



Mountain Travel Symposium

Lake Tahoe

April 2024

1. Overview

Mountain Travel Symposium is the largest and longest running annual gathering of mountain travel professionals in the world. Founded in the late 1970's and started with just 20 resorts getting together annually to discuss trends associated with the ski traveller. Now it is the largest gathering of mountain travel professionals.

In Tahoe, over 800 delegates from 24 countries attended. Destination Queenstown and RealNZ were the only destination or tourism/ski resort company from New Zealand in attendance. There were New Zealand based ski wholesalers there, for example – Mountain Watch Travel, Mad About Travel and Travel&Co. There was a significant increase in data, marketing and IT companies present this year.

The symposium is broken up in to four parts:

- Networking ski day and welcome function
- Trade exchange - connecting buyers (tour operators, wholesalers, online travel agents) with suppliers over a two-day period with companies from all over the world
- Forum sessions - one and a half days of speakers and breakout sessions that present thought leadership content for sales and marketing executives in the industry.
- Group exchange - one day of meetings speaking to leaders of ski clubs and councils who are keen to learn about resorts for their upcoming group trips.

Next year the MTS event will take place in Snowmass Village, Colorado 7-13 April 2025.

2. Market Overview

The United States is currently New Zealand's second-largest international visitor market.

Visitor numbers from the US on are on the rise due to increased air capacity and more direct airline routes.

There are nine carriers flying to NZ (7 direct/2 indirect) from eight North America gateways (Vancouver, San Fransico, Los Angeles, Houston, Dallas, Chicago, New York, and Hawaii). Three new routes – Dallas and New York launched in 2022 and San Fransico to Christchurch in 2023. This has enabled significant capacity increase Jan 2024 is +121% vs Jan 2019 with 16,000 more seats. Two new year-round services have also been introduced Qantas JFK-AKL (June 2023) and Delta Airlines LAX-AKL (March 2024). Data suggests that no American is less than two hours away from a domestic airport that would route through one of these ports.

Tourism New Zealand's latest research shows there are 50.6 million active considers (Feb 2024), while there are 7.2 million active considers in Canada that would consider visiting in the next three years.

The distribution of active considerers from largest to smallest volume – South 37%, West 30%, Midwest and Northeast both 16%.

The US economy is strong, while Canada is gaining momentum. Job creation and economic growth have been stronger than predicted and inflation has declined faster than expected, all resulting in strong consumer confidence and optimism regarding the economy.

The presidential election may fuel uncertainty and slow travel growth as elections can usually lead to reduced consumer confidence and discretionary spending.

Research shows us that the US has one of the strongest travel recovery rates globally with monthly outbound travel by US citizens has continued to exceed 2019 volumes since September 2022. American travellers report they intend to spend more on travel in 2024, with 32% indicating they will take an international trip in the next 12 months.

Despite economic pressures Americans continue to prioritise travel, targeting new destinations. High costs and lack of leave are the top impediments for Americans to travel. Travelers are prioritizing experiences and travel over material goods and continue to focus on the 'value' of a trip, leaning towards taking fewer trips and staying longer to immerse themselves in a destination. Strength of the US dollar also continues to make international destinations more attractive.

3. Event Objectives & Benefits

In the search for Destination Queenstown to uncover and engage with high contributing visitors, it is very apparent that the mountain resort community resonate with our objectives. From looking at longer length stays, high engagement/contribution to the community, respect for nature and New Zealand's unique diversity and outdoor environment.

Key messages shared also included how New Zealand has never been more connected by airline capacity from North America. To the exchange rate being favourable for them to travel.

Across the event delivery it was apparent that not all appointments were specific to winter travel, with many looking at and enquiring for out of winter travel, which gave the opportunity to ensure address for the proposition of shoulder season travel.

It was also of benefit to deliver this event in conjunction with Gerladine McMillan from RealNZ. I could focus on our regional proposition, destination overview/portfolio of product and connectivity, while Geraldine could cover experiences on the ground.

It was apparent from attending MTS for a second year in a row, the momentum and additional contacts was significant.

