

Multi-Season Recreation Planning



Opportunities Beyond Skiing in Mountain Communities

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**A Presentation to the Colorado Association of Ski Towns
August 31, 2012**

Introduction

- SE Group – Founded in 1958
- Primary focus has been mountain resorts and communities
- Multi-disciplinary team – leading the conversation about MSRP at ski resorts in partnership with RRC
- Mark Kane, Director of Community Planning – SE Group
- Melissa Sherburne, Project Manager – SE Group

Goals for Today

- Discuss what is Multi-season Recreation Planning
- Describe what is driving this planning process in general
- Describe the typical steps involved in conducting such a process
- Discuss through two case studies how public and private sector clients have addressed MSRP and how it impacts community planning

Overview

- Over the past 5-6 years we have been actively engaged in MSRP at a variety of “ski areas”
- Municipal recreational areas in the US and Canada have been the most proactive in MSRP
- Traditional destination resort areas have moved more slowly forward
- We see MSRP as a paradigm shift in ski area planning – a move in response to external changes

What is Multi-Season Recreation Planning?

- We define MSRP as *an evaluation process of activities, facilities and programs that are oriented towards recreational/tourism users on a multi-seasonal basis*
- Does NOT just include summer – but a more holistic evaluation of year-round recreational/tourism opportunities
- Starts broadly then narrows through a screening process
- Ultimately it becomes a market-driven, pro-forma based analysis

