



August 14, 2013

To: Ron Trabes, North Lake Tahoe Resort Association

From: Carl Ribauda, Strategic Marketing Group

RE: **North Lake Tahoe Competitive Dynamics**

Ron,

Below are responses to the original questions we discussed on the competitiveness of North Lake Tahoe.

Is the North Lake Tahoe “product” competitive with the competitive set? If yes why, if no why not?

Winter – North Lake Tahoe’s concentration of ski resorts makes it very competitive with the winter destinations outlined in the comp set. The investments made by both Vail Resorts and KSL in the ski resort product ensure that the ski resorts provide the amenities and experience that destination skiers seek. The villages at Northstar and Squaw Valley provide high quality lodging, along with shopping, dining and activities. That said, North Lake Tahoe does not offer the level of comprehensive public transportation found in other competitive mountain destinations including Park City, Summit County, Vail and Aspen that allows skiers to easily travel between the ski resorts.

Lodging – North Lake Tahoe’s lodging options are a mix of a few larger high end properties along with a number of smaller motels and a high concentration of vacation homes. The North Lake Tahoe area has limited mid-range or branded hotels which provide global distribution outside of traditional channels provided by the NLTRA. This puts the destination at a disadvantage against most of the identified winter and summer destinations within competitive set, with the exception of Mammoth Lakes.

Summer – North Lake Tahoe’s summer product is focused on outdoor recreation, as the lake and surrounding mountains and ski resorts offer visitors a wide array of outdoor activities, both in and out of the water. As such it is very competitive with a number of the identified destinations on the outdoor recreation piece. The destination has also developed numerous summer events, including regularly scheduled events at Commons Beach, Squaw Valley, Northstar and Kings Beach. Currently the North Lake Tahoe area provides a host of strategic events including Autumn Food & Wine Festival and the new

Ironman competition, Wanderlust, Tough Mudder, Summerfest, Shakespeare and more. These major events are complemented by a variety of free smaller community based events that can attract visitors currently visiting the area. It should be noted that several category events can also be found in other destinations, some with more compelling offerings for that specific segment. For example, within the food & wine positioning, competitors like Napa, Sonoma and Monterey have stronger attributes and infrastructure to support this segment. Other events like Wanderlust and Tough Mudder, while very successful, are now offered in other destinations. Additionally, North Lake Tahoe does not have the advantage of a variety of attractions (in a traditional sense) that are found in destinations like San Diego and Monterey (ex. SeaWorld, Monterey Bay Aquarium). It is home to a number of state parks, public lands and historical sites, and could potentially capitalize on those more.

Access – While North Lake Tahoe is close to two regional airports (Reno and Sacramento), its access is limited when compared to those destinations within proximity to a major international airport.

Looking ahead what customer segments does North Lake Tahoe want to attract and from a visitor experience perspective, does the destination have what they want?

Clearly North Lake Tahoe has the ability to capitalize on the recreational assets that are within the region. **However it is important not to consider recreation as one monolithic market segment**, but as one that is nuanced with different segments of recreation participation. It is important to consider the needs of sub-segments, including a range of visitors looking for everything from hard core experiences to those looking for a more moderate and casual experiences. Those looking for hard core tend to be more singularly focused on a single activity while those that are looking for more moderate and casual experiences tend to focus on a broader range of available activities. This segmentation works both for summer and winter.



It should be noted that the more single focused the visitor (in this case hard core) often times the less important the ancillary activities are in the decision to visit. Moderate and casual participants use these activities as hubs (key activity) but do place a higher importance on other activities that provide a rounded destination experience.

To take advantage of this segment it is important to have a much greater understanding of each of these profiles so specific messaging and programming can be targeted appropriately.

A second and increasingly important segment for North Lake Tahoe to consider is **the destination visitor beyond the core Northern California market**. The proximity of the Northern California market has

provided North Lake Tahoe with a consistent level of demand for decades. However that market tends to be weekend oriented and price sensitive given its familiarity with the market

In contrast the destination market tends to stay longer, has a greater economic impact, and arrives by air. It should be pointed out that while North Lake Tahoe has a supply of higher end lodging properties, initial observations indicate there is a lack of mid-priced branded properties that are attractive to this segment. The level of natural beauty and recreational assets are compelling on a national level, but the range of hotels and different price points and value levels is limited. **As such, North Lake Tahoe needs to effectively communicate private lodging offerings and values through its marketing and communication channels.** Additionally the ability for the NLTRA to provide sustainable funding over a long time horizon is another key component to success.

A final consideration is **the need to upgrade the core Tahoe City and Kings Beach experience.** With the addition of new infrastructure in Squaw Valley, Northstar and Truckee the competitive trend is clear. Tahoe City and Kings Beach are losing revenues as those areas continue gain revenue. Currently the Kings Beach area is in the process of transition, and NLTRA is taking the lead in developing a vision for the future of the Tahoe City area which will be needed for the region to remain competitive over the long term.

What is the direction that North Lake Tahoe needs to go in to increase its competitiveness and attract its desired target segment(s)?

While this question is compelling and could be the focus of a strategic plan unto itself, we have developed the following for consideration and discussion:

Recreation orientation – As was mentioned above the North Lake Tahoe region offers a wide variety of recreation opportunities. A key to future success will be to leverage these assets by further understanding the sub-segments and their needs.

Attract destination visitors – Also mentioned above is the need to attract more destination visitors since on an incremental basis these visitors provide the largest economic impact.

Wider lodging choices – A wider range of branded lodging choices along with their global distribution channels can provide a greater value proposition to both regional and destination visitors.

Infrastructure improvement – The following infrastructure projects need to be considered:

A. Kings Beach and Tahoe City Revitalization – As was mentioned above both Kings Beach and Tahoe City are involved in revitalization programs to enhance the North Lake Tahoe experience for locals and visitors alike. This evolution is very much needed to improve the competitiveness of the region.

B. Special Events Facilities – In addition to the downtown area the potential for a special events facility would provide the North Shore with greater flexibility in implementing special events designed to attract target segments, as well as provide the local community with opportunities for local community events.

What are summary trends that can be observed within the comp set destinations?