4. Attendance/Attendees

Trade Exchange – partner appointments:

Nancy Flores – New Travel Service	David Benzimra – WeSki
Tomasz Pudelko – Wygoda Travel	Kelly Klett – Travel Whisperer
Kate and Anna – Mountain Travel Watch	Dan Rowan – Hopper
Cassie and Rodney – Ski Max	Robert (Bob) Rosensteel – Snow Tours
Melissa Cowley (Owner) – Ski Travel Company	Andy Knights – Ski Safari
Maaikie Fraser – Mogul Ski World	Maria Isabel De Julian Alvarez – El Major Esqui
Jerry Brown & Marisol Ramirez- Reslogic	Mike Pritchard – Born to Ski
Dan Walker – Sno’n’Ski	Tatiane Souza – Teresa Perez Tours
Torey Edgecomb – World Citizen Travel	Maria Lopez – Heidi
Shannon Beattie – Ski Canada	Sean McEarlean – Holidayze
Edward Puglia – Air BnB	Pete Kovacevic – Alpine Adventures
Rob and Sheree – Travel &Co	Sylvia Schmiedl – Travel Plan Australia
Rich Bryant – Zartico	Brenda Lyttle – Epic Pass
Gary Nicoll – Alpine Adventures	Florian Hermann – Hermann Global
Doug Fish – Indy Pass	Yair Pantoja – De Gala Tours
Chase Jones – Adara A RateGain	Daniel Evans – Snow Forecast

Group Exchange – partner appointments:

Kerry Huffstutler – Los Amigos Ski & Travel	Book via Holidayze, Autumn 2023 to NZ 140 guests, typical group 20-60. Will consider NZ for ski and non-ski
Anna – Sanctuary Ski and Snowboard Club	NZ trip on the cards, winter 2025 – would want all experiences ski and non-ski. Group size 25. 1-2 international trips booked per year.
Sarah – Probus Ski Legends	Toronto based, Linda from Merit Travel booking agent, winter 2026. Average size 20-50 people.
Mike Erie Ski Club	Small group, spring 2025, would be ski and non-ski (RealNZ experiences, group size 30-50 people.
Eleonora – Jacksonville Ski Club	Winter 2025, book via Holidayze and Alpine Adventures, Group size 20-50 people.
Peter – Sitzmark Ski and Social	Summer of 25/26 RealNZ experiences to be included, 30-35 people
Heike – Dayton Ski & Board Club	Been to NZ, knows us well, 30-40 people, NZ planned in 25 or 26.

Snow Adventure Club of the Carolinas	NZ winter 2026, approx. 40 people
Nationwide Ski Groups	Came to NZ Sept 2013, ski and non-ski, 20-30 people. NZ on table again for booking.
Palm Beach Gator Club	NZ was booked, cancelled due covid, ski and non-ski, 30-40 guests, likely to be back 2026.
Ski Club Washington DC	Looking at August 2026, 30-40 people, average age is 70, many non-skiers.
San Diego Council of Ski Clubs	Was in NZ in 2019, group size 20-30 people, wants to come back.
Chicago Metropolitan Ski Council	Coming in winter 2026, ski and non-ski, average size 80+ (across 62 clubs).
Eastern Pennsylvania Ski Council	Will be ski and non-ski, 25-80 people, skiing incorporated but not a highlight.
Crescent Ski Council	Trip bid in 2026 NZ vs Portugal.
Cleveland Metro Ski	Winter 25/26, 40-60 people.
Metropolitan Detroit Ski Council	Winter 2024.
Florida Ski Council	Aug 2026 if for ski, March 2026 if non-ski.
70+ Ski Club	Came to NZ last year. 2026 second visit, looking at 30-40 people.
Ski Cruisers Ski Club	NZ Summer 2026, 26-28 people.
Birmingham Ski Club	Non-ski, 10-day itinerary, average group size 40 people, bucket list destination for members of the club.
Bohemia Travel	Only international, ski and non-ski, group size 20, Aug/Sep 2025.
Columbia Ski Club	Last trip to NZ 2008, pitching winter 2026, 30-40 people.

