

Promotion of Luxury Ski Resorts Using the Internet

Maud Tixier

ESSEC Business School Paris/Singapore
Tixierm@essec.fr

Abstract

Luxury ski resorts deliberately communicate mainly via brochures and their internet site. The image they wish to convey of themselves, their positioning and their reality varies from one country to another, depending on the customers targeted, their geography and many other factors. This article focuses on France (Courchevel, Val d'Isère, Megève, Chamonix), Switzerland (St Moritz, Gstaad), Austria (Lech-Zürs) and Italy (Dolomites) for Europe, Whistler in Canada and Aspen and Vail in the USA for North America. These comparisons and the eagerness to differentiate described in this article have an impact on their competitive situation notably when the economy hits a rough patch.

Introduction

Communication in the field of luxury tourism boasts specificities and a dual goal: on the one hand, the image of a dream destination, on the other hand product/service renown that are selling points (the aim being to enhance the services on offer or the unique setting). Image-focused communication covers all the embodiments one wishes to bestow on a product/service or that are perceived by customers. It aims at immersing the potential customers in a realm of suggestions conveying the idealness of the location. Very much in use in the luxury industry in general, it titillates the imaginary and entices the potential customer. Product-focused communication strives to enhance real components of the product/service. Its function lies in meeting consumer needs and expectations. Hence an enhanced product/service renders customer choice easier by reassuring him or her about the awaited values. It furthermore enables to materialize the sale. The aim is to endow the product/service with a personality, an image, added value, to endow it with a «cultural environment».

Successful strategic communication imposes major choices to select the various initiatives it leads to. When global, it concerns all the communication means: the target here being wealthy customers, an impact of conquest and of customer loyalty, strong assets to enhance and on which to communicate and various schemes or means, all this in a certain style or manner of expression that contribute to establishing an atmosphere of elitism and exclusivity.

The means are numerous and we shall focus on the external means excluding below the line advertising, under control, used in world famous high-end ski resorts that endeavour to promote themselves supporting a positioning that is as clear as possible.

The aim of this article is to compare the proactive communication of these resorts, the positioning that is reflected and the impact on their competitive situation that their differentiation strategy might have.

Methodology

Generally speaking ski resorts communicate little or not at all, or at least not directly. They gain popularity mainly via press repercussions and buzz, which are today their first communication means. Indeed, in the field of winter sports, there are many opinion leaders and their circle of influence (family, work, friends...) is widespread and hungry for information. One seldom embarks on a ski holiday without having beforehand heard of the selected resort and this is all the truer among the upper classes that above all seek quality and safety.

Thus resorts hardly communicate, they bestow this substantial task onto their regulars as well as the press. However this communication is « undergone » and not controlled. We have therefore examined advertising, web sites and brochures. Initially, we resorted to databases: Xtreminformation and Yacast, two web sites listing ads since the 90s throughout the major media (TV, radio, press, cinema, poster campaigns). Unfortunately, no significant ad was found concerning ski resorts. Only minor local promotions and communication by collectives (mountain collective) cropped up.

Since the major media were obviously not the favoured means for resorts when organising their promotion, we opted to focus on two media: the Internet, since web sites, together with brochures that are very similar, are the first communication showcases of resorts.

Internet constitutes a major stake in the luxury industry (internet users stem in their majority from rich countries, are middle or upper class and are often citydwellers). Internet offers the advantage of being powerful, simple, friendly and interactive. It is an international communication tool as cheap as a local phone call; today, thanks to the possibility of offering sound, colour and 3D pictures, around-the-clock connection and permanent updates, the Internet boasts major assets. It enables great reactivity from firms towards their customers but also information services, email, chats, virtual catalogues and brochures. Thanks to the Internet, customers take the initiative of communication and the message/the relation can be customised according to the potential customer: it therefore enables a communication that is both general and targeted.

It is the most cutting-edge and the most futuristic media and its potential is far from having reached maturity. According to the webmarketing agency cvfm.com, tourism accommodation is the most sought after field with over 35% of requests. However, the Internet cannot be considered a sales tool for luxury goods that must maintain the selective distribution that distinguishes them. The world of luxury can only use the Internet for informative purposes and as a means of intermediation and marketing. The web site of a luxury resort is foremost a showcase¹. The development of the Internet raises the issue of image control, the very stake of luxury. By reinforcing the material image of the luxury product (the internet user has the opportunity of seeing it more often), one reduces the share of representation linked to the product/service, its image coefficient².

The web sites of resorts as showcases of the values conveyed will therefore be analyzed; a web site indeed only mirrors what the resort wishes to be. This analysis began in October 2008 and came to an end in January 2009.

The web sites of the following resorts were analyzed by geographic zone: North America (Aspen, Vail and Whistler), France (Megève, Courchevel, Chamonix and Val d'Isère), Switzerland (Gstaad and Saint Moritz), Austria (Lech-Zürs) and finally Italy (the Dolomites: Alta Badia, Cortina d'Ampezzo).

The twelve selected resorts were quoted by all the experts³ as being high-end resorts that compete against one another throughout the world. They serve one another as reference when trying to define their positioning. They feature at the top of international and local rankings of the « best spots » in the list of high-end resorts⁴.