1. Increased focus on events

Since the recession in 2008 destinations have increasingly focused efforts on special events in order to increase visitation to the destination. In many cases events provide a motivation for visiting a destination. As such more and more efforts have gone into creating event of attracting events. Events are now being commoditized with limited differentiation. Simply consider the number of wine related events throughout California on a weekly basis. **The challenge is how to stand out in the more cluttered event marketplace.**

2. Increased focus on destination differentiation

More and more destinations recognize the need to differentiate themselves in a very crowded tourism market. It is clear that destinations do not seek to be the low cost provider, and as such they constantly look for ways to create a difference between themselves and their competitive destinations. **The challenge is to not become everything to everybody.** We have all seen examples of restaurants competing in the marketplace. When one offers a new style of food the other will offer some similar dishes, then a new restaurant comes into the competitive set with a different offering, and the original restaurant also introduces those similar menu items. At some point the original restaurant loses a clear sense of its identity and brand. So too with destinations, the most successful destinations will maintain a clear focus of who they are and who their target segments are so they can offer carefully calibrated messaging and programming.

3. Increased focus on niche segments

As interactive marketing and social media tools have improved many destinations are now able to develop very targeted focused approaches to reaching those niches. With the advent of geo and lifestyle targeting many destinations are spending more heavily on interactive advertising approaches.

4. Mountain destinations continued focus on summer demand

The mountain destinations in the comp set all continually look to increase demand in non-winter months. In an effort to increase revenue create more sustainable revenue and increase local tax collections mountain destination areas have added a full roster of summer activities and events.

5. Summer comp set destinations all have TBID funding

Within the summer comp set all of the destinations are funded by tourism business improvement districts. In many cases this funding augments public sector funding that is also available. Each of the destinations has significantly increased available funding for tourism promotion within the last five years.

Summer Destinations

Napa

Napa County is a region with a rich wine history. It has become synonymous with California wine making, so much so that Napa Valley is recognized as an American Viticultural Area (AVA). Napa is also one of the original counties in California, established in 1850. Located north of San Francisco, Napa County is adjacent to Sonoma, Solano, Lake and Yolo counties. It is served by San Francisco International Airport, Oakland International Airport and Sacramento International Airport, each approximately 60 miles away.

Napa's lodging options tend to be higher end hotels, resorts and inns, though there are a few smaller motels. Rates during the summer can be expensive as a result of demand. Its proximity to the San Francisco Bay Area means that it has a strong weekend orientation.

Napa's primary attraction is wine, including wine tasting and wine retail, though the destination also boasts restaurants, a vibrant arts scene, shopping, spas and outdoor recreation, along with a robust events calendar. The regional tourism promotion organization, Visit Napa Valley, has positioned the destination as 'Legendary Napa Valley', with an emphasis on premium positioning to boost revenue.

In 2012, Napa Valley's tourism industry generated \$51.7 million in tax revenues.¹

Napa owns both wine country and food & wine positioning.

Primary Destination Drivers

Wineries – Napa has over 400 wineries, 95% of which are family owned and operated. Big names include Robert Mondavi, Cakebread, Rutherford and Franciscan Estate.

Food – Napa is home to the Culinary Institute of America (CIA), an outpost of the famed cooking school located in St. Helena. It is also home to famed restaurants including the French Laundry, numerous farmers' markets and unique food venues like Oxbow Public Market in Napa.

Events – Napa's event roster ranges from concerts and musical performances to film festivals to food and wine events.

New Investments/Elements

Similar to many other destinations in California, Napa has established a funding mechanism specifically for tourism promotion. The Napa Valley Tourism Improvement District was formed in 2010, and is funded by a 2% assessment on lodging businesses.

¹ Napa Valley 2012 Economic Impact Report, Destination Analysts

Visit Napa Valley launched a website redesign in Fall 2012 in an effort to create a more engaging site through additional content, landing pages and SEO.

Strengths

- Strong wine country branding
- Global wine destination
- Events
- Upscale image
- Napa has highway access to core northern and central California markets as well as air access via Sacramento, San Francisco and Oakland International airports
- Food & wine
- TBID ensures sustainable tourism promotion funding

Weaknesses

- Congestion
- Weekend orientation
- Perceived costs
- Lodging supply weighted towards higher end
- Non-wine activity messaging not as strong

Key Issues

- Focus on wine and food may be intimidating to certain segments
- How do differentiate from its neighbor Sonoma?

Access/Transit

- All weather highway. Commercial air access via San Francisco and Sacramento. Private air access via Napa County Airport.
- Napa County Transit

Major Special Events

- Significant focus on wine and food events (i.e. Napa Valley Wine Festival, Flavor Napa Valley)

Other

- Official wine region of Americas Cup

The Median Home Sale Price is 290,000 this compares to the country median home sale price of 214,200.	
Average Household Income	\$ 84,128
Per Capita Income	\$ 31,350
Median Disposable Income	\$ 55,453
Median Age (years)	38.81

Source: American Towns

Sonoma

Sonoma County is located north of San Francisco along the Pacific Coast. It is the largest wine producing region in California's Wine Country, with over 370 wineries. It is also home to a productive agriculture region, as well as groves of California Redwoods and 50 miles of coastline. Its varied geography includes the Sonoma mountains, the Sonoma, Alexander and Dry Creek valleys, Bodega Bay and numerous marine protected areas off the Pacific Coast. Such variety translates into different microclimates and ecosystems within the destination, and accounts for its rich agricultural heritage.

Sonoma is served by the Charles M. Schultz Sonoma County Airport as well as San Francisco International Airport and Oakland International Airport.

The destination has a range of lodging options including motels, hotels and campgrounds. Its proximity to the San Francisco Bay Area means that it has a strong weekend orientation.

Its primary attractions are wineries and wine, though it also has robust agricultural offerings including farm-to-table dining and farmers markets as well as varied outdoor recreation.

Sonoma's recent positioning, "We are Sonoma County", is attempting to differentiate the region as unique among wine regions², and is working with local wine growers and vintners on this branding campaign.

Primary Destination Drivers

Wineries and wine – Sonoma County is home to 15 different AVAs, each with different soils and climate, along with 370 wineries.

Food – Sonoma's agricultural heritage translates into farm-to-table dining and farmers markets throughout the region. It includes both products grown as well those harvested from the ocean.

Outdoor recreation – Sonoma is home to a Redwood tree reserve, numerous state parks and coastline areas to explore on foot, kayak or bike.

New Investments/Elements

In 2005, Sonoma County established a Tourism Business Improvement Area (TBIA), which included a 2% assessment on lodging. The Sonoma County TBIA accounts for approximately 66% of Sonoma County Tourism's budget.

Strengths

- Global wine destination
- Natural beauty

² Sonoma County Tourism, Press Release "Sonoma County Tourism, Vintners, and Winegrowers launch new Sonoma County brand mark and marketing campaign"

- Upscale image
- California coastal location
- Food & wine
- TBID ensures sustainable tourism promotion funding
- Sonoma has highway access to core northern and central California markets as well as air access via Sonoma, San Francisco International and Oakland International airports

Weaknesses

- Congestion
- Weekend orientation
- Perceived costs
- Not clearly differentiating its wine country from Napa

Key Issues

- Branding beyond California
- Focus on wine and food may be intimidating to certain segments
- How to differentiate from Napa?