Orlando Ski & Travel Club	Came to NZ 2019, average group size 30. Very keen to return 2026.
Kevin Gill Group	Has done a famil with Alpine Adventures, only into non-ski, 30-40 people. Keen interest, no commitment on dates yet.
Sitzmark Ski Milwaukee	NZ on the list of international destinations but no set timeframe.
Little Rock Athletic Club	Typically domestic, haven't been internationally yet. From presentation keen to pitch NZ in their trip planning.
Sandusky Ski Club	NZ is on the list. Average trip size 40 people.
Out of Control	NZ Bucket list destination is going to pitch for members, 15-20 people.
Ohio Valley Ski	Visiting Queenstown in November, 48 people.
NW Ski Club	Looking to visit 2026.

5. Panel Discussions & Industry Forums

Jared smith - CEO, Alterra Mountain Company (IKON PASS)

Resort industry to prepare for next impact (whether next global pandemic or weather event). The start of the 23/24 season opened on 90% snowmaking, which put them on the backfoot with a loss of momentum that added pressure for them to make up for the remainder of the season (cost cutting decisions were constant). The last 3 months (Jan-Feb-Mar) of the season they received great for snowfall around their resorts and good weather which helped make up their late start. They have received both good and bad weather years. One of their key future projects is focusing on more efficient use of water, using less at higher temperatures to round out weather volatility. While also ensuring they take the money made from a good season and invest in new infrastructure to keep an attractive proposition.

Other key points:

- Alterra operate things different from Vail Resorts. Every resort reports to a leader based 'on mountain' to keep things relevant. That leader makes decisions based on operational needs and investment. Alterra helps and supports with scale, services, and tech to help with overall guest experience.

Question asked - How do you go from marketing to stewardship and being responsible for tourism and visitor flow. How do you balance the need for tourism when frustration from communities has reached its peak.

- Multi-mountain passes have never been cheaper. Unbelievably affordable but never been more crowded.
- Responsibility to find a balance. Alterra approach a little different. They make passes more expensive to cap numbers. They do not want to sell unlimited passes.
- Steamboat visitation has increased 20%, they have added more infrastructure to balance capacity with sales of the mountain.
- They have seen an increase of mid-week usage, and are asking the question – is it a pattern or behaviour driven i.e. hybrid work from home that enables flexibility to visit the mountain when supposedly quieter etc.
- Review of all CSR. Individual mountains will be limited on resource for CSR, but Alterra can support and invest to carry out those changes than an independent resort otherwise might not be able to do.
- Alterra are focussed on how to attract more people to the mountain i.e. take a lesson and they'll give two days of lift tickets. They are finding ways to convert, that encourages guests to return.
- They have 230 chairs across the company's portfolio. Average cost for a chairlift 15 years ago was 8 million, now 15-16 million. The average age of lift is 30 years.
- Business eats capital – chairs, buildings, groomers, the list goes on. They need to educate people on investment and the cost to operate a mountain resort.
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Key Metrics and Measures, panel discussion *North American data*

Chad Dyer – Global Managing Director, On The Snow/Mountain News

Pete Comeau – Managing Director, Phocuswright

Chris Klauda – STR/CoStar

Tom Foley - Inttopia

Pete Comeau – Managing Director, Phocuswright

- Global travel market size 1.8 billion in revenue. We have moved past the phase of pent-up travel demand.
- Average 3.2 trips same as 2019 (3-5 trips per year). Half worked remotely and half incorporated some aspect of business on a trip.
- Destinations increasing in interest is lakes/rivers and mountain travel.
- Not all data for interest does fully relate to consumer behaviour as other trips can take president i.e. visiting friends and family.
- Sustainability is it a buzzword. 41% looking for sustainable options over price, amenities, location etc.
- Chat GPT over 1 million people used in one week in comparison to what took Airbnb two years to get that number. We are only 18 months into using this technology.
- Chat GPT is being used to help plan a trip.