Given the specificities of communication in luxury tourism, 30 criteria were defined to analyze those web sites aiming either to improve the image of a dream destination, or to increase the renown of the product/service that sell by enhancing the services or the unique setting of a given resort, or both simultaneously.

Those criteria are, in detail, all the elements based on which well-to-do customers may choose a winter resort thanks to the information or the communication they have a right to expect from the web site of the said resort. i.e.: 1. the price, 2. declared socio-professional category, 3. altitude in relation to health, 4. beauty of the landscape, 5. architecture, 6. tradition: village, history, 7. reputation, imaginary, 8. safety and privacy, low-key luxury, 9. sustainable development, 10. new trends: such as: sneaker-wearing affluent customers, alternative luxury, 11. access to the resort, 12. friendliness of the locals, foreign languages spoken, 13. welcome in the hotel, mood, atmosphere, child-friendliness, 14. ski: levels, quality of the ski area, 15. altitude for snow cover, 16. quality of the slopes, maintenance, equipment, 17. other snow sports, 18. hotels and accommodation « at the foot of slopes », 19. comfort of the accommodation on offer: bedding, size of the rooms, 20. regulars one will encounter: nationality, age, occupation, 21. customised services, modern equipment, spa..., 22. eating: art de vivre, gastronomy, tradition, dietary meals, à la carte, 23. nightlife: bars, clubs, casinos, 24. outside catering: in the resort and in the mountains, 25. activities: ski front ..., 26. cultural aspects: concerts, exhibitions... , 27. shopping: luxury... brands, 28. summer activities, 29. golf, 30. miscellaneous: such as corporate tourism...

These criteria are not specifically weighted in our study. We only need to check whether that are present or not on each of the sites. The most important weighting of a criterium will appear when it is quoted under multiple forms and will thus be the object of several entries.

Results

USA: Aspen – the eclectic

The Aspen ski area -as big as 36 Disneylands- spreads around four mountain peaks: Aspen Mountain, Aspen Highlands, Buttermilk and Snowmass. The small town of Aspen is so varied it is unique: in addition to its impressive ski area, the former small mining town offers a very pleasant environment thanks, notably, to the acute sense of community that prevails and that has seemingly not suffered in the least from the prevailing luxury.

The success and renown of the resort seem to hinge around the multiplicity of its positionings that may seem conflicting but that are in the end complementary and therefore highly efficient. Indeed, while targeting a particularly vast audience, the resort strives to protect its privacy by limiting its expansion. Likewise, though the resort is today at the forefront de la technology it has not lost in the process the soul of the mining town and historical city.

For extreme skiers and thrill seekers

The logo of the resort capitalises on its environment: its four peaks and its ski area. The tagline « *The power of four* » definitely ranks it in the sports category: the resort aims to attract proficient and/or extreme skiers.

There are two types of visuals highlighted on the website: most illustrate off piste, high performance, extreme skiing, snow-boarding,.. thus emphasizing the practice of ski off the beaten tracks. This positioning is supported by visuals displaying infrastructures, symbols of the modernity and of the « power » of the resort: high-speed chairlifts, gondola lifts capable of reaching 3 800 m... Finally, further visuals focus on the abundance of snow. Aspen thus legitimises its local nickname: « Ajax ».

Aspen seems therefore to foremost cater to ski, sports and nature aficionados and thrill seekers. Indeed the buzz developed on the net (notably via videos) by the resort seems to have a priority goal: communicating about the sporting events it organises. However, Aspen seeks to seduce all categories of holiday goers.

For young, modern and « trendy » people

The resort conveys its modernity via its infrastructures. To « follow the trends » Aspen focuses more on the setting and complementary activities to ski. For the 2008/2009 season, the resort offers its visitors a unique experience: with this in mind, a new village entirely dedicated to after ski and nightlife has just opened, The Base Village with new accommodation and four avenues dedicated to eating, entertainment and shopping.

The greatest luxury brands have already set up shop: Louis Vuitton, Ralph Lauren, Fendi, Gucci or Christian Dior; the ski school uniform was designed by Ralph Lauren himself. Aspen is THE trendy and sought-after location: it hosts the greatest sporting events and the resort seduces trendy young people via its website by posting videos, webcams, podcasts... It has even developed a mobile website devoted to the resort and to the events it hosts. Each year, Aspen organises notably Gay Ski Week. In a nutshell, Aspen takes pride in being young, modern and trendy.

For elitists in search of small heavens

Despite all the developments in the nightlife and the infrastructures, the small town of Aspen seems to have lost none of its charm. The minimal and white logo also banks on preciousness: sparkles on the words are as many testimonies to the « magic » of the place and of its value. Aspen sparkles like a jewel.

Yet all the charm of Aspen resides in its history. At the heart of the town, most of the buildings date back to its foundation. The first chairlift was built in 1941 and its current identity dates back to the 50s/60s with the arrival of intellectuals, artists and philosophers. Their soul lives on today: peaceful, welcoming and cultured, the town seems welcoming of

all categories of visitors. The prices practiced in the resort are justified by the fact that such a place simply cannot be replicated.