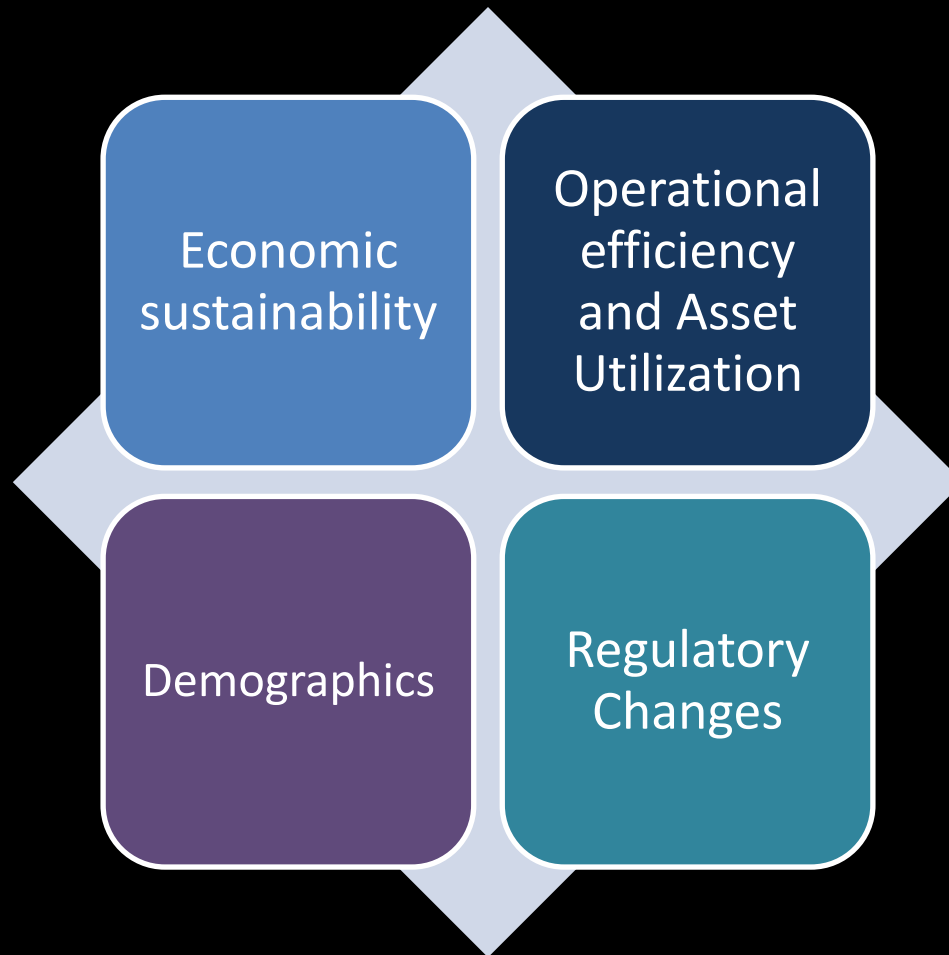


Key trends in MSRP beyond skiing

- New multi-season initiatives are skewing towards recreational “attractions” – gravity rides and activities OR programs
- For some ski resorts it is an attempt to broadening their non-winter base – mountain biking, hiking, etc.
- There is an element of “keeping up with the Joneses” ... in summer/non-winter programming
- No “rubber stamp” answers- each place is unique



What is driving ski industry interest in MSRP?



Driving Issues: Economic Sustainability

- Desire to improve revenue stream in light of stagnating winter skier visitation
- Desire to round-out experience for guests - both winter (i.e. hedge against bad conditions/weather) and summer - and at the same time expand opportunities for revenue generation
- Desire to have a more consistent cash flow throughout the year

Driving Issue: Operational Efficiency

- Leveraging of existing and new facilities
- Desire to better utilize assets of the resorts including guest service spaces, accommodations and food/beverage operations
- Improving year-round employment – keeping good people
- Repurposing of old facilities to serve new functions

Driving Issue: Demographics

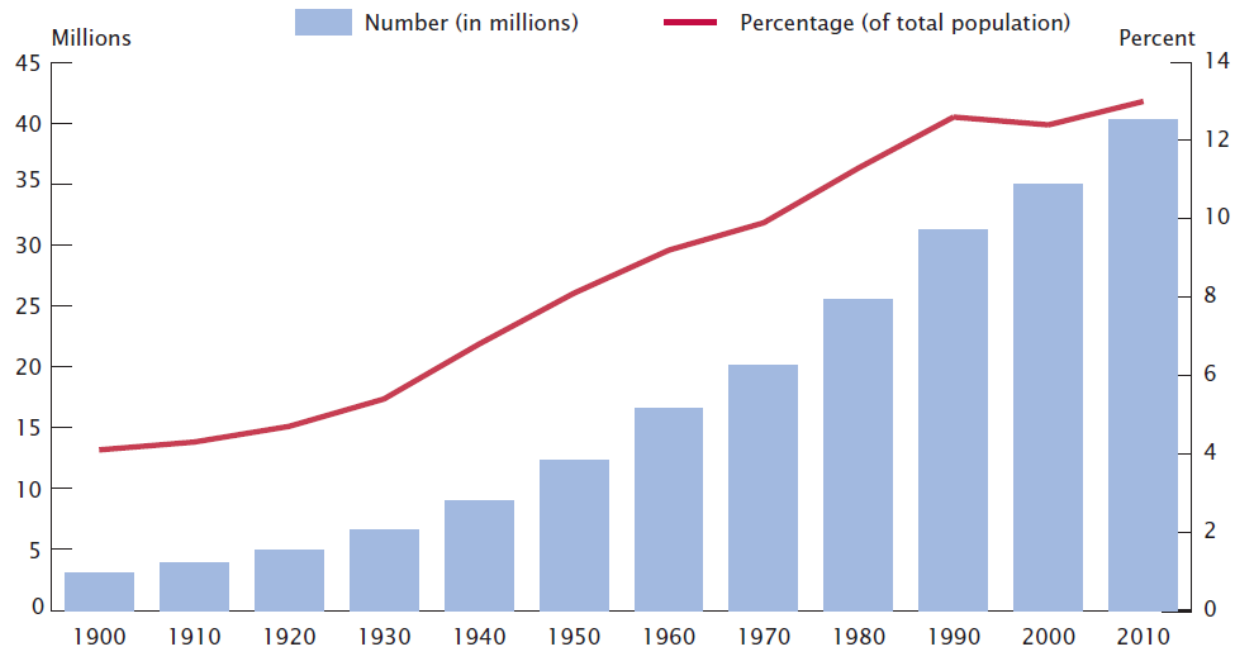
Demographics

- The US Population is gradually aging with about 12.5% above age 65
- This is changing recreation characteristics within many tourism markets

Figure 2.