Chris Klauda – STR/CoStar

- Benchmarking company - daily revenue supply and demand 190 countries across 77000 hotels.
- ADR increases slowed setting winter gains just below inflation. Stabilising and returning to normal.
- Canada is slower to recover.
- Americans are fleeing internationally but the inbound tourist to the USA hasn't recovered, this is potentially due to strong USD. Concern here will be securing airline routes if plans are not full in both directions.

Tom Foley – Inntopia (23/24 seasonal trends and metrics)

- Room nights that are available has increased, inventory coming back (mostly apartments)
- Arrival day FRI-SAT in decline, while SUN-WED has increased.
- Room rates have peaked and stabilised.
- ADR increase but occupancy down (4%). Similar feedback from NZ ITO's yield up/volume down.
- Inflation sticky, interest rates may not come down this year.
- International travel wanes as US market visits Europe but less Europeans are coming to the US.
- Mountain community - Less spend to holiday with even though lower occupancy has higher yield/ADR due to inflation and cost of living.
- Mountain travellers earn more and are more insulated from economic impacts.
- Trend outlook is that rates for travel will continue to rise.

The Customer Experience

Coleen Weiss - East West Hospitality

Justin Heckmann - Club Med (National Director of Sales)

Dan Sherman - COO ski.com

Key points:

- Number one goal is to have happy clients, want people to come back (repeat visitation lifetime spend)
- Guests should be able to book easily, know they are in the right place to book, no automated responses or transferring multiple times between departments.
- Companies need to deliver exactly (or more) than what the customer has been sold.
- Customers want recognition and memorable moments.
- Not all guest experiences that are negative are based on something broken, not delivered, wait times or tech issues.
- Guest experience should start from the moment potential guests sees your marketing, not once they are in the experience, right through to payment, post visit marketing.
- We should always be working on customer experience.
- Should have an empty seat at every meeting that represents the voice of the customer.
- Guest experience team should include someone from every department touches the client from marketing team, sales team, operational, maintenance, payment/account not just sales and marketing!
- Leaders need to be able to create listening opportunities with our guests, read the chats. Sit in on phone calls. Go on experiences talk to guests - doesn't need to be super high tech, just listen.
- Have a system that knows if you're guest is a repeat customer (E.g. hotel check in "have you stayed with us before?")
- The ability to act quickly on a customer complaint or feedback will be a key factor to success or failure.

How do you measure ROI on the investment you put into guest experience?

- Return guest discount program uptake easy way to measure.
- Sales closure rate increases

- Customer service issues going down.
- Brand recognition
- Referral to friends and family

Gen AI [Matador Network](#) - Ross Borden

Guide Geek.com, launched March 2023, already at 1.3 million followers. In their first week over 1 million people had tried Guide Geek. Currently the number 1 Travel Specific AI platform.

Key Points:

- 65-85% of travellers interviewed knew of and or used AI to help them plan their trip.
- Don't underestimate how drastically GenAI will change the industry.
- It will be as big as social and potentially the internet.
- The answer will no longer be Meta, Microsoft, or Google
- There's never been a time when three Mega companies have pivoted their strategy to implement AI
- Gen AI will eat the Travel funnel.
- 27% of Guide Geek users research whilst in market for activities and dining options.
- Airbnb want to be the largest AI travel company – the AI company start-up they bought, the founder started Siri and sold to Apple.
- Your content is key – feed the beast with your information to reflect your brand and proposition, than others enabling or disabling your content.
- Manuals and consumer files can be loaded into AI, the more structured the data it will support turning into more comprehensive answers being searched for.
- Natural language – the smartest companies in travel are focused 100 percent in natural language.
- Trip advisor is on the way out! Too complicated.
- Multilingual – the world of google translate is over!
- In the next 2 years the world will be dominated by a network of a subject specific AI.
- Believes that 90-95% of content generated on the internet in the next 4 years will be AI generated content.
- Companies that are using AI as early adapters will be ahead of the curve and be stronger in their field in the long run.
- Don't over test or over think with Gen AI we all need to adopt a move fast and break things mentality.
- Guide Geek is creating a white label version for DMOs / RTOs.