For families

Aspen has just erected a child centre: 25 000 m² equipped to the great delight of the young with mini climbing walls and rooms decorated in a nature theme... Cost of the operation: 17 million dollars. Besides, a portion of the ski area, composed mainly of blue runs, has also become the favourite convening ground of families.

USA: Vail – The glamorous

A true institution

The resort was founded in 1962, on the model of European alp resorts, and notably along the lines of Swiss car-free resorts. The ski area spreads over a 10 km radius around the historical centre of the resort.

Vail is neither the largest nor the most popular of American winter sports destinations. This former sheep meadow has become the cultural cradle of family and high society winter sports. The resort was founded by two ski pioneers who, in 1957, climbed an unknown mountain and Vail hence enjoys great credibility.

The target it has set for itself is to offer holiday goers unique experiences by seeking to generate a buzz around its name and by playing the glamour card. Its catchphrase « *Like nothing on earth* » refers indeed to the notion of dream, as much by its meaning as by the softness of its tone. The presentation videos, on line on the site, focus on the paradisiacal aspect of the resort rather than on its sporting aspect. Videos to a jazzy music backdrop with jolly Xmas and winter undertones, including pictures of happy dogs and laughing children... The tone is given from the homepage with peaceful and enchanting visuals.

The black and white atmosphere is reminiscent of those old picture albums one browses with pleasure and nostalgia. It also contributes to the elegance of the visuals and their purity.

The « World Saver »⁵

Vail was recommended by the Conde Nast Traveller, a renowned American travel magazine, for pioneering social responsibility in the tourist industry, winning the international award of the magazine in the protection of the environment category. Vail mainly resorts to renewable energies and has set up an assertive program for nature preservation, in partnership with the National Forest Foundation, an association linked to the US Forest Service. In 2007 Vail launched its program for the protection of the environment that was prolonged in 2008 with the announcement of energy savings reaching 10% per year.

The resort goes even further by spreading its ecological principles to the food served in the resort. In 2007, Vail announced it would supply « good food » on « a large scale » by serving natural, hormone-free meat and organic milk in the high altitude restaurants. With this in mind, the resort created the Good Food partnership with two American food industries (Coleman Natural Food and Whitewave Foods Company). The aim: turning meals into a healthy and natural moment, like the activities on offer in the resort.

Besides, the giant ski resort announced its intention to build the greatest environmental ski resort in the world. Its surface is 1 million square meters of environment-friendly chalets, hotels, restaurants and stores. The resort should see the light by 2012.

An innovation: Arabelle

One of its major projects, besides its green village, is the construction of Arabelle. The aim of this new project is to satisfy the initial wish of the founders of the resorts: to create a Bavarian-style resort. Arabelle, a 250-million dollar project will, according to its builders, be the most elegant ski hotel complex in all of the United States.

The design team travelled all over Europe (Germany, Austria, Hungary, the Czech Republic...) to be as true as possible to local architecture, with 19th century German and Austrian architecture as an inspiration.

Luxury and elegance are the leitmotifs of this new project. And height of refinement, the Centre V, the central restaurant of the complex will be run by a French chef.

Canada: Whistler – The purist

Whistler belongs to those resorts that benefit from a « natural » renown, the result of an ideal location and a historical practice of ski. Initially christened London Mountain, Whistler was renamed in 1966 as a tribute to the whistling of the marmots that delved there. Since then, the resort has become the haunt of ski and nature devotees.

Indeed, Whistler emphasizes foremost on its website sports and ski, full stop. The visuals show chairlifts, the gondola lifts and slopes. The scene is set: the resort targets mainly those who have come to ski.

The logo represents a W, forming at first a mountain range; one also sees a slope beginning with two valleys and then descending in a straight line.

The resort was elected the prime winter destination in North America by the Skiing Magazine and represents alone 10% of the tourism income of Canada, an income to which Australians strongly contribute. In total, on average 40 000 people visit the resort daily and over two million each season.

The resort abides by its principles: ski first and foremost (its ski area, 200 slopes strong, is the largest in North America)... and nature above all: a scenery that is one of the main appeals of the resort. Hence everything is firmly controlled: the number of buildings, their height, their design and colour.

In addition to outstanding scenery, composed of 17 peaks and 4 glaciers, the resort enjoys particularly clement weather conditions: record snow falls combined with rather mild temperatures. To such an extent that the resort opens in November to shut down only in... June!

All this has a price: 81 \$ for a day ski pass for the ski lifts (in 2008/09). But the resort does not shy from indulging in luxury: it boasts very high-end hotels, restaurants (100), chalets and stores (200). And the ultimate luxury the resort has indulged in: welcoming the 2010 Olympic Games. On the occasion, a gondola lift linking Whistler to its sister Blackcomb was built, the Peak 2 Peak. Cost of the operation: 100 million dollars. For this

price, the skiers will be able to reach the opposite peak, 4.4 km away, in 11 minutes in a gondola lift equipped with a glass floor. The gondola lifts leave every 49 seconds and can contain 24 skiers, an initiative which will secure the renown of the resort for several decades to come...