Access/Transportation

- All weather highway. Commercial air access via San Francisco and Sacramento. Private air access via Charles M Schultz-Sonoma County Airport.
- Sonoma County Transit

Major Special Events

- Significant focus on wine and food events (i.e. Sonoma Wine Country Weekend)

Other

- Home of Sonoma raceway, major motorsports facility.

The Median Home Sale Price is \$405,000 this compares to the country median home sale price of \$214,200.	
Average Household Income	\$ 100,550
Per Capita Income	\$ 48,006
Median Disposable Income	\$ 57,355
Median Age (years)	38.76

Source: American Towns

Santa Cruz

Santa Cruz is located just south of the San Francisco Bay Area along the Pacific Coast. Its southern portion comprises the northern half of the Monterey Bay. While smaller than some other destinations, Santa Cruz boasts geographic variety in the form of rugged coast, mountains, redwood forests, and fertile agricultural land.

The Santa Cruz County vacation experience is best described as “active” and is unlike anything else available along the central coast. The area is characterized as both rural and urban, offering visitors a wide variety of activities with which to experience the area and local culture.

Santa Cruz County is rich in terms of providing an experience and reasons for people to travel. The unpretentious feel and development level of the area provides a unique respite for those visitors that seek a refuge from destinations that lack originality and authenticity.

Its lodging mix includes hotels and motels, though very few higher end properties. Its proximity to the San Francisco Bay Area means that it has a strong weekend orientation.

Santa Cruz is served by San Jose International Airport (30 miles away) and San Francisco International Airport (60 miles away).

Santa Cruz’s positioning is ‘Let’s Cruz. Whatever is an awesome thing to be up for.’

Primary Destination Drivers

Boardwalk, Roaring Camp, the Wharf & UC Santa Cruz – Santa Cruz’s signature attractions include the historic Beach Boardwalk with the Giant Dipper wooden roller coaster, the Wharf, an 1880’s style steam train that goes through the Redwoods and University of California’s Santa Cruz campus.

Beaches – Santa Cruz has 29 miles of coastline and beaches that are perfect for a variety of activities.

Outdoor recreation – Santa Cruz offers a wide variety of outdoor recreation opportunities, including surfing, mountain biking, road cycling, hiking, kayaking and boating.

Redwoods – Santa Cruz is home to the oldest stand of ancient Redwoods south of San Francisco, providing a unique opportunity for visitors.

New Investments/Elements

In 2010, Santa Cruz established a Tourism Marketing District (TMD). Currently the TMD assessment is \$0.50 fee per night.

Key Issues

- Lodging supply
- Branding

Strengths

- A wealth of natural assets including beaches and redwood forests
- Widely available recreation opportunities - the rural ambiance helps enhance the overall experience
- Iconic attractions including the Boardwalk, Wharf and Roaring Camp
- Highway access to core northern and central California markets as well as air access via San Jose and San Francisco international airports.
- Access to local wineries and wine tasting.

Weaknesses

- Weekend orientation
- Uneven lodging supply

Access/Transportation

- All weather highway. Commercial air access via San Francisco and San Jose. Private air access via Watsonville Municipal Airport.
- Santa Cruz Metro Transit System

Major Special Events

- Significant focus on wine and food events and recreation/beach events

Other

- Emphasis on surf culture.

The Median Home Sale Price is \$518,750 this compares to the country median home sale price of \$214,200.	
Average Household Income	\$ 87,626
Per Capita Income	\$ 36,027
Median Disposable Income	\$ 49,369
Median Age (years)	39.70

Source: American Towns

Monterey

Monterey County is located on the Pacific Coast. Its northwest section comprises the southern portion of the Monterey Bay. Monterey's scenic coastline includes Big Sur, 17 mile drive and Pebble Beach. It also encompasses the Salinas Valley to the east, a rich agricultural region.

Monterey draws visitors for its many attractions, including the Monterey Bay Aquarium and Cannery Row, its roster of special events, numerous outdoor recreation opportunities, parks and beaches, as well as food and wine.

Monterey County is served by Monterey Regional Airport which has 40 daily flights. San Jose International Airport is approximately an hour from Monterey and San Francisco International Airport is approximately two hours away. It is within a two hour drive of most San Francisco Bay Area markets.

The destination's lodging mix includes a balance of branded and unbranded hotels and motels, along with B&Bs, vacation rentals and campgrounds.

Monterey's primary target segments are the drive markets in San Francisco and central California. It is also looking at new segments with direct air service, including San Diego, Denver, Phoenix and Las Vegas. Internationally its focus is on Canada and China.³

Monterey's positioning, "So Much to Discover" is intended to overcome the objection that there is nothing new to see or do in Monterey.

In 2012, Monterey generated \$55 million in tax revenues.⁴

Primary Destination Drivers

Outdoor Recreation – Monterey's location makes it ideal for a variety of activities including kayaking, biking, hiking and golf.

Parks and Beaches - Monterey is also home to numerous city, county and state parks and beaches, including Big Sur and the Monarch Grove Butterfly Sanctuary.

Attractions – Monterey is home to many iconic attractions, including the Monterey Bay Aquarium, Pebble Beach and Raceway Laguna Seca.

³ Monterey County Convention & Visitors Bureau 2012-2013 Business Plan

⁴ Adams, Bonnie, "Monterey County Hotels Bring Tax Revenue", May 3, 2013, Monterey Herald, http://www.montereyherald.com/tourism/ci_23168755/bonnie-adams-monterey-county-hotels-bring-tax-revenue

Special Events – Monterey’s roster of featured events includes PGA golf classics, triathlon and marathons, mountain bike competitions, food & wine, and car racing events.

Food & Wine – Monterey County is one of California’s largest wine growing and producing regions, as well as home to regional food specialties including artichokes, mushrooms and seafood. The destination features a slew of food & wine events along with wine tastings, farmers markets and farm stands.

New Investments

The Monterey City Council recently approved a \$32 million upgrade of the city conference center.

Strengths

- Proximity to San Francisco Bay Area and Central California drive markets
- Strong attractions (Pebble Beach and Monterey Aquarium)
- Special events
- Variety of parks & beaches
- Food & wine
- Lodging mix

Weaknesses

- Weekend orientation
- Congestion
- Perceived costs

Access/Transportation

- All weather highway. Commercial air access via San Francisco and San Jose and Monterey County Airport.
- Municipal Transit System

Major Special Events

- Significant focus on wine and food events. World class auto show events.

