctant to do so.

Skiing will always harm the environment: development of ski pistes, building and running lifts, skiing off piste, travelling to resorts, and so on. As Brock says, the sustainability movement is not designed to stop people participating in the sport, but to do so more responsibly. Martin explains that certain aspects are difficult to control, such as the number of people travelling to the region by air, for reasons of cost and time. The difficulty lies in raising awareness of the effects. As with many environmental problems, the costs to the environment are not immediately apparent and are difficult to quantify. Therefore, little connection is made between the action of the individual and the wider problems.

It must be remembered that the holiday experience is ultimately one of enjoyment and escape from everyday life. There is much doubt as to whether the average ski tourist considers the issues at all (Hedges, pc). Cain explains that it may be counter-productive for operators to communicate negative information about skiing holidays. It may scare people away from the sport and impact negatively on the operators' financial performances. Therefore, there is always a balance to strike between educating and informing tourists and allowing them to relax and enjoy themselves. Harris, for example, believes that clients should be left alone once on holiday. They have paid for their trip and deserve to enjoy it as they see fit. Others, such as Thompson, believe that a degree of education and a knowledge that they are helping to preserve the environment can enhance the holiday experience.

5.2.5 Extent of Collaboration between Organisations

Given the fragmented nature of ski tourism, collaboration could play an important part in developing more effective sustainability practices for all involved. This section covers existing and potential co-operation domestically and internationally.

Most organisations in the UK industry are commercial enterprises and there are elements of competition between many of them. This is true of tour operators and also internet sites to some extent. Ifyouiski, for example, is part

of lastminute.com, which is an on-line travel agent. However, despite such competition, there is also scope for collaboration to make business easier for each organisation.

There are several representative organisations representing tour operators. FTO and AITO, for example, run their own Responsible Tourism departments. Morgan also mentions ABTOF as a good source of information for the French market. Such organisations offer superb forums for idea-sharing and an opportunity for tour operators to use them to push forward their own sustainability initiatives, despite the difficulty of representing such a large number of organisations and their various interests (Hartigan, pc). The advantage of presenting a united front is to put more pressure on suppliers to adopt sustainable practices. Currently, implementing change down the supply chain is difficult due to the huge number of service providers (Brock, pc). They may not be concerned about the requests of a single supplier but will be far more likely to act if faced with an organisation representing the majority of their clients and persuading them that investment in the environment will be cost-effective.

Within the UK, Hedges mentions the Ski Club of Great Britain as an effective organisation for bringing members of the industry together and raising awareness of the issues. Its Board contains representatives from across the UK industry.

Collaboration between French and British organisations could be far better. Some interviewees were unaware of any collaboration whatsoever. It is felt that French resorts often accept UK business grudgingly and more could be done to ease the way that business is conducted (Hedges, pc). Morris points to the fragmented nature of the French industry as a problem. Maison de la France, which promotes French tourism in the UK, could be useful, but represents only certain resorts and appears disjointed. There is little cohesive management of resorts and each destination works individually, making it difficult for UK organisations to know the optimum way to approach problems.

Working collaboratively would ensure a more consistent approach across the industry.

Martin notes that collaboration is worthwhile only if done properly. Often individual ways of doing business can achieve desirable results as effectively as a standardised approach. Each organisation can offer a different perspective on doing things.

Morgan suggests that more high profile organisations are needed in the Alps themselves. They should be aware of the problems that exist but also of solutions which are practical given the economic reality of tourism.

Fundamental issues of language and culture can also create barriers (Hardy, pc). As both sides realise the benefits of working together the barriers may fall, but they are well ingrained. He goes on to say that certain French organisations are working towards more open communication and are often taking a lead. It is up to others to follow suit.

5.2.6 Applicability of Generic Guidelines

Guidelines offering advice on sustainable and responsible tourism are on offer from a variety of sources: from industry bodies such as the WTO, to individual companies and organisations, such as SCoGB and Neilson. While it is admirable that attempts are being made, it must not result in consumers becoming either confused or overwhelmed with advice.

Several interviewees indicated that guidelines may be useful building blocks with which to raise awareness and would be easy to incorporate into existing literature, but few were aware of existing ones.

The point was made regularly that guidelines would need to be specific to the ski market, and possibly even to each resort in order to engage each skier effectively. Resorts' tourist offices may have to take responsibility for adapting such information. However, some interviewees believe that guidelines should

remain general in order to cut across the various tourism sectors. Thompson highlights the FTO's 'Preferred Code of Conduct' and suggests it is appropriate for a number of market segments, including skiing.