France: Chamonix – The appeal of the Mont-Blanc

A historical sporting legitimacy

Today the resort is considered to be one of the most beautiful sports destinations in the world, notably thanks to its location at the foot of the Mont-Blanc. Chamonix endeavours to preserve the authentic atmosphere of its origins: skis appeared in France at the heart of the resort in 1876. Its renown as a resort started during the winter of 1924 when it hosted for the first time the winter Olympic Games and later in 1960, with the opening of the Grand Montets, today still the true Mecca for ski fanatics.

Chamonix is in the race to welcome the future national training centre of downhill skiing, snow-board and free-style, linked to the Fédération Française de Ski.

An exceptional location

Chamonix highlights in its logo, as in its designation its privileged location across from the Mont Blanc. The website of the resort is also adorned in the colours of the French flag. Chamonix communicates clearly on its peaks and therefore on its ski area. The website is very simple, mainly in html with few visuals and animations. Surfing is also simplistic and brief. The websites – of the resort as well as of the tourist board – are not very attractive.

Chamonix claims to be the third most visited natural site in the world. One of the main assets of the resort, in the winter as in the summer, is naturally its direct access to the Aiguille du Midi: a journey in a gondola lifts which many consider to be unforgettable.

At its summit, 3789 m high, one enjoys a vista on the legendary Vallée Blanche, the famous glacier but also one of the longest unmarked slopes unmarked in Europe: 21 km to reach Chamonix. The scenery is astounding with blocs of ice the size of a house. One can also catch a glimpse of France, Italy and Switzerland. Over 2000 skiers enjoy downhill skiing each winter by descending the Mer de Glace, the largest glacier in France, a trail that attracts skiers but also mountaineers and extreme parachutists.

A typical and refined village

Chamonix is also a small typical 19th century village. Everything in Chamonix is reminiscent of its historical legacy: the Musée Alpin that retraces the history of the mountain equipment, the Richard Bozen sports centre that houses a library and the national ski and mountaineering school.

In Chamonix, after-ski is among the liveliest in France, notably thanks to its casino. Chamonix is also famous for its prestigious restaurants with to its credit several renowned chefs. Among the most refined restaurants Le Hameau Albert 1^{er} stands out, a venerable Relais et Châteaux, reigning on a cuisine delving into Savoie and Italy, as well as the Bistrot Mickey Bourdillat, recently awarded a Michelin star and Les Jardins du Mont-Blanc. Chamonix dreams of becoming the alpine capital of haute cuisine.

In 2008, the Office de Tourisme de Chamonix was awarded the Iso 14001 certification for its environmental management system. This implies reviewing the work

habits and the behaviours towards natural resources and will significantly weigh on buying and investment decisions.

Chamonix launched its website in 2008 dedicated to the initiatives taken by the resort in view of the protection of the environment. Numerous measures are listed: new coaches giving off 80% less exhaust fumes, hotels in conformity with environmental standards, how to preserve the quality of the air...

France: Courchevel – The mountainside St Tropez

A communication revolving around sports and luxury

Its website is top of the range with a video-animated homepage: a Xmas-mood film, merry music and abundant snow with the spotlight on skiing and the mountainside, with luxury coming second.

The visuals devoted to skiing focus on extreme sensations and the quality of the infrastructures; indeed one of the greatest assets of Courchevel is undeniably its ski area.

The resort belongs to the Trois Vallées (together with Méribel, Val-Thorens and Les Ménuires), the largest fully linked ski area in the world, a north-oriented ski area, which provides it with more abundant and longer-lasting snow.

Yet Courchevel is also the highlight of the Trois Vallées, the most glamorous resort in France, nicknamed the « mountainside Saint-Tropez ». The atmosphere is eminently jet-set with world-class restaurants, nightclubs and trendy bars. And this aspect of the resort is also showcased with visuals evoking luxury and sensual pleasure.

However the video does not extend beyond the homepage of the website. By clicking on one of the two entries (Winter/Summer), one delves into the inside pages, far plainer and uncluttered. One then reaches a « booking centre » type site.

Nonetheless, the introductory video remains etched in one's mind: one then realizes one is not booking a stay in an everyday or general public ski resort, which enables the resort to distinguish itself but may also cut it off from a category of holiday goers who would not feel concerned.

One comes across this omnipresence of luxury at the heart of the resort. The major fashion houses such as Christian Dior or Louis Vuitton rub shoulders with fur outlets, luxury jewellers, art galleries and other luxury stores.

The limits of the positioning

Courchevel 1850 is the favourite resort of Russian billionaires. The resort is now wooing Middle Eastern countries: Dubai, the Lebanon, Saudi Arabia, Syria, Kuwait, rapidly growing economies and bearers of potential well-to-do tourists.

France: Megève - The society resort

Aristocratic origins

Everything truly began in 1916 when the baroness Noémie de Rothschild decided to found a ski resort to which all the personalities in the world flocked. The baroness set up an efficient building policy and as early as 1921 the first palace of the resort, the Hôtel du Mont-d'Arbois, opened its doors. The winter of 1924 was to once and for all seal the destiny of

Megève. That year, the Mont-d'Arbois welcomed King Albert the 1st of Belgium and Queen Elizabeth of England.