Other

- Pebble beach is one of the worlds top gold courses.

The Median Home Sale Price is \$375,000 this compares to the country median home sale price of \$214,200.	
Average Household Income	\$ 82,155
Per Capita Income	\$ 44,889
Median Disposable Income	\$ 53,714
Median Age (years)	34.30

Source: American Towns

San Diego

San Diego is located on the Pacific Ocean, adjacent to the Mexican border. Considered the birthplace of California, San Diego has a mild climate, 70 miles of coastline, along with a varied geography that features both mountains and deserts. It boasts plentiful outdoor recreation, beaches, and a numerous signature attractions such as Sea World.

San Diego is served by the San Diego International Airport, which has over 500 daily flights. It is approximately a two hour drive from Los Angeles on major highways.

San Diego's lodging mix includes a variety of hotels and motels, along with vacation rentals, B&Bs, RV parks and campgrounds.

Tourism has become a primary industry for the area. As such, San Diego has a Tourism Marketing District, established in 2008, that raised over \$112 million in assessments during its five year trial period.⁵

San Diego's primary target segments include Los Angeles and Phoenix. Japan is a primary international market, as non-stop air service on Japan Airlines began in December 2012.

San Diego's branding is based on the combination of great weather, outdoor recreation, lifestyle and friendly locals, which is believed to 'elevate' visitors' moods and make it a unique destination.⁶ It currently uses "Happiness is Calling" as a primary message.

Primary Destination Drivers

Major Attractions – Sea World, the San Diego Zoo and Legoland are just a few of the many strong attractions San Diego offers.

Beaches – The destination offer miles of shoreline and recreation opportunities, including Mission Bay, Cardiff and Torrey Pines, among others.

Events – San Diego has a number of year-round signature events, including Comic-Con, the Rock n Roll Marathon, San Diego Bay Wine & Food, San Diego International Auto Show and Del Mar racing season.

Outdoor Recreation – The region's mild climate makes it ideal for a wide range of outdoor activities, including golf, road and mountain biking, surfing and boating.

New Investments

⁵ San Diego Tourism Marketing District Annual Report 2012

⁶ San Diego Tourism 2012 Annual Report

- Legoland opened a new 250 room hotel in Carlsbad in April 2013
- Aquatica San Diego™, a new SeaWorld waterpark, is opening June 2013
- There is a proposed expansion of the San Diego Convention Center

Strengths

- Proximity to Southern California markets
- Air service
- Beaches/coastal attractions
- Strong attractions (San Diego Zoo, Sea World)
- Variety of lodging options
- Laid back vibe

Weaknesses

- Weekend orientation
- Seasonality
- Congestion
- Perceived costs

Access/Transit

- All weather highway. San Diego International Airport.
- San Diego Metropolitan Transit System

Major Special Events

- Significant focus on cultural events

Other

- Major league baseball, strong corporate travel.

The Median Home Sale Price is \$299,000 this compares to the country median home sale price of \$212,400.	
Average Household Income	\$ 88,789
Per Capita Income	\$ 34,858
Median Disposable Income	\$ 53,232
Median Age (years)	34.63

Source: American Towns

Mammoth Lakes

Mammoth Lakes is located in Mono County, on the east side of the Sierra Nevada, southeast of Yosemite National Park. It can be accessed via Highway 395, an approximate 7 hour drive from Los Angeles and San Francisco. Mammoth's high elevation and surrounding mountains makes it appealing for high elevation athletic training. Its location also means it is not easy to access in the winter, as many of the roads that access Highway 395 cross high-elevation passes and are closed during the winter months.

Similar to other winter destinations described in this section, Mammoth began as a mining town, though it is better known today for its skiing and outdoor recreation. Tourism is Mammoth's main industry, and in the winter skiing serves as the economic driver. Mammoth also boasts great scenery, as it is surrounded by the mountains of the High Sierra. It is also near a number of natural hot springs and wilderness areas.

Mammoth Lakes is served by the Mammoth Yosemite Airport, a primarily general aviation airport that provides commercial air service via Alaska and United. Air service is available on a daily basis from Los Angeles, San Francisco and San Diego, and four days a week from Orange County. It should be noted that the airport is very weather dependent, and as a result flight delays and cancellations are not uncommon.

Summer activities in Mammoth are plentiful. In addition to the mountain biking trails offered at Mammoth Mountain, there is also sightseeing, fishing, camping, hiking, climbing, golf, road biking and shopping.

Mammoth's summer attractions include Mammoth Mountain, Devils Postpile National Monument, Lake Mary, Ansel Adams Wilderness, Yosemite National Park, Mono Lake, Bodie Ghost Town and Inyo Craters.

Mammoth's event calendar includes signature events like the Mammoth Festival of Beers and Bluesapalooza and the Mammoth Lakes Jazz Jubilee. During the winter months, Mammoth offers ample recreation, including skiing, snowmobiling and snow play.

Mammoth's lodging supply is heavily weighted to condominiums, though it does have a number of small hotels and motels

Mammoth Lakes Tourism is the official destination marketing organization for the region, though Mammoth Mountain also implements its own marketing programs. Current Mammoth Lakes Tourism messaging is 'Come as you are. Do what you want.'

Mammoth's largest target segment is Southern California, though with the advent of air service it has begun to focus on Northern California. Internationally Mammoth Lakes and Mammoth Mountain focus on the United Kingdom and Australia/New Zealand.

Primary Destination Drivers

Outdoor Recreation – From mountain biking Mammoth Mountain's lift served singletrack to hiking in nearby Ansel Adams Wilderness, outdoor recreation opportunities abound. Golf, hiking, camping, mountain climbing, running, and road cycling are just a few examples.

Attractions – Mammoth is close to a number of primarily outdoor attractions including Mammoth Mountain, Devils Postpile National Monument, Yosemite National Park, and Mono Lake.

Events – Mammoth's summer event schedule includes concerts, food & wine, and art festivals.

New Investments/Elements

No new investment - Mammoth Lakes has not invested in any improvements since the economic downturn, not helped by its recent bankruptcy settlement. The lack of continued investment could be problematic if competitors do upgrade infrastructure and amenities.

Recreation Commission – Despite the lack of recent investment, a Recreation Commission has been established in order to begin the Recreation Facilities Planning Process. The Commission is developing a five+ year capital project, focused solely on recreation and arts. The project division encompasses three phases and was scheduled to start January 2013.