Thompson also highlights the Europe-wide Tour-Link project which attempts to standardise eco-labels from across the continent. Different eco-labels will have to subscribe to the codes outlined by Tour-Link's 'VISIT' project.

5.3 Summary

This chapter has examined the opinions of several representatives of the ski industry in the UK. It is not exhaustive, but offers a broad enough range of views to establish some of the key issues.

Several impacts are identified. The economic benefits of employment and revenue are recognised by several of the interviewees. On the negative side, the development of pistes and resorts, water supply, transport and pollution issues all figure highly. Other impacts are highlighted, although less frequently. These include littering, loss of culture, prices (particularly of property) and the problems facing small resorts.

Interviewees were also asked their opinions on climate change and its potential impacts on the industry. This met with mixed responses. Some doubt that climate change is occurring at all, while others feel that it will have an impact in the longer term but that there is little to be done at present. Certain interviewees believe that initiatives should be put in place now, but even then it would be too late to stop the effects. Quite rightly, most respondents make the point that the ski industry cannot be blamed for the effects alone, but that the problem is one for wider society to tackle.

It seems that some organisations are putting in measures to combat immediate effects and the long-term threat of climate change. However, this varies between organisations, some being extremely proactive, others claiming that they are keen to get involved but with few practical examples to prove this

is the case. The most obvious policies are UK-based, with several organisations undertaking recycling schemes and adding information to their marketing material and others contributing to sustainable forestry initiatives to offset carbon emissions.

However, there remains a lack of action in the resorts themselves. Even facilities which are provided by the French authorities are often left unused. Recycling areas exist in most ski resorts and tourist offices are beginning to provide free information and tools to tackle some of the problems (for example, the portable ashtrays for use on the mountain), but UK companies seem unaware of the initiatives or disinclined to use them as they are not compelled to by existing legislation. The onus may fall both on the French authorities to promote their initiatives and the UK organisations to be proactive in finding out what is available.

Communication of the issues and the positive aspects of what is being done about them should be communicated to the consumers. As mentioned previously, tour operators' printed material is an obvious route, but also internet sites, newspapers and TV stations could be involved, while trade fairs and ski shows could be used to bring British and French organisations together to push the message (Hedges, pc).

It seems that there is also existing help from organisations in the UK. The FTO and AITO are working on sustainability issues and provide a forum and advice for the tour operators, as do the Travel Foundation and TOI. The European Union runs several projects in the tourism field (eg the VISIT project) and organisations such as the WTO and UNEP provide information and examples of good practice. The Ski Club could also offer a central resource for information specific to skiing.

Several organisations provide guidelines on sustainable tourism, or are working towards them, although many are more focussed on the larger sun tourism market. The general feeling is that guidelines could be useful starting points and an effective means of communication, but they have to be user-

friendly and specific to skiing (possibly even to individual resorts) to be worthwhile. However, any means of raising awareness is considered a positive practice.

In summary, many of the discussions with those in the British industry raise similar issues, largely of the cost of implementing practices and doubts as to whether they are commercially viable at present, although some believe that sustainability can create a competitive advantage over the next few years. Several organisations, particularly some tour operators, talk positively about their intentions or willingness to get involved, but this may well be 'greenwash', with the over-riding feeling being that there was little conviction behind the rhetoric.

A number of drivers and barriers to sustainable tourism are identified. The increasing awareness amongst consumers is a key driver, although there is much speculation as to how widespread concern is. It is felt that benefits may be experienced in five to ten years time, rather than in the immediate future, but that those who invest now will be in a strong position to reap the rewards.

The low cost of implementing certain initiatives and the positive effect they would have on company culture and the environment could also be considered drivers.

Key barriers are cost and demand. Cost is identified as crucial, given most of the organisations interviewed are commercial, profit-making enterprises. The market is heavily price-driven, so any increase in the price of holidays due to costs incurred from sustainability projects may be poorly received.

It is also generally doubted whether the demand for sustainable tourism exists. This throws up interesting questions of responsibility. Is it up to the industry to make consumers aware of the issue and solutions, thereby stimulating demand, or should the consumer be responsible for stimulating the demand after which the industry will react? Do the leaders in the field benefit, or is it better to sit back until the issue becomes unavoidable? Opinion is mixed,

although the majority seem to prefer a fairly reactive stance whereby there is no immediate pressure to introduce potentially costly policies.