Population 65 Years and Older by Size and Percent of Total Population: 1900 to 2010

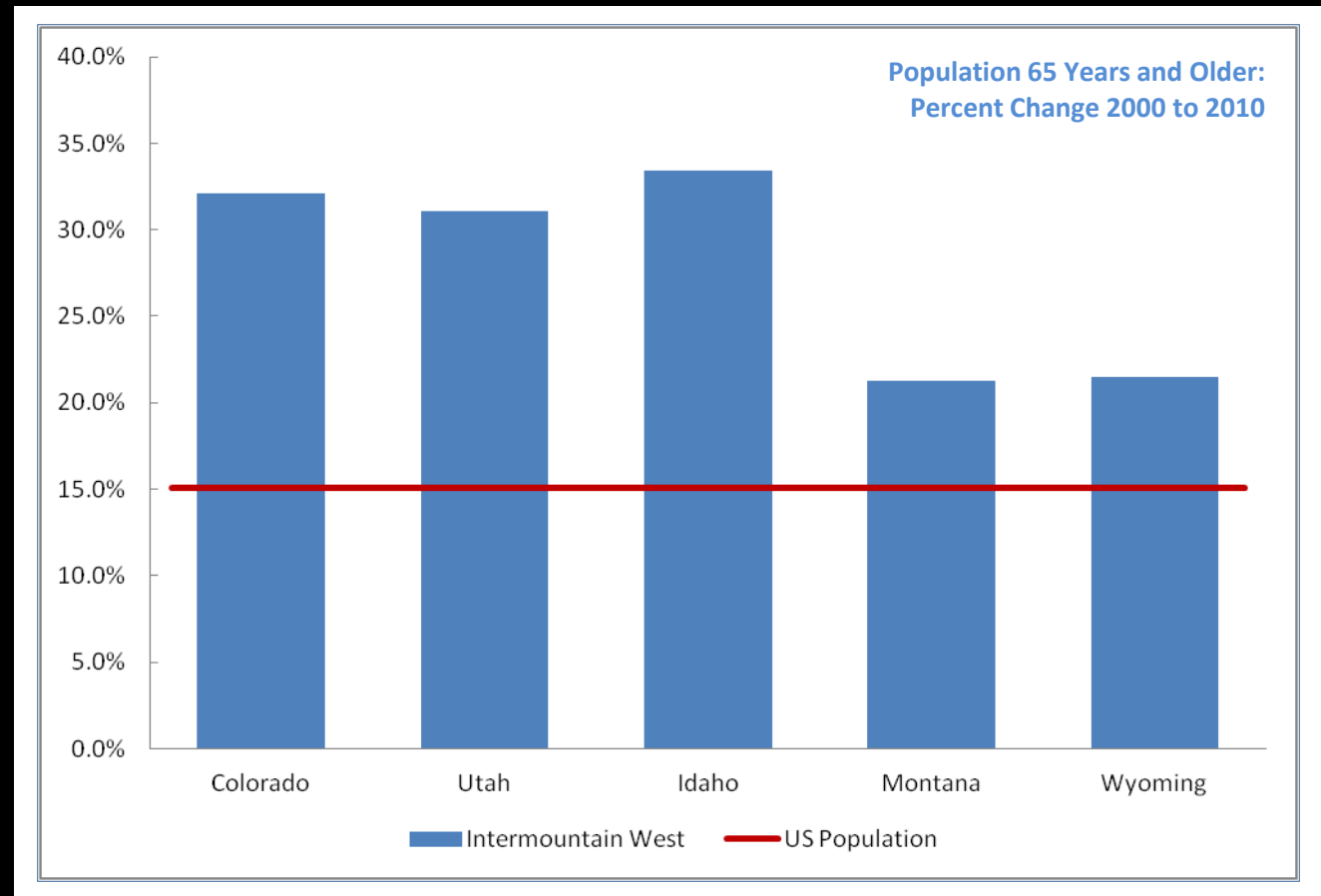
(For more information on confidentiality protection, nonsampling error, and definitions, see www.census.gov/prod/cen2010/doc/sf1.pdf)



Sources: U.S. Census Bureau, decennial census of population, 1900 to 2000; 2010 Census Summary File 1.

