

ALTIMETRE

Summer
2017

Perspectives on French mountain
tourism development

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Moving beyond to
2017



Edito

Due to changes in the scholar calendar this year, the French summer holidays will start on July 9th till September 4th. Tourist offices, national parks, ski resorts, thermalism and mountain villages are in the starting blocks to offer traditional and new best mountain experiences.

A recent study from the French national statistic studies institute (INSEE) reports that nationwide, the summer season is as much important as winter season in terms of revenues for the mountain tourism in France.

But beyond that, a number of public organisations have been regularly brainstorming on how to develop a “4 seasons” mountain, and how to better connect valleys to ski resorts in order to boost the economic development of mountain territories.

Key insights from two events I attended this month will give you some hints on what's going on here in our French northern Alps. As usual, feel free to drop me an email should you be interested to get further insights.

With that, let me wish you a very positive and vibrant summer.

Yours sincerely,
Virginie Dosseto



MOUNTAIN TOURISM IN FRANCE

Summer weighs as much as winter

Interesting insights from a study realized by INSEE institute for ATOUT FRANCE were published by Les Echos, one of the major business and economic French newspaper, on June 12th

28% of French respondent used to spend holidays in French mountains, generating 11 billions € spending. While a number of mountain tourism professionals and local politics recurrently ask for a 4 seasons development, results from the study show that surprisingly enough, the summer season is as important as winter:

	Overnight stay <i>(out of a total of 205 millions)</i>	Spendings	Ski resort destination
Summer season June/September	51%	45%	29%
Winter season December/April	33%	40%	67%

According to seasons, French tourist's quest targets different destinations and practises: If during winter, visitors mainly stay concentrate around ski destinations (67%), from June to September, 71% is attracted by nature and multi-activities in a wider perimeter than ski resorts.

In summer, French mountain tourists are looking for an accessible nature environment, with little or no effort to be made. So, aside from traditional summer activities like hiking, touristic areas have now developed a number of new products to better fit tourists' expectations.

On one hand, animal-based activities for smooth and environmental-friendly transportation modes like thematic walk paths, donkey ballads, sled dogs ("cani-trottinettes") are getting attraction as they make youth, families and elder tourists easy to get up and to discover hidden mountain treasures.

On the other hand, some famous touristic destinations have been massively investing in infrastructures to attract visitors both in winter and summer.

Needless to say that a trend is taking shape : the creation of fun-filled amusement parks., with already an unavoidable escalation in projects size .

TIGNES - SKI-LINE (alt. 2.100 m)



A Dubai-like ski-dome in Tarentaise by 2020: 365d of skiing / 400m long & 50m large

Expected budget: 62M€ / Calls for private investments in progress

New ClubMed Village to be built, as well as a Wave pool equipment.

COURCHEVEL

AQUAMOTION (alt. 1.550 m)



Aqualudik park inaugurated in Dec.2015 / 15.000 m2 surface (10.500m2 indoor) / 4 spaces : Aquasportive, Aqualudo, Wellness, Spa & Balnéo / 63.5 M€ (100% funded by Courchevel Town Council) / open 9/12months for tourists and local population.

CHAMONIX MONT-BLANC

STEP INTO THE VOID (alt. 3.842 m)



Inauguration Dec.2013 / 2.50 m glass cage out over a 1000 m precipice / Real technical masterpiece, supplemented with the "Pipe" in 2016 (2.3 M€ 100% funded by Compagnie du Mont-Blanc) / A second "skywalk" at the Aiguille du Midi is under study.



VALLEY LIFTS

New economic development perspectives ?

Over the last decades, valley cities have often been left behind, and disconnected from massive efforts and investments made to improve ski resorts attractiveness

However valleys are also a necessary step to reach resorts and to transport a pool of seasonal workers.



So nowadays, in a context of fast development, where change is a constant, internationalization intensifies the law of competition, and environment equilibrium is under threat, politics have been exploring key challenges to a sustainable growth in our mountain regions,

In the scope of a national cycle of lectures about relevance of valley lifts, I personally attended the conference-workshop organized in Albertville (Tarentaise region - Savoie district) by the CLUB EURO ALPIN (Chamber of Commerce - Grenoble, Isère) together with LE CHAINON MANQUANT association on June 27th.