Tourism Business Improvement District (TBID) – Mammoth is also exploring setting up a TBID, and new funding for this could put Mammoth's tourism budget over \$5 million.

Key Issues

Access - Getting to Mammoth Lakes can be challenging for people coming from major metropolitan areas, in comparison to the easier access to North Lake Tahoe via Reno-Tahoe International Airport, or via Interstate 80 from San Francisco. Options are either a 7 hour drive, or air service to an airport that can be very weather dependent.

Bankruptcy Dismissal - The town of Mammoth Lakes filed for bankruptcy in 2012, facing a deficit of \$2.2 to \$2.5 million in its annual budget of \$18 million. The bankruptcy was dismissed, so Mammoth will be forced to make up the projected annual deficit moving forward.

Strengths

- Scenic location
- Diverse summer recreation opportunities
- Potential TBID funding

Weaknesses

- Difficult to access
- Mammoth Lakes precarious financial situation
- Dependence on Southern California market
- Crowded (peak weekends)
- Lodging mix

Access/Transit

- All weather Highway 395
- Mammoth Lakes Airport (Limited service)
- Mammoth Area Transportation System

Major Special Events

- Significant focus on music and recreation events

Other

- Strong recreation focus including a major trail system.

The Median Home Sale Price is \$272,317, as compared to the country median home sale price of \$212,400.	
Average Household Income	\$ 77,043
Per Capita Income	\$ 30,486
Median Disposable Income	\$ 46,061
Median Age (years)	37.42

Source: American Towns

Winter Destinations

Summit County, Colorado

Summit County is located west of the Continental Divide off Interstate 70, approximately an hour's drive from Denver. The county, situated in what is considered the heart of the Rocky Mountains, is recognized as a ski destination, as it is home to four major ski resorts, Keystone, Breckenridge, Copper Mountain, & Arapahoe Basin, as well as six towns (Frisco, Dillon, Breckenridge, Silverthorne, Blue Ridge and Montezuma). Approximately 80% of the land in Summit County is publicly owned⁷.

The area is rich in gold rush and mining history, though is better known nowadays for skiing and outdoor recreation. The county's high altitude (lowest elevation is nearly 8,000 feet), mountainous terrain and ample public land make it ideal for outdoor recreation. Summit County's proximity to Denver means it has a strong weekend orientation.

Summit County does not have a county wide destination marketing organization, instead leaving that to the individual towns and ski resorts. The Summit chamber represents business interests, but does not implement any regional tourism promotion.

Breckenridge, the county seat of Summit County, is a Victorian town located at the base of a ski resort. The town's many historic buildings reflect its mining heritage, which differentiates Breckenridge as a ski destination. The downtown area includes shopping, dining and lodging, creating a unique visitor experience.

The ski resort is 2,358 acres and receives an average of 300 inches of snowfall annually. While Breckenridge Ski Resort has had a number of owners since it opened in 1961, it is currently owned by Vail Resorts, which acquired it in 1996. The ski resort can be perceived as crowded and expensive, and the layout of the mountain is considered confusing, with flat terrain.

Copper Mountain features 2,435 acres, 126 trails and 22 lifts. The nearest town is Frisco, approximately 8 miles away, though Copper does have lodging in its base village. The ski resort was previously owned by Intrawest, and is now owned by Powdr Corporation.

Copper is perceived as having better runs and snow than Breckenridge. It is also seen as having a less pretentious atmosphere when compared to other Colorado ski resorts. Similar to Breckenridge, Copper Mountain has issues related to access during peak times, not only on the mountain, but also on the road.

With over 3,000 acres, 135 runs, 20 lifts, and an average annual snowfall of 235 inches, **Keystone Ski Resort** is the largest ski resort in Summit County. It is a family friendly ski resort, evidenced by its focus

⁷ Summit County, Colorado website, <http://www.co.summit.co.us/index.aspx?nid=570>

on condominium lodging units. Since Keystone focuses on family vacations, it offers a wide assortment of activities that cater to kids.

Most travelers view Keystone as a family friendly destination with intermediate terrain, good terrain parks, proximity to Denver and an affordable price point. However, the lack of nightlife detracts some potential customers.

Arapahoe Basin – Located on Loveland Pass on the Continental Divide, Arapahoe, also known as A-Basin, is the smallest resort in Summit County at 960 acres, but has the longest ski season, often extending well into June. The ski area tends to attract a different type of skier than other Summit County resorts, as the terrain is more difficult and the amenities are less glamorous.

Primary Destination Drivers

Skiing and Snowboarding – Summit County is home to four ski resorts that offer visitors a wide variety of skiing and snowboarding experiences. Three of the four ski resorts have significant infrastructure for destination visitors, including lodging, transportation, and dining and shopping opportunities.

Woodward at Copper – This unique indoor training facility offers snowboard, ski, skateboard, and digital media programs along with a 19,400 square foot indoor playground with artificial jumps into foam pits, jib lines, skate bowls and mini ramps, foam pits, spotting belts, and Olympic fly-bed trampolines.

New Investments/Elements

In the last couple of years, **Breckenridge** has made a number of investments. It plans to open 543 acres of new terrain in the Peak 6 area by 2013-14 ski season. During the 2011-12, luxury ski in/out slopeside condos were built, along with a new Doubletree hotel.

In 2008 **Copper** opened up Woodward, a unique indoor training facility and camp for action sports, including skiing, snowboarding and skateboarding. It should be noted that North Lake Tahoe also has a similar facility, since a Woodward Tahoe opened up at Boreal in 2011.

In most recent years, Copper added a new high-speed quad and regraded Union Creek base area. It also entered into a new partnership with the U.S. ski team and built the U.S. Ski Team Speed Center at Copper, a facility that allows ski racers to train for downhill events like the World Cup.

Keystone has implemented a number of improvements over the past few years, including the renovation of The Keystone Lodge guest rooms, snowmaking equipment upgrade, and a ten year long Master Plan that includes lift and trail improvements. Additionally, 170 new residential units will be built around the River Run Village. The Keystone Lodge and Spa (A RockResort) opened its doors during the 2007-08 season. An eight – passenger gondola in the River Run Village opened during the 2008-09 season.

In 2008 **Arapahoe Basin** opened the 400 acre Montezuma Bowl, expanding its terrain by nearly 80%. Two years later it installed the Black Mountain Express detachable quad lift at the cost of \$4 million.

The ski resort is currently developing a 10 year Master Plan. Projects under consideration for the plan include include a zipline tour, a surface lift to access Montezuma Bowl, and increased snowmaking reservoir storage⁸.

