

Alpine Resorts Strategic Plan 2026-2030

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Acknowledgement of Country



We acknowledge and pay our respects to the Gunaikurnai, Taungurung, Wurundjeri Woi-wurrung, Bidwell, Dhudhuroa/Waywurru, and Jaithmathang people as the First People and original custodians of the land, water and skies on which we rely and operate; their unique ability to know, read and care for Country and their spiritual, social and cultural connection to it.

We honour Elders past and present whose knowledge and wisdom have ensured the continuation of culture and traditional practices.

We are committed to genuinely partner, and meaningfully engage, with Traditional Owners and Aboriginal communities to support the healing of Country, the maintenance of spiritual and cultural practices and the achievement of their broader objectives in the 21st century and beyond.

The 2050 Vision

Victoria's alpine resorts are thriving, inclusive and climate resilient, renowned for world class snow experiences and mountain activities.

Introduction

The Alpine Resorts Strategic Plan 2026–2030 (ARSP) provides the long-term strategic objectives for the alpine sector in Victoria and is the key strategic tool guiding the alpine resorts. This Plan will be supported by individual Resort Management Plans which will translate the objectives in this Plan into place-based actions to realise the desired outcomes of resort communities.

The sector will benefit as a whole through the success of its many parts. For the purposes of this plan the alpine sector in Victoria comprises the private sector businesses and investors, resorts stakeholders and communities, the local governments representing the communities in the sub-alpine valleys, state and national sports associations, Alpine Resorts Victoria and other government entities. All either do business, live, work and/or play in and around the alpine resorts of Falls Creek, Lake Mountain, Mt Baw Baw, Mt Buller, Mt Hotham, and Mt Stirling.

These resorts are nestled on the Country of several Registered Aboriginal Parties - the Gunaikurnai, Taungurung, and Wurundjeri Woi Wurrung, and Non-Registered Aboriginal Parties - the Dhudhuroa/Waywurru, Jaithmathang and Bidwell. There are varying levels of awareness and understanding of Traditional Owners as partners to the sector and we acknowledge development of genuine relationships and partnerships with Traditional Owner's is an important part of self-determination.

The alpine sector has collectively developed a series of strategic objectives and actions in this plan that we will focus on over the next 5 years to move us towards our 2050 vision of:

Victoria's alpine resorts are thriving, inclusive and climate resilient, renowned for world class snow experiences and mountain activities.

In addition, our Traditional Owner partners have told us how their objectives for Country and communities can be realised and aligned with the aspiration and priorities of the sector so that we can move towards this vision together.

As a sector, we understand the unique alpine environment is what our industry relies on. We are committed to protecting the remarkable biodiversity and ecological integrity of Victoria's alpine environments. Our shared stewardship includes a duty to conserve threatened species, preserve and restore habitats, and proactively manage the impact of both human activity and natural threats, ensuring these mountain landscapes continue to provide employment for generations to come.

Visitors are core to the alpine sector's purpose. Nearly 1.38 million visitors enjoy the alpine resorts annually with 68.1% of them visiting in winter¹. Our goal is to grow this by at least 10% by 2030 to 1.52 million visitors annually. Each resort plays a unique role in the sector and each offers experiences that play to the resort's strengths. Optimising the visitor experience in each resort to ensure all visitors have the best experience possible is the shared responsibility of all parts of the sector if we are to continue to grow the number of people enjoying these special places and creating life memories. Our goal is to maintain or improve visitor satisfaction across all resorts over the life of this plan.

Central to achieving the vision is enhancing and prioritising the winter economy - winter is the economic powerhouse of the alpine sector generating 81% of the \$2.14 billion economic output annually². Our goal is that by 2030 the economic output has grown by 10% or \$210 million to \$2.35 billion. This makes continuing to adapt to the impacts of climate change and further building our climate resilience as a sector, paramount to the industry's future and a key focus for the next five years.

Given the unique partnership between the private and public sectors that has been the foundation of the Victorian alpine resorts for 100 years, this partnership needs to continue to work together to reform the financial model that is currently in place, with the view of having better access to government funding equitable to tourism events and destinations that make comparable contributions to the State's economic and social fabric. In addition, we will work together to reduce the cost of doing business and facilitate private investment through red tape reduction to help leverage the public and private sector investment on a similar 1:4 ratio that currently exists.