The question of valley lifts in the Tarentaise-Vanoise area forms part of a SCOT, the French name for a territory-wide master plan that defines a territorial project at municipalities or group of communes level in terms of living-space, mobility, commercial development, environment, tourism. This urban planning document aims at harmonizing and creating greater consistency between sector policies.

The Tarentaise-Vanoise SCOT boundaries include 35 communes, organized into 5 inter-municipality structures, with approx. 54.500 permanent inhabitants. For information, according to Domaines Skiabiles de France (www.domaines-skiabiles.fr), the Tarentaise territory offers the largest concentration of ski resorts worldwide, ¼ of the French skiing is located in Tarentaise.

Local elected representatives have been actually reflected on a 4 seasons mountain tourism” to further improve the connection between ski resorts and annual living areas in the valleys.

Therefore valley lifts have been considered as a good environmental-friendly mode of transportation, with the ambition to:

- Create an alternative solution to single-occupant cars (seasonners or local merchants commuting from valleys to resorts), to relieve road congestion and to reduce air pollution
- Create alternatives in valleys to parkings in ski resorts for daily skiers
- Facilitate the emergence of real estate/accomodation building projects and to revitalize cities in valleys.

In parallel to presentations about , 3 out of the 4 projects already identified in Tarentaise were presented to the audience (Val Thorens project was the one not presented at the workshop). Hereunder 2 projects:

BOZEL - COURCHEVEL	AIME-LA PLAGNE
	
580 m alt. - 1.475 m alt.	650 m alt. - 1.975 m alt.
Bozel : 2.019 residents Courchevel : : 2.426 (commune newly created on 2017/01/01) <small>(Source : INSEE 2014 et 2017)</small>	Aime-La Plagne: 4.538 residents (commune newly created on 2016/01/01) <small>(Source : INSEE 2014)</small>
<u>Starting asumption</u> 21.5 to 24.5 M€ investments, based on technical options Open 180 days/year From 7:30AM to 8:00PM	<u>Starting asumption</u> 22 M€ investments 150.000 allers-retours /year Building/accomodation projects in the valley and a 4 seasons leisure and recreational park in La Roche (for 8M€ investment)

All of these debates around “soft” transportation alternatives are part of a global strategy to strengthen the competitive advantage of the French mountain tourism, not only to ease access to ski resorts during winter, but also to give the means and resources to support a sustainable 4 seasons development

- Additional information available upon request -



CLUSTER MONTAGNE General Assembly 2016 results at the top



Reference organisation in the mountain industry development, the CLUSTER MONTAGNE hold its 2016 annual general assembly on June 27th in Chambéry (FR).

CLUSTER MONTAGNE mission is to federate, to support and to promote the French mountain industry both in France and abroad.

With 400+ companies nationwide, the mountain industry employs 5.000+ people and generates

1 billion euros revenues in 2016.

After six years of existence, CLUSTER MONTAGNE has won the confidence of more than 200 members and partners (private companies, public institutions, research centres, etc.) involved in the promotion and development of the French mountain ecosystem.

Moving forward, the CLUSTER MONTAGNE will particularly work on 7 priorities for a Sustainable, Accessible, Secure, Interactive, Playful, Competitive and Collaborative mountain

Aside highly positive results in 2016, CLUSTER MONTAGNE has unveiled its ambitions for 2017-2021 to steer the mountain industry to greater heights of achievement in the years to come :

REORGANIZATION of Cluster services and working groups into 6 new internal streams :

- Membership and partnership
- Communication, promotion and events
- Innovation and prospective
- Career/job and training
- Business development
- Entrepreneurship

A **new building**, kind of base camp, the **TOTEM**, is expected in Alpespace business park by 2018 to showcase the French unique mountain industry competencies, know-how and excellence.

Creation of **THINK TANK for INNOVATION**: "Tomorrow's mountain" ("La montagne de demain")

In close cooperation with members and working groups, 7 PRIORITIES have been selected to develop attractiveness and performance of the mountain industry and associated tourist areas:

- Sustainability
- Accessibility
- Security
- Interactivity
- Playfulness
- Performance
- Dialogue and concertation

**You'd like more information on Cluster Montagne initiatives?
Let us know !**



As a result of the tremendous efforts and initiatives, the CLUSTER MONTAGNE has been awarded this year of the Gold Cluster Management Excellence label from the European Secretariat for Cluster Analysis (ESCA)

It is worth noting that the CLUSTER MONTAGNE is the first French cluster to receive this European recognition for excellence. A great honor for the mountain industry !