The tourist success of the small Haute-Savoie village was secured, its renown international. Other major figures contributed to the expansion of Megève. For instance Marc Maisony, who in 1951 set up the Sporting Club de Megève in Rochebrune. This groundbreaking complex hosted during thirty years the curling championships, ice-skating exhibitions and style galas. The arrival of Georges Boisson also marked a turn in the life of the village. With him, the hip bars such as the Cintra and the 4-star hotels would take off. One rubbed shoulders with Fernandel, Line Renaud or François Mitterrand. It was the golden age of Megève.

At the end of the seventies, after numerous developments (18-hole golf course, altitude airport, Palais des Sports...), tourist infrastructures in turn turned over a new leaf thanks notably to the Sibuet family that would endow the modern Megève hotel business with a pedigree. The program features superb hotels inspired by the traditional dwellings of Savoyard farms, offering a warm and genuine atmosphere together with luxury service.

An exclusive resort

Megève has also preserved its vast heritage of agricultural farms. They enable a traditional architectural homogeneity appreciated by foreign customers (English, Swiss, Belgian...), who represent over 70% of visitors to the resort. The stylish neighbourhoods have been the same since the fifties and include: Mont-d'Arbois, Demi-Quartier, Rochebrune, Jaillet and Princesse. This makes Megève the resort to visit to immerse oneself in French society life. Even the Megève logo recalls royal coats of arms and it appears hence to be a principality, a high-ranking place.

The cult of well-being

Megève is not a sports-oriented resort and does not mind: it gladly takes the opposite course to those ski factories that have disfigured the mountainside. Megève is foremost about pine trees, the Mont-Blanc, sleighs... about « typical mountainside ». One goes on family ski outings, slowly and quietly. Certain high altitude restaurants have become « musts ».

The activities highlighted are also exclusive and trendy, such as snow golf, ice hockey or ballroom dancing. But they are also atypical and therefore out of the ordinary such as cow polo or sleigh huskies: activities that contribute to the authentic and picturesque personality of the resort. Megève emphasizes the magic of the place. Hermès and Prada have opened stores. The show biz or CAC 40 stars have their habits there. In addition, Megève launched its website dedicated to the environment.

In April 2008, Megève organised the second “Open de Danse Sportive” to prolong the winter season with an event that is not tributary of the weather, at the Palais des Sports. This structure is placed at the disposal of competitions, as is the service of slopes for polo or golf, or the various services of the town hall for concerts.

France: Val d'Isère – Genuine ski

An international sporting renown

Val d'Isère does not stray from its path and, as a genuine ski and snow enthusiast, is very keen on competition. « *Our customers share this ski culture and transmit it to their*

children»⁶, according to Gérard Mattis, president of the tourist board. Skiers represent 80% of the holiday goers and foreigners 60%.

In February of 2009, the resort hosted the world downhill skiing championships. The wave of Olympic and international gold medals won by its gifted children has to a large extent contributed to the development and the renown of Val d'Isère: their victories turned the small village into a major international resort.

Val d'Isère is said to be the favourite destination for Europeans thrill seekers. An appeal that can be explained by numerous factors: the resort, nestled in a valley close to the Italian border, is located 1850 m high and reaches up to 3 300 m. Val d'Isère boasts an impressive ski area it shares with Tignes: the Espace Killy, spreading over 3000 acres.

Val d'Isère is also and foremost embodied in its old town with its church dating back to the 17th century; in 1992, the small resort hit the headlines as exclusive organiser of the men's events during the Albertville Olympic Games. Despite this, Val d'Isère endeavours to preserve its authenticity by imposing the Savoyard style to new buildings, and as result the resort retains today all the charm of a small alpine village.

Prestige and accessibility

Catchphrase and logo aim to seduce the greatest number of visitors possible while maintaining a certain prestige. Its website is both very typical, with picturesque visuals, yet also very modern thanks to its numerous animations and sound effects (the sound of a snowball when one surfs from one rubric to the next). Furthermore, as one can note on the visual of the homepage, the resort targets the young as well as families or couples.

The tag line and the combined logo convey two paradoxical ideas: prestige and accessibility. The symbol of the phoenix conveys a message of power and of supremacy. Here, one observes the snowdrop legs that signify: Val d'Isère, the royal winter sports destination. The catchphrase « *Val d'Isère, not just a dream* » is also ambiguous since on the one hand one mentions an « entry price » and dream and therefore elitism while on the other hand it expresses great openness since all those who wish to come are welcome. Val d'Isère has thus managed to create and subtly combine a logo and a catchphrase to convey openness and exclusivity.

Switzerland: Gstaad – The peaceful resort

Gstaad is foremost synonymous with discrete luxury, of the sort that one does not put on show but rather that one feels. It does not either strive to appeal to elite sportsmen... located at 1050 m, it would be a little pretentious.

A little luxury... and a lot of rest

Gstaad aspires at being a haven of peace, holidays, and relaxation for well-to-do holidaymakers. Here, to join in, one must avoid standing out and remain discrete: wearing a t-shirt while carrying a plastic carrier bag and newspapers, those are the adornments of the richest people in the world. They select this resort to experience a « sweet remoteness ». Even the restaurants remain low-key: no elaborate, fancy or innovative dishes, but a simple and refined cuisine, served slowly.