For more than two decades 'green season' aspirations have been far greater than any evidence for market demand. It is unhelpful to equate summer in Victoria's alpine resorts to summer usage in northern hemisphere alpine resorts as the social, cultural and geographic context is vastly different. Identifying what are the real barriers to grow green season visitation in the Victorian context will inform where government's efforts could be directed and help target private sector investment. Whilst the alpine sector broadly supports green season development that support is predicated on it being where the development is market-driven and commercially viable and not at the expense of investing in the snow season and negatively impacting the economic, social and cultural contributions of winter tourism.

¹ Economic Contributions and Benefits of Victoria's Alpine Resorts 2024

² Ibid

There is a breadth of communities across and within resorts, that do business, recreate and/or live, with each of the large resorts swelling to the size of a rural city for winter. During the consultations to develop this plan, many people proposed that year-round communities be established in the large resorts. The establishment of towns of any size is driven by several fundamental factors such as resource availability, diverse economic opportunities, social structures, community services and infrastructure, and education and learning. These factors highlight the complex interplay between human needs, environmental conditions, and social dynamics that contribute to the establishment and growth of communities and towns.

Our sector can influence only some of these factors. Over the next five years we will focus on strengthening partnerships and community outcomes to provide enhanced visitor experiences and deliver wider economic and social benefits and building support for our sector. Aligning long-term planning for each resort with local government areas and regional development partners is critical to improving the servicing of resorts, supporting resort operations, attracting visitors and supporting resort communities.

We understand that to achieve our vision we need to strengthen partnerships and amplify the alpine sector voice and create deeper understanding amongst decision makers and communicate the benefits and value of the resorts to all Victorians, not only those that visit and enjoy these special places. This will help to improve advocacy for the sector and sustain the unique private public partnership that is the foundation of the alpine industry in Victoria.

The Plan at a Glance

VISION: *Victoria's alpine resorts are thriving, inclusive and climate resilient, renowned for world class snow experiences and mountain activities*

OBJECTIVE 1 The alpine sector grows the economic, and social benefits to Victoria, and optimise the winter visitor experience	OBJECTIVE 2 The alpine sector continues to build its resilience and adaptation to climate change	OBJECTIVE 3 Reduce the cost of doing business in the alpine resorts	OBJECTIVE 4 Strengthen community partnerships and amplify the sector's voice	OBJECTIVE 5 Traditional Owner rights and obligations are embedded into planning and management of alpine resorts	OBJECTIVE 6 Identify investment barriers and seek investment to grow visitation in the green season
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ACTIONS

ACTION 1 Undertake research to better understand existing, growth and new markets and barriers to participation	ACTION 1 Implement strategic environmental management plans and sub-plans	ACTION 1 Identify the primary regulatory and administrative barriers that hinder business and investment	ACTION 1 Refresh, resource and formalise the Alpine Resorts Industry Advisory Group (ARIAG)	ACTION 1 Develop employment pathways for Traditional Owners to work on alpine Country	ACTION 1 Conduct a market demand analysis on current and forecast visitor demand
ACTION 2 Work with Government to include alpine resorts in its public transport policies	ACTION 2 Ensure emergency management planning is climate ready	ACTION 2 Reform the Alpine Resorts Planning scheme.	ACTION 2 Formalise the working partnership between ARV and ARIAG	ACTION 2 Conduct annual strategic planning days with RAPs	ACTION 2 Identify barriers and enablers to green season growth,
ACTION 3 Develop a confidential data sharing framework for sharing of relevant visitor data	ACTION 3 Create a Strategic Communications Alliance	ACTION 3 Streamline permit and licensing processes for clear, efficient approval pathways	ACTION 3 Create and implement a unified alpine sector advocacy agenda	ACTION 3 Where desired by RAPs, develop and execute formal partnership agreements	ACTION 3 Use insights from the market demand analysis to scope product development opportunities
ACTION 4 Develop Integrated Resort Management Plans for each of the resorts	ACTION 4 Diversify water supplies and explore less climate dependent sources of water	ACTION 4 Advocate for ARV to be recognised as equivalent to a local government authority	ACTION 4 Commission in 2029 the Economic Impact Study	ACTION 4 Undertake Strategic Aboriginal Heritage Assessments and/or cultural mapping	
ACTION 5 Identify and develop a program of long-term investment opportunities	ACTION 5 Ensure infrastructure investments consider climate risks and projected climate conditions	ACTION 5 Seek equitable access to recurrent government funding streams		ACTION 5 Identify and establish cultural gathering spaces at each alpine resort, and integrate Aboriginal storytelling	
ACTION 6 Pursue partnerships between public and private entities	ACTION 6 Collaboratively develop resort specific Snow Area Management Plans for the 3 large resorts	ACTION 6 Promote workforce development, affordable housing, and social inclusion		ACTION 6 Support development and promotion of alpine Traditional Owner-led tourism experiences	
ACTION 7 Develop and promote an investment prospectus for development of greenfield sites		ACTION 7 Investigate the development of one alpine award to cover all mountain operators			
ACTION 8 Leverage capacity studies to manage visitor densities		ACTION 8 Develop new or updated masterplans for Falls Creek, Mt Buller, Mt Hotham			
ACTION 9 Develop in-resort continuous visitor feedback and improvement mechanisms					
2030 SECTOR OUTCOMES					
Annual Economic Output				\$2.35 billion annually	
Visitors				1.52 million annually	
Gross Value Added				\$1.14 billion annually	
Visitor Expenditure				\$1.46 billion annually	
Jobs Supported				13,530 FTE	
Winter Visitor Satisfaction Trend				Increasing	
Environmental Benefits				Increasing	
Traditional Owner Partnership Agreements				Two	