Currently, there is some collaboration between British companies domestically, but very little between French and British companies on an international scale. An improvement in co-operation would allow the sharing of ideas and best practice, easier implementation of initiatives and encouragement to both sides of the industry. Improved relations may well also improve the commercial situation and discourage conflict.

Chapter 6: Discussion

6.1 Introduction

This section discusses the opportunities for the ski industry to embrace sustainability more effectively. It will draw together the main themes highlighted by the research and place them in a broader context. Finally, limitations to the project will be considered.

6.2 Overall Summary

The 1 million-strong skiing community in Britain has the potential to influence the adoption of sustainability practices by a number of organisations and contribute to slowing global warming. Skiing and the environment are inextricably linked, as the former relies on the latter for its very existence. Therefore, there is a tangible benefit to be gained by embracing sustainable tourism. By working to halt the rising snowlines and preserve the pristine mountain environments that tourists crave, the industry can help ensure its own long-term viability. However, at present there seems to be disagreement whether sustainability is an opportunity to differentiate and build loyalty or a threat to profitability and a positive, relaxing holiday experience.

The research has shown that ski tourism experiences the same mix of economic, environmental and socio-cultural impacts associated with mainstream sustainable development. Therefore, success in tackling the negative aspects must be via integrated, multi-stakeholder approaches encouraging partnerships and collaboration. This will ensure all facets of sustainability are covered, local populations are not marginalised and existing expertise, research and knowledge is utilised.

Communication of both the issues and the solutions is vital if the problems are to be tackled. It is clear that skiers take their holidays to escape from everyday responsibilities, relax and seek new challenges, but that they also desire a pleasant environment in which to do this. However, the connection between

their activities and the effects on the mountain environment are rarely made. Didactic approaches prescribing actions which will limit tourists' enjoyment of their holidays or appear to chastise them for taking a holiday in the first place fail to work. A more subtle approach, using personal messages and linking tourists' enjoyment of the mountains to their behaviour in resort and at home, allied to simple, practical measures they can take to reduce their impacts are now needed. General advice is less engaging than specific messages. For example, telling tourist to reduce their water consumption is less effective than explaining that a huge amount of water is required to keep snow cannon working and guarantee snow on which to ski. Love of skiing and the mountains could act as the 'hook' to raise interest in the sustainability movement and should become implicit in the sustainable company's marketing, branding and communications.

Communication to consumers at optimum times is crucial. Wood (2002) identifies pre-travel information (ticket wallet contents, etc) as particularly effective as it is consulted numerous times in the build up to the holiday. Ragg explains that resort staff build strong relationships with consumers. If trained, they can use such contact to send the traditional messages of safety, entertainment and so on, but also of respect for the mountain environment. Other media can be used, including websites, shops, travel agents, in-flight magazines, brochures, print media and so on. These may push some of the onus onto the consumer and help stimulate demand for sustainable products. However, once this communication has been made it must be followed by action from the industry, otherwise the rhetoric will be considered 'greenwash'.

The main barrier to action is the lack of immediate financial incentive. Companies must look at the long-term if they are to realise benefits from investment.

Communication across the industry has proved to be another barrier. To date this has been poor for a number of reasons. The industry itself is fragmented, many organisations are in direct, intense competition based on price, there is a lack of awareness of existing initiatives, a history and culture of poor

collaboration between British and French organisations and no one organisation which has managed to pull the industry together in the field of sustainable tourism. The WTO has recognised the importance of communication to the consumer and is hosting a conference on the subject in Latvia in October 2005.

There are opportunities to improve the situation. Several bodies exist which can act to represent the industry as a whole and disseminate information on how to implement sustainability. Key organisations include the FTO and AITO, The Travel Foundation, Tearfund, FCO, TOI and the Ski Club of Great Britain. One of the complaints from the tour operators in particular was that they do not know what action to take and that projects would be too costly. The organisations listed should be able to direct British companies and offer practical help to set them on the way to sustainable policies. They are also in strong positions to liaise and negotiate with relevant bodies in France, such as regional and local tourist boards, NGOs and community authorities. By uniting some of the British companies they can send a cohesive message to the media, suppliers and resort authorities and improve collaboration between several parties. These umbrella organisations would also be able to collate examples of good practice and planned initiatives (such as the Ski Club 'Respect the Mountain' project) and feed the information to their members. Without this organised structure individual companies will find it difficult to make a difference or influence developments abroad.