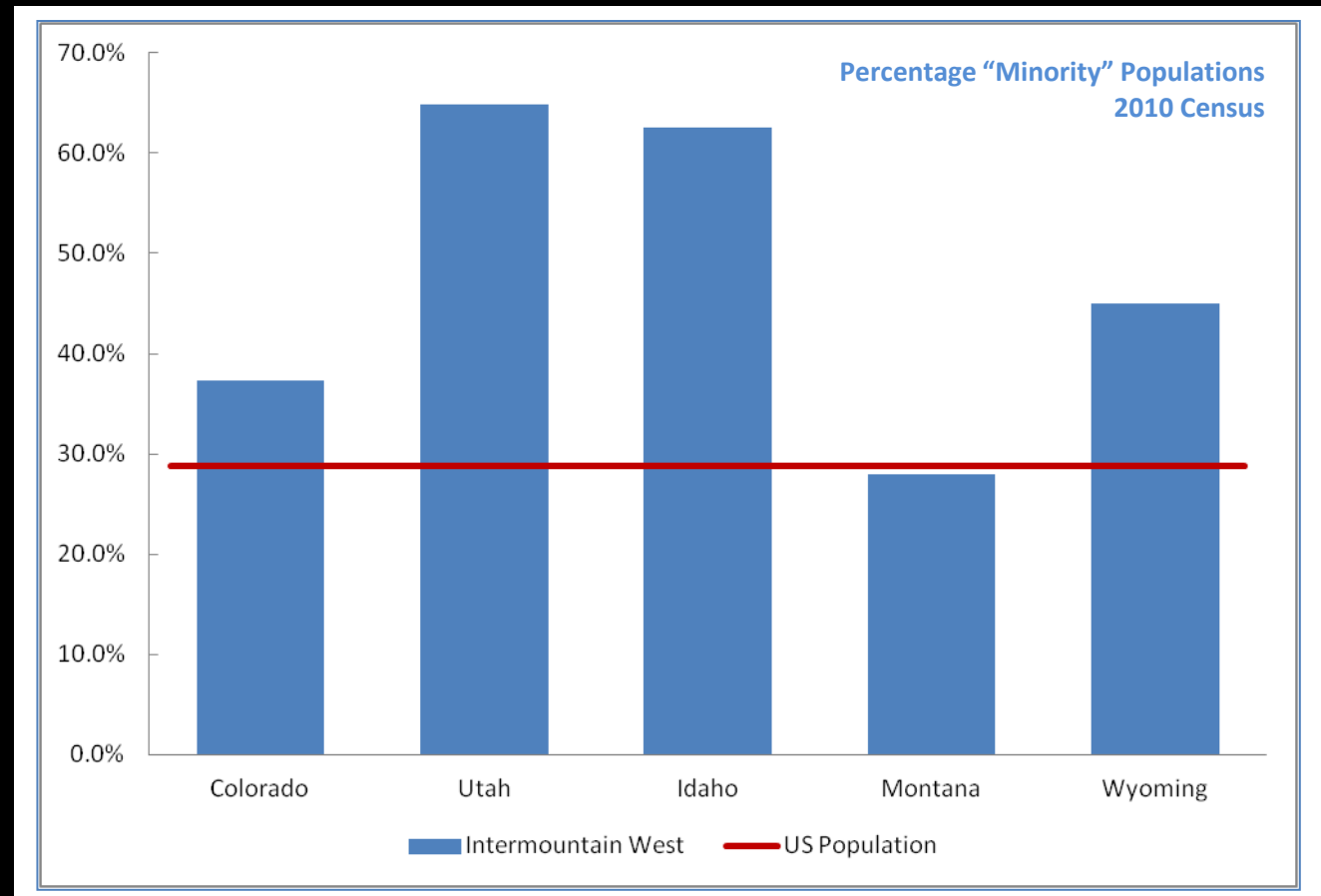
Driving Issues: Demographics

- The intermountain west has seen a significantly higher percent increase in this older population over the past decade than for the United States as a whole