The Value of Victoria's Alpine Resorts

Victoria features six alpine resorts act as unique tourism drivers for the State, including Falls Creek, Lake Mountain, Mt Buller, Mt Baw Baw, Mt Hotham, and Mt Stirling. The resorts are public land set aside specifically for the purpose of development and use whilst protecting their fragile environments - different to the many other types of public land, in that core to their purpose is development and use.

The three larger resorts – Falls Creek, Mt Buller and Mt Hotham – attract the largest number of visitors, offer the full range of snow experiences in winter due to their higher elevations, have the greatest amount of private sector investment and sit at the highest elevations. The three smaller resorts – Lake Mountain, Mt Baw Baw, and Mt Stirling – attract smaller numbers of visitors, offer largely snow play and beginner skiing and boarder, cross-country and back-country skiing and more niche experiences, they have little or no private sector development, and sit at lower elevations and Mt Stirling, under current legislation, must be preserved as a nature-based tourism destination without development.

Victoria's alpine resorts are significant contributors to the Victorian economy, generating \$2.14 billion in total economic output on an annual basis.³ This means they account for 8% of all tourism in the State and sustain an economic output that is 1.5 times higher than major flagship events like the Australian Grand Prix, Australian Open and Spring Racing Carnival combined.

The alpine resorts attract nearly 1.4 million visitors year-round – more than the collective visitation of iconic attractions like Puffing Billy, Sovereign Hill and the Phillip Island Penguin Parade. They sustain over 12,000 jobs in regional Victoria, where there are often lower levels of employment and reduced job opportunities compared to metropolitan centres.

Importantly, these economic benefits stretch beyond the boundaries of the resorts, and across the regions in which they are located. This is particularly true in the High Country, where the alpine resorts account for 25% of all visitation to the tourism region. As a result, the resorts form the economic backbone of regional communities as evidenced by the economic contribution that they make to valley destinations, including \$165 million in economic output annually in Alpine Shire at the base of Mt Hotham and Falls Creek, and \$112 million in Mansfield Shire at the base of Mt Buller and Mt Stirling.

When considering the economic environment of the resorts, it is also important to acknowledge the crucial role that the private sector plays in the success of these tourism destinations, as reflected in the value of the asset base of the resorts. While Alpine Resorts Victoria (ARV) manages \$519 million of State Government assets, the private sector has \$2 billion worth of assets. This means that every public dollar invested in assets is matched by \$4 from the private sector.

³ Economic Contributions and Benefits of Victoria's Alpine Resorts 2024

It is the natural characteristics of the alpine environment that connect Victoria's six resorts. One of Australia's most unique habitats, the alpine environment is characterised by high-altitude peaks and plateaus, supporting unique ecosystems like heathlands, grasslands, and freshwater bogs, that are home to specialised plants and animals such as the Mountain Pygmy-possum and the Bogong moth. Natural features include landscapes formed over millennia by its elevation, harsh climate with persistent snow, cold temperatures, high rainfall, and strong wind chill. These environments are also places for the headwaters of major rivers such as the Murray, King, Kiewa and Delatite.

These alpine areas have for millennia been of deep cultural significance for First Nations peoples as part of their ancestral Country. These highlands are connected to creation stories, seasonal practices and spiritual beliefs that have guided the Traditional Owners life for thousands of years. The mountains provided resources such as food, water and materials, and served as important meeting places for trade and ceremony. Today, they remain central to cultural identity, representing a living connection to ancestors and the responsibility to care for Country.

As alpine landscapes were opened up and utilised in the post-contact era, this contributed to the displacement of Traditional Owners. Continued growth and success relies on meaningful engagement and genuine partnerships with Traditional Owners, as an essential and growing focus for the long-term sustainability of these places and the sectors that depend on them.