A unified approach would mean that existing initiatives do not go unnoticed and ideas can be shared. Already there is much happening in the field at all levels. There must be a comprehensive understanding of current good practice, existing research, opportunities for funding, etc. For example, several different organisations are planning eco-labelling schemes, predominantly around the accommodation sector. However, several schemes already exist and Tour-Link (an EU LIFE programme initiative) is attempting to unify them to provide a more consistent message to consumers. Joining this project may reduce the amount of work each company has to do to introduce their schemes, allow them to incorporate existing indicators of improvement

and would empower consumers to make an educated choice about the service providers they choose. One of the concerns evident from past experience is the proliferation of schemes. This happened in the accommodation eco-labelling sector and measures must be taken to ensure the more recent development of destination labelling is more cohesive (Eco-Tip, 2005). If companies are serious about a sustainable strategy, their providers will be chosen on merit and thus will afford the sustainable company competitive advantage.

Research should also be encouraged, used and made available to companies. There is much doubt surrounding the climate change phenomenon. Research has been performed by several organisations in Europe on the dangers of changing temperatures suggesting that ski resorts will suffer rising snowlines over the next forty years. Once companies can be persuaded of the threats to their businesses they may be more inclined to act. Unfortunately, at present there is no central database or single organisation collating this research making it difficult and time-consuming to find. Tourism-specific research is also based largely around summer tourism and conditions in less developed countries. The FTO and AITO are beginning to look at the ski industry and tour operators, travel agents and other NGOs could collaborate. French research institutions such as The Institut de Géographie Alpine are also keen to work with the British industry.

Concerns have been raised about costs. The key to implementing change is to make it in small, incremental steps. Simple initiatives ensure that employees and consumers are not overwhelmed and costs are minimal. Training of staff, use of recycling facilities in resort and improved communication with tourist offices are all simple, low cost ideas. If these are seen to be successful, it may be advantageous to take on more ambitious projects and build a reputation for sustainability.

This may also push the agenda into the skiing public's consciousness. In this way it begins to stimulate the demand for sustainable holidays. Those companies that have invested in initiatives will then benefit and be encouraged

to push home their advantage. Skiing as a business will not die, but it and its consumers can begin to operate in new ways that will be sustainable over the long term.

Large companies must incorporate their ski divisions into the mainstream environmental policies, possibly also providing ski-specific information via relevant communication streams. Most large ski tour operators operate their own websites and skiers will access these when wanting to find out about ski holidays, but few seem to have obvious links to parent companies' websites which is where most of the information about the environment and sustainable tourism is found. It is unlikely that they will first access parent companies' websites and may not even know who the parent companies are (for example, a tourist wishing to travel with Crystal will not first access the TUI website).

Several major tourism companies (such as TUI, Thomas Cook and First Choice) have been leaders in responsible tourism, but the ski divisions have been left behind, possibly due to their relatively small size. Staff must be made aware that they are involved with company-wide projects and be educated as to the benefits. This should include travel agents in some cases (such as the Thomson and former Lunn Poly agents operating under the TUI brand). In this way, sustainability becomes part of the natural way to do business.

6.3 Limitations

The ski tourism area is an extensive topic and demanded focus on one particular geographic area. More time may have allowed a comparative study between countries and a more thorough compilation of best practice. Several issues are facing the skiing regions at present, many of which are intertwined and demand focussed research of their own. Transport and pollution, low-cost airlines and their impact on the trend towards taking more frequent but shorter breaks, in-depth analysis of appropriate communication methods, opportunities for small resorts to diversify, demand for sustainable products in the ski industry, and so on. This study has acted as a pilot, identifying major impacts

as felt by the UK industry and French actors and suggesting areas for further work.

Given the time of year and the timescale of the project, it was impossible to garner opinion from the UK ski tourists themselves. Extensive market research would be of great value.

As shown on the table, several interviews were conducted over the telephone. This is a useful medium, but they are less flexible than face-to-face meetings, limit deeper exploration of subjects and are usually shorter in duration.

Ideally, contacts in the British industry would have been received sooner. Individuals were contacted, meetings arranged and interviews conducted between 6th July and 2nd August.

As expected, several potential interviewees were unavailable at the required times. Projects based on interviews will usually benefit from the maximum number of opinions, but as many were arranged as the constraints of time and geography allowed.

Finally, given the subjective nature of the project, the author's perspectives on the issues may be evident. It is up to the reader to evaluate the outcomes and reach his or her own objective conclusions.

Chapter 7: Conclusions

7.1 Introduction

This section will summarise the UK ski industry's potential to contribute to sustainable tourism in the French Alps. It will provide a framework which could indicate possibilities for future action and give recommendations for further work.