The Median Home Sale Price is \$491,250 this compares to the country median home sale price of \$212,400.	
Average Household Income	\$ 89,745
Per Capita Income	\$ 39,209
Median Disposable Income	\$ 48,849
Median Age (years)	34.75

Source: American Towns

The Median Home Sale Price is \$386,500 this compares to the country median home sale price of \$212,400.	
Average Household Income	\$ 98,408
Per Capita Income	\$ 45,737
Median Disposable Income	\$ 60,776
Median Age (years)	31.83

Source: American Towns

The Median Home Sale Price is \$271,600 as compared to the country median home sale price of \$212,400.	
Average Household Income	\$ 86,479
Per Capita Income	\$ 38,772
Median Disposable Income	\$ 62,832
Median Age (years)	35.79

Source: American Towns

Key Issues

- I – 70 traffic
- Crowding
- Perceived costs
- Infrastructure at some ski resorts
- No unified regional brand or tourism promotion efforts

Strengths

- Strong worldwide recognition amongst destination travelers
- Amount of ski resorts within the region
- Abundance of high end dining and lodging choices
- Proximity of midwest and eastern markets
- Proximity to major city (Denver) and airport (DIA)

⁸ Arapahoe Basin Press Release, "Arapahoe Basin Announces Proposed Master Development Plan Open House"

Weaknesses

- I-70 traffic
- Crowding
- Perceived costs
- Ski resort proximity to highway may come at the cost of scenic beauty
- No regional tourism promotion effort may result in fragmentation and inefficiencies

Access/Transit

- All weather Interstate 70
- Denver International Airport, Eagle Vail Airport
- Summit Stage

Major Special Events

- Significant focus on music, cultural and recreation events

Other

- High concentration of factory outlet stores

Mammoth Lakes

Mammoth Lakes is located in Mono County, on the east side of the Sierra Nevada, southeast of Yosemite National Park. It can be accessed via Highway 395, an approximate 7 hour drive from Los Angeles and San Francisco. Mammoth's high elevation and surrounding mountains makes it appealing for high elevation athletic training. Its location also means it is not easy to access in the winter, as many of the roads that access Highway 395 cross high-elevation passes and are closed during the winter months.

Similar to other winter destinations described in this section, Mammoth began as a mining town, though it is better known today for its skiing and outdoor recreation. Tourism is Mammoth's main industry, and in the winter skiing serves as the economic driver. Mammoth also boasts great scenery, as it is surrounded by the mountains of the High Sierra. It is also near a number of natural hot springs and wilderness areas.

Mammoth Lakes is served by the Mammoth Yosemite Airport, a primarily general aviation airport that provides commercial air service via Alaska and United. Air service is available on a daily basis from Los Angeles, San Francisco and San Diego, and four days a week from Orange County. It should be noted that the airport is very weather dependent, and as a result flight delays and cancellations are not uncommon.

Mammoth Mountain Ski Area is the main winter recreation provider. It is a 3,000 acre ski resort located in Mammoth Lakes that receives an average snowfall of 400 inches annually. Mammoth also owns June Mountain in neighboring June Lakes, which was shut down for the 2012/13 season. Other winter recreation activities include cross country skiing at both the Tamarack Cross Country Ski Center (owned by Mammoth Mountain) and Mammoth Lake Nordic Trail System, snowshoeing, snowmobiling, dog sledding, ice skating, backcountry skiing, sledding and snow play.

Mammoth's lodging supply is heavily weighted to condominiums, though it does have a number of small hotels and motels. While many of the hotels are independently owned, there are a few brand names, including the newest hotel, the Westin Monache, which opened in 2007. The ski area does have a village, located in town, with a gondola that accesses the mountain.

Mammoth Lakes Tourism is the official destination marketing organization for the region, though Mammoth Mountain also implements its own marketing programs, particularly in the winter. Current Mammoth Lakes Tourism messaging is 'Come as you are. Do what you want.'

Mammoth's largest target segment is Southern California, though with the advent of air service it has begun to focus on Northern California. Despite the driving distance from Southern California, Mammoth does have a strong weekend orientation, since many visitors see it as a 'local' ski resort option. As such, Mammoth Mountain has put a lot of emphasis on this segment, at the cost of diversifying its target audience mix. Internationally Mammoth Lakes and Mammoth Mountain focus on the United Kingdom and Australia/New Zealand.

Mammoth Lakes is a destination with a large ski resort with varied terrain, along with an array of diverse winter activities. That said, Mammoth can be overcrowded during peak holidays, and since there is only one mountain available (taking into consideration that June Mountain remained closed during the 2012/13 season), skiers and snowboarders do not have as much choice as they would in North Lake Tahoe.

Primary Destination Drivers

Mammoth Mountain – This is the main reason for visiting in the winter. While nearby June Mountain shares the same lift ticket and season pass, Mammoth Mountain's proximity to Mammoth Lakes, extensive terrain and high speed lifts mean that it attracts the bulk of the skier/snowboarder market.

New Investments/Elements

No new investment - Mammoth Lakes has not invested in any improvements since the economic downturn, not helped by its recent bankruptcy settlement. The lack of continued investment could be problematic if competitors do upgrade infrastructure and amenities.

Recreation Commission – Despite the lack of recent investment, a Recreation Commission has been established in order to begin the Recreation Facilities Planning Process. The Commission is developing a five+ year capital project, focused solely on recreation and arts. The project division encompasses three phases and was scheduled to start January 2013.

Tourism Business Improvement District (TBID) – Mammoth is also exploring setting up a TBID, and new funding for this could put Mammoth's tourism budget over \$5 million.

Key Issues

Access - Getting to Mammoth Lakes can be challenging for people coming from major metropolitan areas, in comparison to the easier access to North Lake Tahoe via Reno-Tahoe International Airport, or via Interstate 80 from San Francisco. Options are either a 7 hour drive, or air service to an airport that can be very weather dependent.

Bankruptcy Dismissal - The town of Mammoth Lakes filed for bankruptcy in 2012, facing a deficit of \$2.2 to \$2.5 million in its annual budget of \$18 million. The bankruptcy was dismissed, so Mammoth will be forced to make up the projected annual deficit moving forward.

Strengths

- Scenic location
- World-class ski resort
- Diverse winter recreation opportunities
- Potential TBID funding

Weaknesses

- Difficult to access
- Mammoth Lakes precarious financial situation
- Dependence on Southern California market
- Crowded (peak weekends)
- Lodging mix

Access/Transit

- All weather Highway 395
- Mammoth Lakes Airport (Limited service)
- Mammoth Area Transportation System

Major Special Events

- Significant focus on music and recreation events

Other

- Complete variety of winter recreation activities.