This 7000-inhabitant town plunges its guests into the past with its castle, its chalets with their smoking chimney pots and roofs underlined with small lights. With its picture-

perfect scenery, its children's activities and sleigh excursions, the Swiss resort knows how to seduce, smoothly.

Its catchphrase «*Come up, slow-down*» is not sports-oriented. The resort prefers to mention activities: snow-related activities (ski, treks and sledge), so-called epicurean activities (wellness, foodie activities and events organised by the resort) and finally family activities including an igloo village. Naturally, there are spick-and-span streets and luxury stores, but the rural tradition lives on and nature is overwhelming. Cows are everywhere.

The cohabitation of luxury and nature finds an echo within the logo of the resort itself, composed of a flower (mountain-endemic) and of the Swiss coat of arms that endows Gstaad with a noble pedigree.

Switzerland: Saint Moritz – The resort of the very wealthy

It is one the most cosmopolitan ski resorts in the world. It boasts the former residency of Tsar Nicolas II that has become the Carlton Hotel. Saint-Moritz has become the ultimate gathering spot of the Jet-Set at 1800m. From the outset, it banked on luxury.

Luxury, luxury...

The font suggests a touch of elegance and refinement like a calligraphed signature. The tag line « Top of the world » is explicit to say the very least: there is no better resort in the world.

The visuals highlighted on the website mainly focus on the lifestyle. Spas, restaurants, swimming pools, scenery... animate each rubric. Sports, tourism, infrastructures remain discrete and confined to the « activities » rubric.

One comes to ski but above all to bask in the sun and take advantage of the food and the unrivalled hotel complexes. The resort promotes unusual and exceptional activities: ice polo, bobsleigh...

... and art

In the small Alp city an amazing concentration of works of art abounds. Hanspeter Danuser is preparing for June 2009 an «art train» that will carry one hundred influential figures from the Venice Biennale to Art Basel, with a two-day stop in Saint Moritz. Just enough time, in such an exclusive world, to organise encounters between artists, collectors and art dealers. The resort is still lacking a genuine museum: there is a new construction project, at the foot of the palaces.

Austria: Lech-Zürs – The aristocratic resort

In Lech, the skiers are crowned heads; the Queen of Holland notably is a regular of the resort and rubs shoulders there with her peers, the princess of Monaco, the Queens of Sweden or of Jordan. What are the key values of the resort? Hospitality, warmth and cocooning. The resort embodies the ideal mountain village: a small round-dome church, a torrent, typically Austrian chalets covered in snow. The number of ski passes is restricted to 14 000 per day for nearly empty slopes!

The Lech ski school was founded in 1925 and advocated the Alberg method which today influences all modern methods. Lech is still managed by the ancestral families of the area: the locals joined up to preserve as best they could the legacy of the resort, dating back to the 14th century. In Lech, there are no major hotel chains. For luxury hotels one must travel to Zürs.

The web site of this resort is simpler: uncluttered design, descriptive visuals,... nothing betrays the luxury that prevails in the resort. The logo also reveals little information regarding its positioning, evoking only the snow and ski. The catch phrase « *Mehr raum, Mehr Zeit* » also endows the resort with an additional dimension but as it is not supported by visuals or style effects, it does not suggest much and does not much titillate the imaginary. Lech-Zürs enjoy a « natural » renown based on word-of-mouth. Both resorts welcome rich VIPs that have come not to be seen but to roam unnoticed and preserve their intimacy.

The new generation is mobile, multilingual, and modern and will wish to convey those values within the resort. Lech is therefore veering towards more sophistication to become more international. To demonstrate its newly-found sophistication and modernisation, the resort organised a food festival by inviting Michelin star chefs, sommeliers, artists and sponsors. It also opened a snowboard slope.

Italy: Alta Badia and Cortina d'Ampezzo - The spectacular Dolomites

The Dolomites are primarily renowned for their spectacular scenery. This specificity results from the relative youth of the mountain chain. The view from the slopes resembles a baroque painting which makes its mountain scenery unique in Europe: picture-perfect scenery with pastures, farms, chalets, edelweiss and bulbous steeples. In the Dolomites, the focus is placed on nature rather than on the resorts.

Traditional Cortina d'Ampezzo and its society life is the diamond in the Dolomites crown. It is the most upmarket of the resorts in which 40% of visitors do not ski, preferring to stroll. The spotlight is placed on the steeples and the peaks of the resort, as well as on its past (organisation of the 1956 Olympic games) and the historical legacy (village steeple). The resort logo – its name surmounted by a squirrel - evokes the mountainside in general and not skiing in particular, which deseasonalizes the region. There is also the «valley of wonders », Alta Badia, 200 km away from Venice and Verona, a resort that has welcomed amongst others George Clooney, Tom Cruise or Günter Sachs. Both resorts belong to the highly select circle of those that combine natural elegance and high sporting demand.

Up until the end of the First World War, the region belonged to Austria. An area therefore on which history has left its mark: the slopes one skies down are also those on which soldiers fought. The area is thus officially Italian but the Austrian culture prevails both in terms of languages spoken and of the food on offer.