7.2 Summary

The British ski industry has the potential to influence over 1 million people in Britain and encourage sustainable development in ski areas. Given its implicit need for a healthy environment and facing the threat of climate change, it has a unique opportunity to use sustainable tourism to gain competitive advantage. Sun tourism may not be as adversely affected by global warming, as tourists may in fact be happy that temperatures will be higher for their beach-based holidays. Skiers, however, face an uncertain future of less predictable snowfalls and rising snowlines. For those organisations interested in pursuing the sustainable tourism agenda, this may act as a 'hook' to spark the interest of the skiing community. Significant rises in temperature may mean an inability to ski in many areas, necessity to use only the highest resorts, subsequent problems of spatial concentration of skiers and the inherent problems that follow, reliance on inferior quality artificial snow and increasing costs of holidays.

There are a number of initiatives underway at local, regional and national level, many of which may be accessible to the British ski industry. Many are concerned with the local problems and offer simple ways for companies to get involved. Local tourist offices are promoting recycling, traffic reduction methods and anti-littering initiatives. They are also trying to communicate the message that tourists must respect the mountain environment in which they ski. British companies could adopt these strategies as well as implementing strong environmental policies and practices in their UK offices. This will allow the message to filter through to the staff and on to the consumer. The ultimate

aim is for sustainability to be implicit in everything the company does. Best practice from across the industry could be shared via representative bodies.

The framework below suggests some simple steps for the industry to follow to create an atmosphere of collaboration and direction. This unified approach could be taken to the host countries and destinations to encourage further co-operation and local stakeholder engagement.

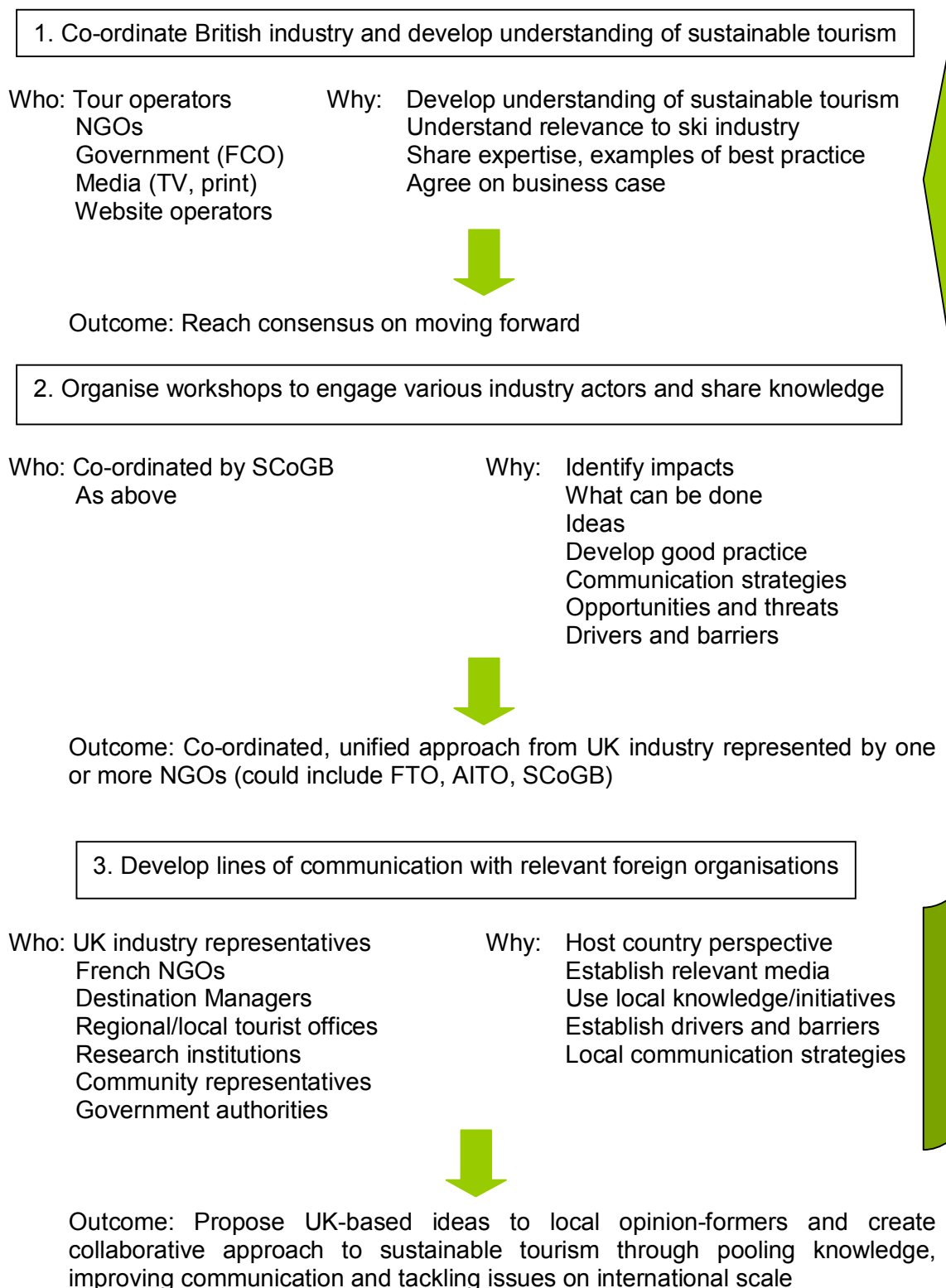
The following are initial steps as covered in the framework and provide the basis for following a sustainability strategy. The key steps are:

- 1) Agree consensus within British industry and establish attitudes of consumers
- 2) Engage local stakeholders
- 3) Research and adopt best practice

This should allow the British industry to understand what consumers and host destinations desire and adopt a unified approach to achieving it.

The first step will allow the British industry to establish why sustainable tourism is important to the ski industry and to undertake market research to establish the level of understanding and demand from the UK consumer. Once the industry is agreed on steps forward (1), local stakeholders must be engaged (2) to ensure the views of the British industry are compatible with local opinion. Best practice must then be identified and appropriate measures adopted by the industry (3). Of course, this could be a lengthy, ongoing process and one which should be under regular review in order to keep up-to-date with new developments and establish the success of implemented initiatives.

Figure 2: Potential Framework for Initial Action by the UK Ski Industry



The framework requires direction from impartial, non-commercial organisations. The SCoGB, FTO and AITO would be potential co-ordinators, particularly as all are currently establishing sustainable ski tourism agenda.

The following steps should then be taken towards implementation:

- 4) Implement and communicate initiatives internally (via intranet, workshops, etc), preferably using senior management as key communicators
- 5) Communicate externally (via websites, marketing material, staff, retail outlets, etc)
- 6) Identify indicators of success for continual review and improvement

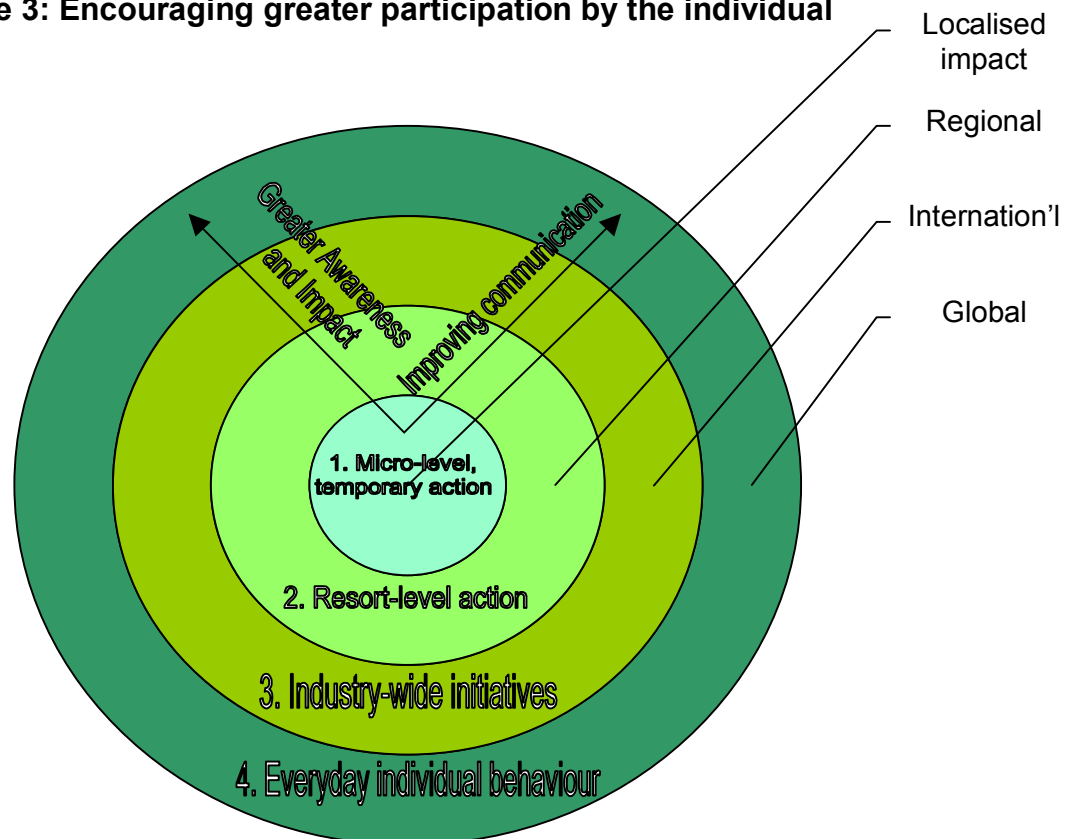
The key to successful implementation is to communicate the methods and reasons for adoption to the staff (4). They may have objections, suggestions for improvement or need for further information. The information must be endorsed by senior management and disseminated throughout the company, so the entire culture orientates towards sustainability. Strategies must then be communicated to the consumer (5). Several methods have been highlighted and can include marketing material, staff and branding. Evoking skiers' love of the mountains and linking it to the threat of climate change and potential lack of snow in the future could be a powerful means with which to alter consumer behaviour in resort. Beyond that it could provoke a stimulus to changing behaviour at home. If skiers can see the tangible impacts of society taking no action on global warming (ie. a lack of skiing for them and their children in the future) it may prove a strong, relevant message to inspire changes in behaviour and support work on sustainable development in wider society. Success, or otherwise of the initiatives must be identified on an ongoing basis (6) by developing indicators and re-assessing consumer attitudes.