ECHOES from newspapers

TRANSPORTATION / MOBILITY

[Cycle tourism : 40 millions euros invested by the French region Auvergne-Rhône Alpes](#)

Three more years to go before you can ride bike between the Swiss border and the Mediterranean sea, along the Rhône banks. 1.700 km are already operational, and 400km new greenway network should be ready by 2020.

The cycle tourism in France is doing well (2 billion euros expenditures) and is dynamically growing (+10%/year). The average cycle tourists daily spending is in average 75€ per day, superior to what tourists spend during their stays.

The economic potential of ViaRhôna only is expected to reach 35 million euros per year, equivalent to 43.000 €/km per year, for an infrastructure average cost of 100.000€/km.

Source : La Tribune - Acteurs de l'économie - 27/06/2017

THERMALISM

[Thermalism : €20 million for the modernization of 15 thermal health resorts](#)

The Auvergne-Rhône Alpes (AURA) region ranks 3rd for the thermalism tourism after Occitanie (1st) and Nouvelle-Aquitaine (2nd)

End June, the Region unveiled its plan for the thermal resorts modernisation: €20 million will be invested to support 15 selected stations, 3 of which are in the Northern alps: Aix-les-bains, Brides-les-bains (part of the 3 Valleys in the Tarentaise area), and St Gervais (part of Chamonix Mont-Blanc domain)

The Auvergne-Rhône Alpes region has the ambition to become the 1st thermal region in France, with 2.000 jobs created within the 5 years to come.

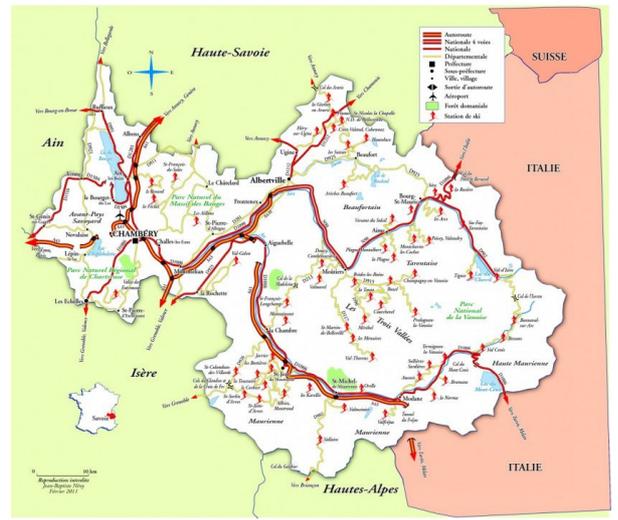
Source: France3 Region - 30/06/2017

Some topics, players or areas you'd like us to follow up for you? LET US KNOW

We put our info-communication expertise and technical platform, together with our professional network to deliver insights you are looking for to support your projects and your organization. Don't spend time sourcing for the right information. ASK US !

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Credits: Petit Futé

The region Auvergne-Rhône Alpes (AURA) alone counts for more than 70% of the French mountain economy. With 172 ski resorts concentrate on its territory, 9 regional and 2 national parks, 48 wildlife sanctuaries, 24 thermal resorts, AURA is the first French region for mountain tourism.

ALTIMETRE provides selected and qualified field information on mountain tourism development in the French northern alps, with a particular focus on Tarentaise and Haute-Tarentaise districts.

ALTIMETRE is an information product from *Open.Up Insights agency*, located in Courchevel, at the heart of the 3 Valleys ski area in France.

The quarterly ALTIMETRE bulletin is a unique selection of qualified information an objective analysis on mountain tourism development in the French northern alps, with a particular focus on discussions, initiatives and upcoming projects from tourist offices, ski resorts, national parks, and professional/governmental institutions and NGOs.

ALTIMETRE BENEFITS FOR YOUR ORGANIZATION

- => monitoring of hardly accessible data and information when you are abroad (databases, proceedings, studies available only in French)
- => access to valuable regional insights translated into English language for faster uptake
- => increased knowledge of the 1st French mountain tourism region to benchmark with your strategy and actions
- => bulletin customization to your needs in terms of topics or resorts to monitor

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