ZARTICO - Nicole Brownwell

Zartico's mission is to empower destinations to be better stewards of the world's places through improved data intelligence and decision-making. They are the makers of the first Destination Operating System®, Zartico harnesses and streamlines complex data to provide a full spectrum of data science, benchmarking, and analytical services for use in marketing, community development, and sustainability efforts.

Key points:

Using Geolocation data, they can provide quantitative and qualitative insights to gain perspective so that you can zoom out to see your subject with clarity using modern data science.

Work with over 300 destinations.

Four key areas of focus using these strategies –

- o Destination Leadership (guiding your community forward)
- o Demand Optimisation (creating your balanced visitor economy)
- o Impact Reporting (leveraging your performance trends as a catalyst for future action)
- o Marketing Strategy (maximising your return on investment with calculated results - providing a responsive approach than reactive)

They provide actionable data intelligence to discover high-value visitors and visitation patterns by season, geography, and type. You don't get paid on impressions (volume) but quality of the visitor (value).

Leverage product data to identify product gaps, so that you can create product for your prosperity.

Impact reporting – leverage your performance trends as a catalyst for future action.

Marketing Strategy – maximising your ROI with calculated tactics. Enabling DMOs to precisely reach and engage the ideal visitor through tactics that represent brand, resonates with the target audience, and converts to a quality visit.

Building profiles for precise targeting: quality visitation (not just visitation), quality origin markets (our targets), quality spending (spend where we need it), destination engagement (behaviours matter), website inspiration and arrival (more motivators to visit), period and capacity level load (balance is essential).

Zartico expect in the next 6-8 months they will be ready to look at DMOs outside of NAM.

<p>The State of the US Ski and Summer Travel Industry and Travel Trends for Mountain Destinations. Mountain Lodging Hospitality Trends</p>

Key points:

- Most influential decision factor in lodging choice is:
 - Price and location were the most influential decision factor in lodging choice overall.
Convenient location, free Wi-Fi, previous experience came closely after
- Increased number of people staying with friends and family – potentially result of price pinch with families and middle income.
- Price sensitivity looks to be peaking.
- Data and search history shows that people are comparing prices between hotels before booking, including STR's (short term rentals).
- Data shows the steep increase post covid has hit a ceiling, dynamic pricing/location of lodging.

- Data also shows people booking later – in the ski industry, trends show much later booking due to people waiting to see what the snow conditions are like.

Locals' vs Tourists:

Inntopia doing a lot of research in small mountain or tourist towns to investigate data to support the rise of the resident, not necessarily looking for a resident economy looking for more focus on supporting residents.

Mammoth Lakes – 93% felt tourism important, 35% felt it made their life better. However less than 15% associated the improvements to the community or benefits in infrastructure to the tourism industry.

Traveller Trends:

- Primary reason for US travellers to travel on their last trip – Rest and Relaxation.
- Rate pressure came about when inflation increased, so people had less disposable income. People still travelled but dipped into savings or loaded on debt options.
- 34% of US travellers who travelled in 2023 travelled were to international destinations, only 1% of this was to NZ.
 - 12% Europe
 - 11% Caribbean
 - 9% Mexico
 - 7% Canada
- The most popular reason for the US traveller to travel in 2023 was to visit Natural Attraction. Data shows intention to visit lakes, rivers, mountain's, hiking and all-inclusive resorts or holidays has increased.
- Asked if forced to cut travel spend the most common reactions were:
 - Travel during of season (30%)
 - Take fewer trips (29%)
 - Spend less on events and shopping (24%)
 - Eat in lower priced restaurants (23%)
 - Chose lower priced destination (19%)
 - 50% of travellers said they may travel less travel due to high costs.
- Travel continues to sit at the top of discretionary spend, as these funds decrease, they will limit things like dining out, upgrading cars.