The diagram below visualises the levels of action that could be taken to encourage consumers to incorporate sustainable behaviour into their everyday lives. Ultimately, this would have a greater impact on the wider issues and communication would become more effective through the process.

The innermost circle indicates the small contributions individuals can make while in resort, such as conserving water or recycling rubbish. The second circle reflects the resort-level initiatives, such as recycling or communicating

the values of the resort and local community. Thirdly, industry-wide initiatives encourage a larger proportion of the skiing community to re-evaluate their behaviour, perhaps by better promotion of train travel or recycling of ski equipment. Ultimately, provoking more thought about the issues across the ski industry may convince people to think about the future impacts on their ability to enjoy ski holidays and become reflected in their attitudes towards sustainability in everyday life.

Figure 3: Encouraging greater participation by the individual



7.3 Recommendations for Further Work

This pilot study has highlighted several potential areas for further work.

- 1) Numerous companies indicate that there is no desire from ski tourists to travel with sustainable operators. However, it appears that no substantial research has been done into consumer attitudes. This should be performed by an un-biased, objective source covering as wide a cross-section of the skiing public as possible.

- 2) Comprehensive study of NGOs and interested parties in France, plus developing contacts with regional and national government in both France and the UK to establish opportunities for funding and evaluate current initiatives. This could expand to organisations such as the EU, WTO, TOI and Travel Foundation.
- 3) Re-evaluation of communication within the UK industry in order to better share ideas and best practice.
- 4) Research into eco-labelling. Several organisations are looking into their own accommodation labelling (eg. Neilson) and resort/destination labelling (eg. SCoGB). Existing initiatives should be researched and organisations approached (eg. VISIT programme) to ensure consistency and standardisation.

7.4 Key messages

Some key messages have arisen during this project. Much good work is being done in the field, but little is communicated effectively. There are opportunities for development, but a far more cohesive structure must be developed.

- Tourists indicate concern for the environment, but few are aware of their impacts in ski resort and do not make the link between their actions, impacts on resorts and the threat of global warming
- Tour operators and other companies in the industry indicate a willingness to contribute, but the lack of information, perception of cost and limited awareness of simple, low-cost initiatives act as barriers.
- Little co-operation exists between the British and French industries. Collaboration could encourage idea sharing, adoption of available initiatives, enhanced working environment and reduced tension in resorts.
- Small resorts are struggling. There may be an opportunity to develop a new market, perhaps combining skiing with culture and heritage aimed at an older (and growing) target market.
- Guidelines for tourism have proliferated. New guidelines should be simple, specific to resorts (or perhaps areas), require little research on

the part of the consumer and be developed with local stakeholders. This will help to engage both the skiing public and local communities in addition to reducing tension between the two populations.