The Median Home Sale Price is \$272,317, as compared to the country median home sale price of \$212,400.	
Average Household Income	\$ 77,043
Per Capita Income	\$ 30,486
Median Disposable Income	\$ 46,061
Median Age (years)	37.42

Source: American Towns

Telluride, Colorado

Telluride is located in a box canyon in southwest Colorado, surrounded by the steep mountains and cliffs of the San Juan mountain range. It is accessed primarily via Route 145 in the winter.

Similar to other Colorado ski destinations, Telluride was a mining town that became a ski resort. As such, the town of Telluride is a National Historic District with numerous Victorian homes and buildings⁹. There are two towns in Telluride – the town of Telluride and Mountain Village, located at 9,500, which provides access to Telluride Ski Resort. The towns are connected via a free gondola.

Telluride Ski Resort is located in Telluride. It features 2,000 acres, and receives an average of 300 inches of snow annually. In 2008 the ski resort opened up Revelation Bowl, an above treeline area with advanced and expert terrain, expanding the ski area by 400 acres. Telluride Ski Resort positions itself as 'Culinary Mountain Resort', offering numerous unique dining opportunities on the mountain.

Telluride features a number of luxury hotel options including a Fairmont property. While lodging options can be found in both Telluride and Mountain Village, the higher end accommodations are primarily located in Mountain Village.

Telluride is served by two airports. Telluride Regional Airport is located approximately 15 minutes away from Telluride, and is the second highest commercial airport in the world at 9,070 feet. Montrose Regional Airport is located approximately an hour and 15 minutes from Telluride.

Travelers view Telluride as a great town and ski area, with terrain for all ability levels. Part of the charm of Telluride comes from its unique location, and that it is considered a premier Colorado ski resort.

Primary Destination Drivers

Telluride Ski Resort – Telluride's only ski resort option. At 2,000 acres, it's not large, but it has positioned itself as more than just a ski experience, but a culinary experience as well. Its isolated location means it is not easy, nor inexpensive, to access. It likely appeals to the destination skier that is looking for more challenging terrain, quiet luxury and something a bit off the beaten path.

Film Festivals – While not held during the winter months, two film festivals are held in Telluride every year. Mountainfilm in Telluride, started in 1979, is one of the longest running film festivals of its kind. Telluride Film Festival is an international film festival that focuses on new films, similar to the Cannes Film Festival.

New Investments/Elements

⁹ Telluride Tourism Board website

Telluride Ski Resort expanded more than 400 acres with the opening of Revelation Bowl. It has also improved the snowmaking infrastructure. With the ski resort's emphasis on food, recent developments have primarily focused on new on-mountain restaurants and capacity.

Telluride Regional Airport has added non-stop flights from 9 U.S. cities. Telluride's airport improvements account for \$50 million in runway improvements in order to make it safer and allow bigger aircraft to land.

The Hotel Capella, a luxury hotel with 100 units and 50 condo units, opened in 2008. It went into foreclosure in 2011. It has since been acquired and renamed Hotel Madeline Telluride. One of Telluride's other luxury properties, the Inn at Lost Creek, came close to foreclosure in 2011, but was ultimately saved.¹⁰

Key Issues

Telluride Airport - The biggest issue in Telluride is the airport. The airport is the highest airport in the U.S., which means it is very weather dependent. Visitors that choose to fly into Telluride are not able to land in many cases, or in other instances, because of the weight restrictions on the plane, the luggage ends up being delayed. The next closest option is to fly into Montrose Regional Airport and drive approximately 75 minutes to Telluride.

Strengths

- Infrastructure
- Luxury accommodations
- Ample dining options
- Far away from major interstate
- Laid back atmosphere
- Rich arts and culture

Weaknesses

- Lack of ski resort options
- Airport access is difficult
- Difficult to access
- Perceived as expensive

Access/Transit

- Poor access from major airport hub locations. Telluride Regional Airport.

Major Special Events

- Significant focus on events and festivals (Film Festival, Blue Grass Festival)

¹⁰ New West "Two Major Lodges at Telluride May Close"

http://newwest.net/snow_blog/article/two_major_lodges_at_telluride_to_close/C458/L41/

Other

- Focus on visitors being a Telluride local.

The Median Home Sale Price is \$447,500 this compares to the country median home sale price of \$212,400.	
Average Household Income	\$ 101,951
Per Capita Income	\$ 49,168
Median Disposable Income	\$ 54,439
Median Age (years)	35.72

Source: America Towns

Park City, Utah

Park City is located in Summit County, Utah, approximately 30 miles from Salt Lake City. The area also has a rich mining history, though tourism is the primary economic driver.

Park City started out as a mining town during the mid-nineteenth century. It was not until 1963 that Park City started capitalizing on its natural attributes. The first ski area built was a resort called Treasure Mountain, which later on became Park City Mountain Resort. Over the following years, Deer Valley and The Canyons were built. As of today, Park City has 3 resorts within five miles of each other, offering 8,800 acres of skiable terrain, 337 trails and 51 lifts. Adjacent resorts include Alta, Solitude, Brighton, and Snowbird. The destination is known for the quality and quantity of its snow, and the

Park City Mountain Resort was the first of the three, built in 1963. It has 3,300 acres, 116 runs and 16 lifts. It hosted the snowboarding events in the 2002 Winter Olympics, and also serves as training grounds for the U.S. Ski Team. It is owned by POWDR Corp, which also owns Copper Mountain.

Deer Valley Ski Resort opened in 1981. It has 2,026 acres, 100 runs and 21 lifts, and prides itself on providing an extremely high level of service. The ski resort is regularly named the #1 ski resort in North America in SKI Magazine reader surveys.

Canyons Resort is Utah's largest resort at 4,000 acres. It has 19 chairlifts and an annual average snowfall of 335 inches. Its parent company is Talisker Corp, though it was recently announced that Vail Resorts will run ski resort operations, having signed a 50 year lease.

Park City winter activities also include winter fly fishing, the Utah Interconnect Tour, sleigh rides, snowshoeing, cross country, snowmobiling, ice skating, snow tubing, heli and cat skiing.

Park City is also the home of the U.S. Ski and Snowboard Association (USSA), the parent organization of the U.S. Ski Team, U.S. Snowboarding and U.S. Freeskiing. Its national training and education facility is located in Park City.

Park City's free local bus system makes it very easy for visitors to get around the destination without a car. Daily bus service is available to the ski resorts, local lodging and downtown Park City. There is also a daily Trolley service that runs along Main Street.