Destination Stewardship (panel discussion)

Tara Hetz – Author Lake Tahoe Destination

Tony Karwowski – President Lake Tahoe Community Alliance

Devin Middlebrook - Government Affairs Manager Tahoe Regional Planning Agency

Key points:

- A process by local communities' governmental agencies and the tourism industry

- Take Multi stakeholder approach to maintaining the cultural environmental economic aesthetic integrity of their country region or town.
- Destination Marketing – Destination Management – Destination Stewardship (involves so many more stakeholders and inviting them to the table).
- 2022 - 2 million visitors, 17 million visitor days. 27% population growth over the next 20 years.
- Challenges and considerations: 5 states, 2 countries, multiple towns and DMO's – a lot of people to get in a room and agree on a plan. Scenarios like: 12 million people in nearby surrounds that could drive here in less than an hour on a powder day – how do we manage situations and instant demand like that?
- Three-year process to move towards the Plan from planning, implementation, and launch.
- Workforce housing, transportation – two of the biggest challenges to the resort community in Tahoe
- Pain points are very similar to Queenstown / Wanaka
- South Lake Tahoe now has a plastic water bottle ban (no water bottles sold in any supermarket, store or gas station in South Lake Tahoe)

Underlying trends:

- Shift from marketing to management.
- Covid shift to remote work.
- Inflation, weak economy, weather patterns
- We have issues!

Public engagement:

- 1,1000 responses to resident survey
- 2,300 responses from visitors

Implementation - Three pillars:

- 1) Economic health**
Collaborate with local businesses and community stakeholders to positively impact the economic health of the region focusing our efforts on fostering a continually thriving community.
- 2) Community vitality**
Centre for our efforts around the community and the preservation and enhancement of culture being true to our culture and residents.
- 3) Environmental Stewardship**

TOT dollars (bed tax) – funds these initiatives and supports projects aligned with community agreement. The plan aims to foster a sustainable and vibrant Tahoe Region.

Promotes collaboration between stakeholders to address key challenges and opportunities e.g. workforce housing initiative), housing market example where funds available for someone working in the region as a first home buyer but only deed on the fund payment is that when it's sold to a local working in the region.

Invested in a robot that cleans up rubbish on the beach (B Bot) collects waste under the surface of the sand preventing rubbish getting into the lake.

34 action items in their destination stewardship plan that all stakeholders have agreed on.

From trail design, access to recreation resources, transport, rubbish collection, promotion of Tahoe water (no need for plastic bottles).

Lessons Learned:

- Find and follow your own north star. Turn values into vision, use the community values as your North Star.
- Conflict is going to be part of the journey and collaboration will be part of the solution. It is all part of the process.
- Understand the conflict, pain points, pressure points – collaboration can be a tool to help.
- Regular Situational Assessment – most ideas come from the community.
- Empowering community engagement, working across regional boundaries.
- Chart the future – The plan is worthless if it sits on a shelf, you will never be done learning!

Destination Stewardship – As told by [Visit Lake Tahoe](#)
Visit Lake Tahoe – Stuart Maas, Senior Director of Marketing & Business Development
Visit Durango – John Ragozzino, Marketing & Sales Director

- Visit Lake Tahoe’s north star is to be the leader in sustainable tourism in the world.
- Focus on stewardship only, not calling for visitors. Summer and winter campaign now, focus on shoulder periods. In summer, there is no marketing. In winter they break to three options – early season, peak winter, and tail end of season.
- They take out any images of key iconic places. They do not need marketing for the places people know.
- VLT has won lots of awards for sustainable travel including their re-brand of Visit Lake Tahoe – Awe and then Some, year-round recreation.
- VLT use Zartico data to shift clusters of travel from peak volume areas to the locations needing dispersal.
- They use live Zartico dashboard in board meetings to support and quantify data, enabling them to use data driven decisions, always!
- VLT has a plastic water bottle ban in their community. They purchased 35,000 water bottles to stop landfill of plastic, with 10,000 more on order.

Visit Durango – John Ragozzino, Marketing & Sales Director

- Visit Durango, Colorado moved from being an RTO to a DMO wanting to be leaders in their community for advocacy.
- Their goal of Responsible Tourism is to create a more sustainable and equitable industry, one that provides benefits to local communities and minimizes environmental impacts. This includes ensuring that tourism generates good jobs, supports local businesses, conserves natural resources, and improves social welfare. <https://www.durango.org/responsible/>

6. Related Content/Event Images