Driving Issues: Demographics

- Along with aging population base is coming a greater cultural and racial diversity within the US population
- Multi-generational tourism is also increasing in frequency

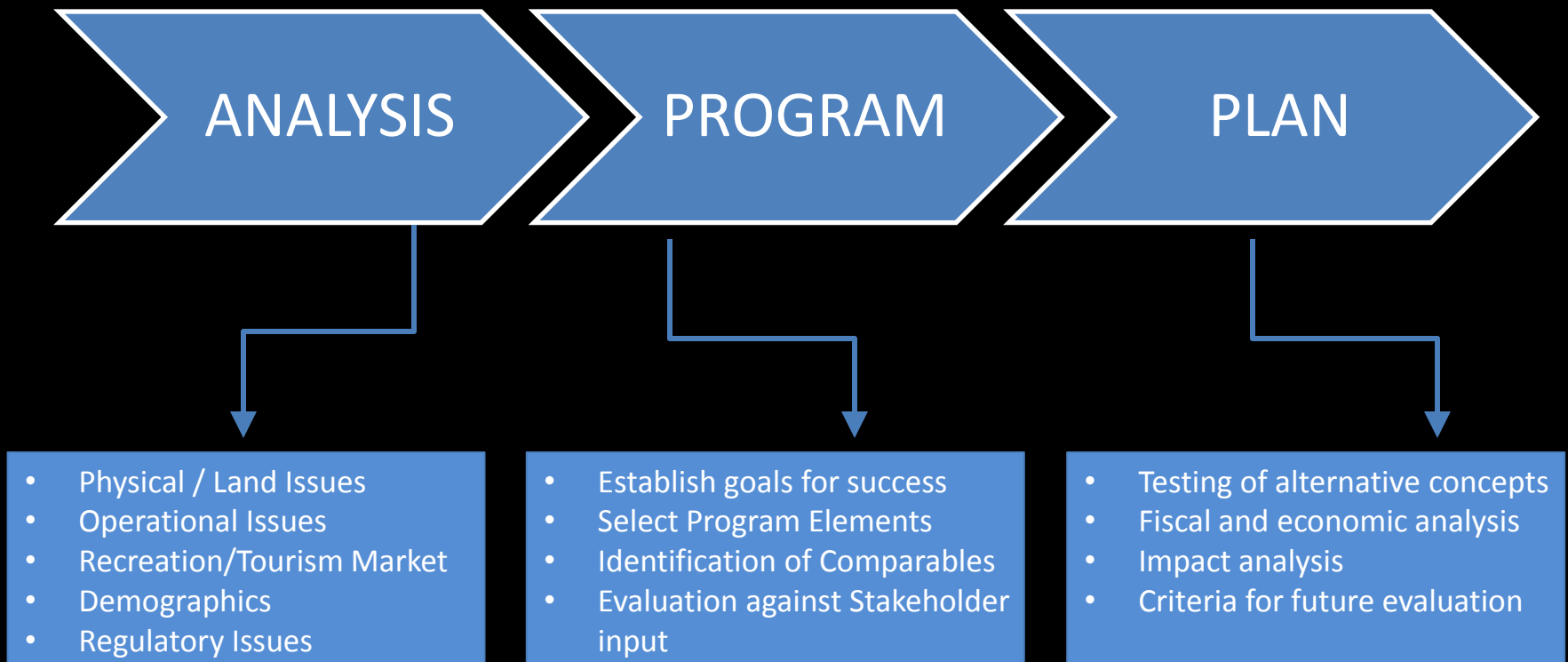


Driving Issues: Regulatory Changes

- Ski Area Recreational Opportunity Enhancement Act of 2011 enable broader array of recreational uses of NFS lands.
- Policies are still be finalized to determine specific criteria for “summer uses”
- Mountain Master Development Plans (MDP) have continued to push forward on non-winter improvements for activities such as hiking and mountain biking.



What are the components of an MSRP process?