The Stella tour is a unique challenge in Europe that enables skiers – whether beginners or experienced – to follow a marked trail along the high mountain tops of the Dolomites, while descending slopes and taking in sceneries both numerous and varied, all different from one another, a 40-km long challenge that takes approximately two hours.

The Dolomites boast some of the most modern and impressive equipment in the world. The slopes are near immaculate, maintained on a daily basis: in the area, looking after the snow is a matter of pride; teams are hired to daily remove one by one the stones that may crop up on the slopes.

Nonetheless the Dolomites are still not much patronized, notably since they are hard to access: three hours are necessary to transfer from the Verona airport, the closest to the first resorts.

Discussion

The two American resorts of Aspen and Vail, although very close to one another geographically and culturally, have chosen opposite positionings that enable them to target their own audience. The websites convey different images: the Aspen website highlights the modern and sporting aspect of the resort while that of Vail displays family and enchanting

images: dream and sports that is what affluent tourists seemingly expect, with both ingredients balanced differently according to taste.

Internationally speaking, it seems the Aspen strategy is more differentiating and therefore more relevant. Indeed, by highlighting its performances while evoking its historical roots, it brings a new more sports-oriented dimension which European resorts cannot as easily boast. As on any market, differentiation and added value are fundamental criteria to attract and build customer loyalty and, naturally, to enjoy an attractive price positioning. Limiting the offer is also a clever means to controlling demand and prices.

Vail has adopted the opposite strategy by developing infrastructures and investments, which enable the resort to develop but also to communicate since, if wealthy tourists enjoy authenticity, they also appreciate comfort.

To communicate, both resorts have opted for the same means: the buzz. Aspen is banking on on-line video by filming all the major sports events of the resort. Its multimedia rubric boasts numerous videos, relayed very efficiently on YouTube. The resort targets the gilded youth. With the Epic Season Pass, Vail also attracts the young, nonetheless the communication of the resorts targeting the young remains discrete since the resort is foremost positioned as a glamorous, discrete and family-oriented resort.

Whistler in Canada seems for its part to operate as a free agent, enjoying an especially favourable natural aura. This aura can also be observed in certain French resorts, such as Chamonix, for which sports and nature are their best spokespeople.

France and Switzerland compete in terms of their hotel industry and their architecture; yet the competition seems stronger between Swiss resorts themselves that share a more or less similar positioning, than between Swiss and French resorts that all things considered, complete each other more than they clash.

France enjoys an undeniable advantage compared to Switzerland: its status of historical skier and its privileged positioning, notably thanks to the Mont-Blanc. Switzerland has for its part opted for a unique positioning: luxury and rest, a strategy that grants it genuine credibility on the segment.

Nonetheless can this lead one to believe that international wealthy tourists keen to relax will more spontaneously turn to Switzerland? Nothing is less definite... Certain French resorts – and notably Megève – remain landmarks in the field. But they perhaps run the risk of being less credible given the dynamic and very touristy profile of the French mountainside. France remains unarguably the birthplace of ski and gastronomy, while Switzerland has no equivalent in terms of luxury and quiet. Swiss resorts also boast a very strong positioning that can by no means be mistaken for that of North American resorts which position themselves as extreme and high performance ski resorts. In this field France is one step ahead: two of its resorts, Val d'Isère and Chamonix enjoy a practically natural renown, linked to their historical sportsmanship, an advantage the Canadian resort Whistler also enjoys.

Judging by the website, the positioning adopted by Val d'Isère is far more involved than Chamonix and far less exclusive than Megève.

Val d'Isère has managed to build customer loyalty among an especially versatile audience: sportsmen and adventurers.

On the Courchevel website, the visuals dedicated to ski have a lot in common with those used by North American resorts, placing the emphasis on extreme sensations and the quality of infrastructures; it is normal for the resort to place the spotlight on its ski area. In France indeed is there any room for another Megève, a showcase and relaxation resort, bearing in mind that France is foremost famed for -in addition to its hotel industry- its sporting past and its ski areas? Since the rich after rest and fresh air turn more to Switzerland, far wilder.

Megève possesses an aristocratic past Courchevel is devoid of. Impossible therefore to compete with it on the same niche. That perhaps explains why the resort attracts more stars than crowned heads, the nouveaux riches rather than princely families. Megève is the sole French resort positioned on this niche. Chamonix and Val d'Isère have chosen another gap that works on its own: sports. A positioning Courchevel might be wise to duplicate.

The Tyrol resorts make little effort to promote themselves and their appeal is seemingly for the time being mainly related to their natural environment. The Dolomites in their popularity closely resemble Chamonix: an uncluttered site, no or little communication; nonetheless, they do not enjoy the historical and sports legitimacy of the French resort, which could considerably hinder their growth.

Furthermore Lech-Zürs is an interesting resort since fully expanding and double-sided. Indeed the resort has taken advantage of its expanse to cater to the needs of two types of customers: rich tourists in search of luxury and the spotlight and rich tourists, more withdrawn, in search above all of discrete comfort. In this sense, the resort has managed to combine two types of opposite positionings: an aristocratic Megève-style positioning and a more extravagant positioning, similar to that adopted by Saint Moritz. This is an example Courchevel may follow, composed of four distinct neighbourhoods, to broaden and diversify its target.