Park City is seen as a town with great character, which hosts the Sundance Film Festival and offers amazing skiing. The town is considered hip and diverse, with many ski resort options along with easy access via Salt Lake City.

It should be noted that while Utah has had a perception of strict liquor laws in the past, a 2009 law relaxed the laws, allowing visitors to purchase alcohol without joining a private club. Utah's 3.2% beer is still the only option in "taverns, beer establishments and stores"¹¹.

Park City's destination marketing efforts are run through the Park City Chamber/Bureau. It uses its approximately \$3 million marketing budget to position the region as a world-class ski with easy access for its primary markets of New York and Los Angeles¹². Its target audience is the sophisticated, fun-loving visitor from the major U.S. ski markets. It capitalizes on its excellent air service with its Quick Start vacation program that allows a visitor to exchange a same day boarding pass for a lift ticket at any of the 3 Park City ski resorts¹³.

The destination's international target segments include the UK, Germany, Brazil, Mexico, Canada, Australia and New Zealand.

Primary Destination Drivers

Skiing/Snowboarding – Park City is home to three world-class ski resorts, Canyons Resort, Deer Valley Resort and Park City Mountain Resort, all located within a few miles of each other and connected via Park City's free public transportation system. Collectively the ski resorts feature over 8,800 acres of terrain, and own "The Greatest Snow on Earth" positioning.

The Utah Interconnect Tour – Park City's ski resorts are part of the Interconnect Tour, a full day guided hike/ski tour of six mountains at Deer Valley, Park City, Solitude, Brighton, Alta, and Snowbird resorts. This is a unique ski tour that is not found at any other U.S. ski destination.

Utah Olympic Park - This was the venue for the 2002 Winter Olympics for luge, skeleton, bobsled and ski jumping. It is now open year around, serving as both a training center for athletes as well as a tourist destination.

Sundance Film Festival – This annual event, held in February, is a world-class film festival that celebrates independent filmmakers. Over the years it has become a favorite Park City tradition for locals, visitors and celebrities.

New Investments/Elements

The town of Park City has developed a \$15 million plan for the Historic Park City main street area which features a 10-year reconstruction. Sidewalks, curbs, light posts, public plazas, and improved connectivity are all elements of the project.

¹¹ Utah Visitor website, http://www.utah.com/visitor/state_facts/liquor_laws.htm

¹² Park City 2011-2012 Marketing Plan video, <http://vimeo.com/26694869>

¹³ Barker, Gina, The Park Record, "Chamber marketing plan unveiled", July 13, 2012,

http://www.parkrecord.com/summit_county-business/ci_21071461/chamber-marketing-plan-unveiled

Most recently, Vail Resorts announced that has entered into a long-term lease with Talisker, allowing it to operate Canyons Resort. This will enable Vail to run the ski resort while Talisker holds onto its development rights for the real estate at the base of Canyons.¹⁴

Canyons Resort has invested \$75 million in recent resort improvements¹⁵, which include new chairlifts, new terrain and enhanced snowmaking, which are all part of the first phase of the re-creation of The Canyons. In 2012, the Hilton Grand Vacation Club opened a slope-side property on the resort, further enhancing the guest experience.

Park City Mountain Resort invested \$7 million on improvements during the 2011/12 winter season, including a dedicated area for beginners with two conveyor lifts, improved snowmaking and grooming equipment, along with the replacement of the 3 Kings chairlift. During the 2010/11 season, the resort doubled the size of Pick 'N Shovel Terrain Park, improved night skiing, added new runs and cats, and renovated part of the restrooms with Eco Toilets.

Deer Valley announced \$8 million in improvements for the 2012/13 season that included the replacement of Deer Crest Chairlift with a high speed chairlift, a remodel of the Snow Park Restaurant, a new deck with heated pavers at Empire Canyon Lodge, along with expanded snowmaking.

Key Issues

Talisker vs. Park City Mountain Resort - In 2012 Park City Mountain Resort filed a suit against Talisker to ensure it could continue to operate the ski resort on the land that Talisker owns. There had been a long time usage agreement for the land, and there was disagreement between the two whether the agreement had been renewed in writing in 2011¹⁶. The lawsuit has dragged on, and as of the present, is unresolved. For the past two ski seasons Park City Mountain Resort has had to include a caveat on its season pass sales that as a result of the Talisker conflict, the ski resort could be closed for all or part of the season.¹⁷

Ski Link - Ski Link is a proposed gondola that will link Canyons Resort to Solitude Mountain Resort¹⁸. The proposal, by Talisker, includes taking US Forest Service land and using it to build a private gondola to access the two ski resorts. Proponents suggest that this transportation project will provide economic benefits to the local community. Opponents, which include the USFS, Salt Lake County and numerous business owners, assert that this project is a land grab effort that will not truly serve as a transportation

¹⁴ Vail Resorts, "Vail Resorts to Operate Canyons Resort in Park City, Utah" , March 29, 2013, <http://news.vailresorts.com/corporate/vailresortstooperatecanyonsresortinparkcityutah.htm>

¹⁵ Ibid

¹⁶ Support PCMR website <http://www.supportpcmr.com/>

¹⁷ Hamburger, Jay, The Park Record "PCMR v. Talisker: season passes again sold with a caveat", May 3, 2013 http://www.parkrecord.com/news/ci_23167790/pcmr-v-talisker-season-passes-again-sold-caveat

¹⁸ Ski Link website <http://skilink.com/>

project, as users will be required to pay for a lift ticket, unlike Telluride's free gondola that runs between the town and Mountain Village.¹⁹

It is unclear how the recent agreement with Vail Resorts to operate Canyons Resort will affect either of these two issues.

Strengths

- Proximity and accessibility from Salt Lake City airport (600 daily flights)
- Non-stop flights from all over the U.S.
- Rich arts and culture
- Wide range of lodging, including high end
- Varied dining options
- Numerous world-class ski resorts

Weaknesses

- Perceived costs
- Liquor laws
- Potential impacts of lawsuits/development conflicts
- Perceived congestion

Access/Transit

- All weather Highway interstate 80, Salt Lake City Airport (Major Hub)
- Park City Transit

Major Special Events

- Significant focus on cultural, recreation, events and festivals

Other

- Sundance Film Festival creates significant Hollywood buzz. Vail Resorts recent purchase of the Canyons.

The Median Home Sale Price is \$500,781 this compares to the country median home sale price of \$212,400.	
Average Household Income	\$ 133,421
Per Capita Income	\$ 53,798
Median Disposable Income	\$ 63,853
Median Age (years)	37.84

¹⁹ Stop Ski Link website <http://stopskilink.org/>

Source: American Towns

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