Community vs. Resort MSRP

Community MSRP

Focus is on identifying stakeholder/local needs

Transparent and open process that engages community

Establishes a “framework” for future implementation

Financial pro-forma drives phasing

Ski Area MSRP

Focus is on guest/tourist needs

Operationally/Market driven process

Establishes a “roadmap” for future implementation

Developing a business plan

Case Study: Hyland Ski and Snowboard Park

- Located in St. Paul/Minneapolis in Minnesota
- 165,000 annual winter visitors, most of whom are under 20 years old
- Operates as a “special revenue district” within the Three Rivers Park District



Case Study: Hyland Ski and Snowboard Park

- Snow sports was the start – very active, youth snow-sport programs
- Project focus was on **summer and winter** – building upon the idea of an expanded community recreational mission for the Three Rivers Park District
- Demographics was more “local”, but potential user base was determined to include more “unique” visitors AND spectators
- Mall of America is very close – major tourist attraction



Case Study: Hyland Ski and Snowboard Park

- The Preliminary MSRP program included a diverse set of active and passive recreation elements.
 - Canopy tours
 - Geocache
 - Climbing
 - Ziplines
 - Mountain Coaster
 - Summer camp programs
 - Summer events

Table 2: Preliminary Multi-Season Recreation Program

Product/Activity			
Rides/Attractions			
Alpine Slide	Giant Swing	Mini Golf	Trampoline
Bumper Boats	Gyro-Xtreme	Mountain Coaster	Trapeze
Bungee Jumping	Hay rides	Lift Rides	Water Slides
Canopy Tours	Hot Air Balloon	Skate/ Bike Park	Zip Lines
Climbing Wall	Inflatables (Bouncy Castle, Climbing, Slides)	Sleigh Rides	Zorb
Euro-Bungy		Space Bike	
Sports (recreation and leisure)			
Disc Golf	Backcountry Tours	Mapping (Geocaching)	Orienteering
Golf – Driving Range	Badminton	Gym (indoor sports and/or fitness facility)	Paddle Tennis
GPS Treasure Hunt/ Route Mapping (Geocaching)	Basketball	Hiking	Paintball
	Biking	Horseback Riding	Racquetball
	Bird Watching	Horse-Shoes	Rollerblading
	BMX Biking	Ice Climbing	Summer Skiing/Riding
	Boating		Sledding



Case Study: Hyland Ski and Snowboard Park

Lessons Learned:

1. Asset Utilization – needed to upgrade base facilities anyway. As a location within “tourist” market they felt they could leverage more out of the base facilities
2. Dilution of Mission – Does going beyond “skiing” fundamentally change the mission, goals or objectives of the community?
3. Stakeholder “Buy-in” – Do decision-makers “trust” the model? Can they take on the associated “risks”?
4. Adjacency – are those most impacted “on-board” with the changes? Issues of transportation, safety, noise, etc.

Case Study: Stowe Mountain Resort

- Located In Stowe, Vermont – Stowe is one of the premier destination mountains in the Northeast US.
- The area has a vibrant warm-weather tourism climate – Town of Stowe and nearby Smugglers Notch State Park - 500,000 visitors during summer/fall
- In the winter another 350,000 visitors are seen
- Stowe Mountain Resort has been generally slow to consider non-winter – only exceptions had been golf / alpine slide



Case Study: Stowe Mountain Resort

- During the 2000's Stowe embarked on major real estate expansion – Spruce Peak
- Dynamics of the guest experience were changed – Spruce Peak had a summer/fall population – what were they to do?
- MSRP was driven to address guest needs first and secondly to respond to existing local community /regional tourism