Limitations and future research

Limits would concern uncontrolled forms of communication or reactions to all forms of communication to supplement the study. It would have been interesting to study forums and blogs, the main conveyers of the public opinion on the net. However, the posts risked not reflecting the core target, rich tourists.

Besides, one observes that some resorts are going upscale and could therefore have been studied. As is notably the case of American resorts such as Jackson Hole and Sun Valley or of the Austrian resort of Bad Gastein which according to the international press are said to be the latest luxury ski resorts in fashion. The breakthrough of new competitors in China, India and Eastern Europe is a recent phenomenon, whether those countries are developing their own resorts or whether their nationals are becoming new customers in famed resorts. The survey could hence be enriched with new competition, perhaps less expected since less renowned yet as dangerous.

Finally, it would also be very interesting to organise a panel survey to understand the decision-making process of wealthy holiday goers, how and why they choose such and such a resort. What they are looking for and their hobbies should also be the subject of an in-depth survey. It is thus that we shall be capable of determining the levers to activate to communicate efficiently. A comparison between the image websites aspire to and wish to control and the image experienced must be undertaken, of general-public and specialist press on those same resorts⁷.

Conclusion

Internet is a cheap means for resorts to communicate on their image and to convey their adopted positioning. Hence, all the resorts studied have their own websites, more or less carefully produced and advanced technologically. American resorts stand at the forefront of technology with comprehensive websites, flash animations offering numerous videos and applications (weather, webcam...). Just like their infrastructures, their portal is at the forefront of technology. For French and more generally speaking European resorts, the situation is somewhat different. Indeed, even though most of the resort websites hold their

own in front of their American counterparts, some remain very basic, worthy of the first generation of internet, with texts and fixed pictures; it is notably the case of Chamonix and Cortina d'Ampezzo.

When resorts enjoy natural legitimacy and/or credibility, it seems there is no need to invest in communication; such is the case of the two resorts mentioned above: both indeed enjoy an exceptional natural situation around the Mont-Blanc and the Dolomites, which generates a natural buzz; therefore for those resorts, sports and nature remain their best spokespeople.

For other resorts, on the other hand, the website is the favourite means to attract visitors. That is why the homepages are generally very nicely produced and emphasize the highlights of the resorts. Such is notably the case of Megève which showcases its wood chalets and the picturesque sports on offer. For Whistler, the visuals are of a different nature altogether, focused on helmet-wearing skiers and brand new gondola lifts.

To each resort corresponds therefore an internet environment. Generally-speaking, websites do not look much alike : resorts avoid head-on competition, at least on a national level; indeed on an international level, resorts take the liberty of a little more resemblance : the Lech-Zürs website for instance as regards certain features, and notably its catchphrase, looks like that of Gstaad.

Finally, one notes that resorts with multi-faceted positionings, such as Megève (sensual pleasure and sports) or Aspen (modernity and history), most of the time develop simply one angle of their character, probably the one deemed the most important and attractive for their core target. Thus Aspen banks more on its modernity and sportsmanship than on its history, and Megève more on its aristocratic legacy than on its ski area.

There are resorts in which one skies (Whistler, Aspen, Chamonix, Val d'Isère...) and there are other types of resorts. Generally-speaking, North American resorts highlight their snow cover, their infrastructures, their nearly unspoilt slopes. Nevertheless they differ from one another through specific features: whereas Aspen is positioned as young, accessible and sports-oriented, Vail highlights foremost comfort and well-being; Whistler finally is positioned as an extreme sports destination, a ski purist. To each resort its profile.

This communication strategy can also be observed in Europe and notably in France where one could practically twin French resorts with their American counterparts. Indeed, the positioning of Val d'Isère is very close to that of Aspen, Megève is very similar strategically to Vail and Chamonix, like Whistler, has opted for a natural positioning, based on a legitimacy in ski and snow sports. As was noted, on a national level the positionings differ from one another and do not much encroach each other; internationally on the other hand the same strategies can be observed and competition then turns frontal.

In Switzerland however, resorts have a very specific positioning unlike any other: indeed Saint-Moritz as well as Gstaad mention little or no skiing, but exclusively rest and relaxation. Switzerland, internationally renowned for its peaceful side and the excellent quality of its hotel business naturally banks on both those attributes. Austria (Lechs-Zürs), aware of the relevance of this as yet under-developed positioning, seems to be following the same path. Likewise for Italian resorts: Cortina d'Ampezzo where 40% of visitors do not ski has also opted for a communication focused on luxury and pleasure, rather than on ski and sports.

Thus, in Europe as in the United States, resorts have decided not to compete directly with each other. They nonetheless share common interests and targets which they must combine. Furthermore, in order to avoid frontal competition that may turn out to be harmful, European resorts have elected to unite under a common label: the Best of the Alps. A debatable strategy, since perhaps cannibalising: by joining forces, resorts run the risk of

losing their specificities. However, for American resorts, joining similar labels could only be profitable if it enables them to be thus related to the European quality and prestige.

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² Frédéric Hemery, Esprit de luxe agency, *Luxe et marketing direct : attention au mirage technologique*, www.abc-luxury.com

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⁵ « Vail Resorts Named a 'World Saver' », PR Newswire, August 18 2008

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