- Communication to the consumer is poor, despite the huge number of potential communication channels. Existing media must be used more widely and effectively, and less traditional media sought (eg. more use of internet sites, information in shops and at dry ski slopes, etc.). Communication must not be didactic, but inclusive and positive in order to engage the ski tourist.
- More collaboration should be encouraged within Britain and links developed with industry bodies and government to take advantage of the work being done in the tourism sector.

Much good work exists in the tourism sector in general and the ski tourism industry specifically. Much of the information provided by organisations such as the WTTC and WTO is more applicable to developing countries and sunshine destinations. It is up to the ski industry as a whole to adapt this advice and develop its own strategies to push the sustainable tourism idea forward. In years to come, the 'first movers' who have taken the lead should reap the benefits of appealing to an increasingly aware consumer base.

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Appendices

Appendix A: Table to show interviewees' positions and provide a brief overview of the role of their organisations

Interviewee	Role	Organisation	Role
Claire Simon	French Representative	CIPRA – France (Commission Internationale pour la Protection des Alpes)	French arm of the International Organisation for the Protection of the Alps
Vincent Neirinck		Mountain Wilderness	An international movement/NGO for the protection of the mountains
Guy Faure	Director	DEATM (Direction des Études de l'Aménagement Touristiques de la Montagne)	Public-funded organisation for tourism studies in mountain areas. Key clients: the state and local communities
Corinne Raih	Marketing	Savoie Regional Tourism Office	Marketing, advertising and promotion of tourism product for the Savoie region
Claude Ponson	Director	Savoie Regional Tourism Office	As above
Michel Dietlin	Director (Heritage and Development)	FACIM (Fondation pour l'Action Culturelle Internationale en Montagne)	Evaluation of Savoyarde art, culture and heritage
Jean-Marc Bonino	Director of Development	Chamonix Town Hall/Mayor's Office	Controls development, security, transport and municipal services for Chamonix-Mont Blanc
Iain Cleaver	Operations	Compagnie du Mont Blanc	Operates lifts, manages ski areas, runs mountain restaurants in Chamonix Mont-Blanc area
Antoine Burnet	Sales Manager	Compagnie du Mont Blanc	As above
Bernard Prud'homme	Director	Chamonix Tourist Office	Provides information to visitors and promotes the resort
Bernard Fonseca	Commissaire (Head)	DATAR (Délégation de l'Aménagement du Territoire et à l'Action Régionale)	Provides economic support and development for Alpine regions
Vanessa July	Administrator	Les Houches Town Hall	Administration and management of Les Houches
Franck	Customer Service	Les Houches Tourist Office	Promotion/communication to tourists

The French interviews were conducted in person.

Appendix B: Table to show British interviewees' positions and provide a brief overview of the role of their organisations

Interviewee	Role	Organisation	Role
Jackie Harris *	Owner	SkiVal	Small tour operator offering high quality chalets in France and Austria
Nigel Ragg	Head of Marketing	Mark Warner	Medium-sized tour operator running chalet-hotels and mountain restaurants. Particularly strong for families and childcare
Richard Hartigan *	Product Executive	First Choice	Large tour operator
Iain Martin *	Founder	natives.co.uk	Website forum, largely for season workers
Peter Hardy *	Editor	The Great Ski and Snowboard Guide	Definitive guide to resorts across the world
Rebecca Cain *	Product Manager	Airtours	Large tour operator, well known for summer breaks but also a strong winter holiday product
Suz Hedges	Editor	lfyouiski.com	Part of lastminute.com. Offers ski holidays and general information via the website
Nancy Brock	Responsible Business Co-Coordinator	Neilson	Tour operator offering active holidays covering winter and summer programmes
Joe Lynch	Product Manager -France	Neilson	As above
Anonymous *	Product Manager	Leading Tour Operator	
Nick Morgan *	Founder/Managing Director	LeSki	Small tour operator offering chalet holidays at high end of the middle market
Chris Thompson *	Responsible Tourism Co-Coordinator & Industry Support Manager	FTO and Travel Foundation respectively	Representative body of the large UK tour operators. UK charity helping outbound operators operate sustainably
Catherine	Product Manager	Crystal Holidays	Largest winter tour

Morris ^			operator (by volume)
Simon Norris	Owner	Eden Hotel, Chamonix	Independent hotel with restaurant

*Key: * = telephone interview*

^ = written response

No symbol indicates interview conducted in person

NB. In both countries other people were interested in taking part in the project, but for various reasons (away on vacation, work pressures, family illness, etc) they were unable to participate.