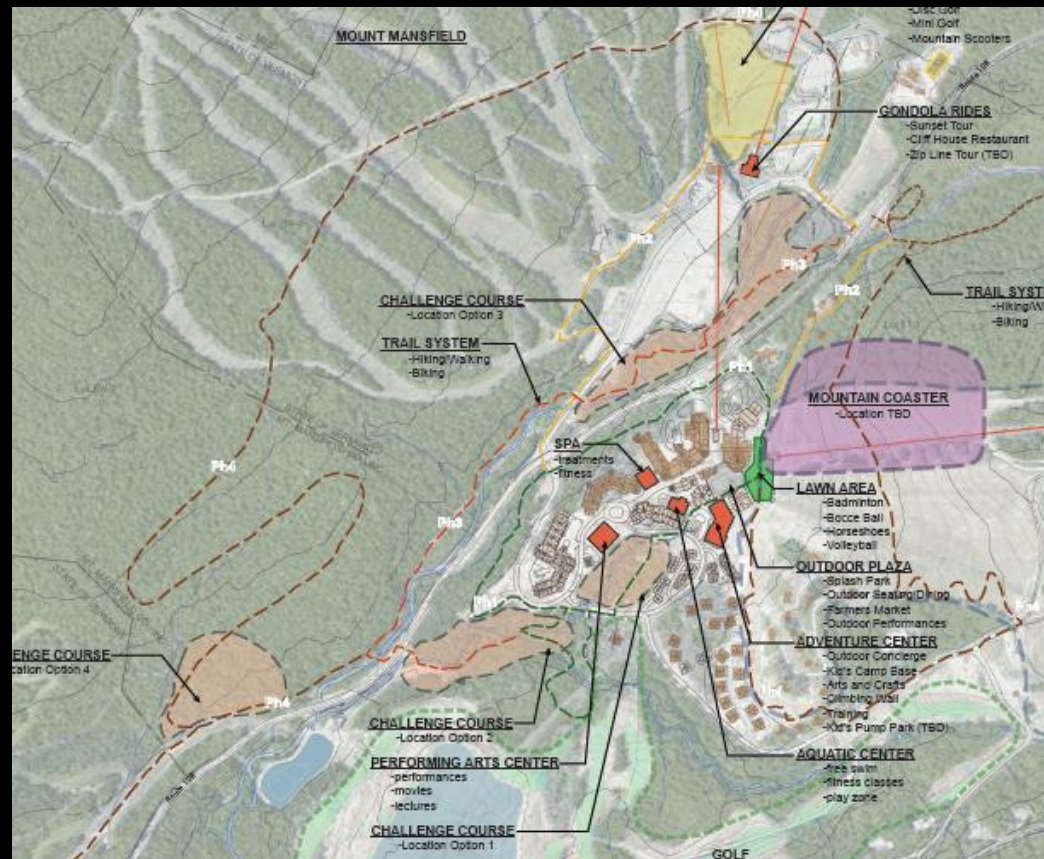
Case Study: Stowe Mountain Resort

- Community Recreation path extends about 6 miles up from the Village of Stowe but doesn't make it to the Mountain
- The Recreation Path is a huge regional economic engine. It connects to businesses along the mountain road and draws visitation in its own right
- Stowe Mountain Resort saw the opportunity to establish the linkage to support guest needs AND support local/tourism needs
- MSRP includes expansion of trails in support of this goal – key issues of funding to be worked out in a partnership



Case Study: Stowe Mountain Resort

- Components of the MSRP include:
 - Fun Zone
 - Challenge Course – but not a canopy tour
 - Aquatics
 - Performing Arts Center
 - Extensive multi-use trails – on mountain
 - Adventure center



Case Study: Stowe Mountain Resort

Lessons Learned:

1. Find a common element that connects the ski area with its broader community. This can be the basis of real cooperation
2. Avoid duplication of activities, programs and facilities with other competitors – Smugglers Notch has a great canopy tour nearby – they can partner on that
3. Focusing on the guest/tourist will demand some level of exclusivity – but don't build a wall around the ski area

Summary

- MSRP at ski resorts is in response to broader transitional forces within the ski industry
- Both public and private sector ski areas have responded to these forces
- The drivers of this change are recreational market, demographic, economic and operational realities
- Non-winter program development is ongoing and will likely continue
- Population – Resident population VERY SMALL compared to Tourist Population – it's a numbers game

Summary

- The process for MSRP is essentially the same for private sector clients (ski resorts) and communities - Key differences are in target market focus (resident, local or tourist), public engagement, expectation on return and alignment with other planning initiatives
- The opportunity exists for a cooperative planning effort between municipalities and resorts to forge alliance on recreational infrastructure that appeals to both local need and tourism – greater communication is key