Following European settlement, the alpine regions were initially used for access to the goldfields, mining, grazing and timber harvesting before their unique natural qualities were recognised as recreation and tourism destinations. Over more than a century, Victoria's alpine resorts have evolved from early, informal visitor sites into established destinations shaped by explorers, snow enthusiasts and community pioneers. Their efforts laid the groundwork for what has become a significant economic and social contributor to Victoria, and this legacy now underpins the sector's next phase of strategic development, resilience and long-term sustainability.

Over the decades, the resorts have evolved to meet the changing needs and preferences of their visitors. Early developments focused on providing basic shelter and access to the slopes, but as the popularity of alpine recreation grew, so too did the infrastructure and amenities offer. Today, Victoria's alpine resorts are renowned for their world-class facilities, diverse recreational opportunities, and commitment to sustainability and visitor service built on a unique partnership between the private and public sectors.

The Alpine Resorts Sector

The alpine resorts sector in Victoria is made up of a robust network of private sector business partners and investors, community stakeholders and government entities, each playing a crucial role in its past, present and future development and sustainability.

Private businesses

Private businesses underpin the operating model of the larger resorts and provide commercially sustainable and viable tourism products that complete the recreation options available to visitors. Supporting the private sector to thrive, and create vibrant resorts and villages, is critical to the economic sustainability of the sector.

The private sector currently has over \$2 billion invested in infrastructure in the alpine resorts, primarily at Falls Creek, Mt Buller and Mt Hotham⁴.

There are numerous private business operators, large and small, across the resorts. Many of the day-to-day services that underpin the visitor experience, including food and drink, accommodation, ski lifts, lessons, rental, retail and tourism activities, are provided by private businesses. The exception to this is Mt Baw Baw and Lake Mountain, where Alpine Resorts Victoria currently delivers many of these services.

Continual investment in utilities and essential services infrastructure is crucial to attracting private sector investment and ensuring the resorts can provide an appropriate and appealing location to invest, in comparison to other tourism destinations.

The private sector is critical in making the alpine resorts what they are today, and it is crucial that alpine resort businesses are financially sustainable and that barriers to further investment are minimised so that the resorts can continue to thrive into the future.

Government

As the resorts are on public land, ARV manages the alpine resorts in accordance with the *Alpine Resorts (Management) Act 1997* (the Act)⁵ which details objectives and functions that determine the management of each resort. These objectives include promoting the sustainable use and development of the resorts, ensuring that a broad range of people can use these areas for outdoor recreation and tourism in all seasons, and fostering the involvement of the community and Traditional Owners in their management.

⁴ Economic Contributions and Benefits of Victoria's Alpine Resorts 2024

⁵ Alpine Resorts (Management) Act 1997

The Act also emphasises the importance of preserving and protecting the natural environment, cultural heritage, and biodiversity of the alpine regions. It recognises the need to balance recreational, tourism, and commercial activities with environmental conservation and cultural preservation and that balance will differ in each resort.

The Act also sets out the governance arrangements of the organisation including the functions and responsibilities of the ARV Board.

ARV works closely with the Minister for Environment and the Minister for Tourism, Sport and Major Events to align its strategies and operations with broader government policies and goals, together with the needs and aspirations of the resorts private sector operators. This partnership ensures that the management of alpine resorts is conducted in a manner that results in environmental, tourism and recreational outcomes for Victorian's and visitors to our State.

The Department of Energy, Environment and Climate Action (DEECA) collaborate with ARV to support the governance, oversight and regulatory compliance. This relationship is crucial for fostering sustainable tourism, maintaining the ecological balance within the alpine resorts, and addressing climate change impacts.

Together, ARV, the Minister for Environment, and DEECA in partnership with the private businesses, community and other parts of government, contribute to the resilience and vitality of the alpine sector, ensuring that these unique landscapes are preserved for future generations while supporting the needs of visitors and local communities.

Community and Regional Involvement

The local governments of the Alpine, Baw Baw, Mansfield, and Murrindindi shires and many regional organisations play a vital role in the delivery and promotion of alpine experiences. These entities work in close collaboration with ARV and alpine business operators, ensuring that the unique needs of both visitors and local communities are met. They are instrumental in developing sustainable tourism initiatives, enhancing infrastructure, and fostering economic growth within the alpine regions.

Recreation and tourism bodies, including visitor economy partnerships and industry associations, are equally essential in supporting the alpine sector. They are actively involved in marketing the regions, attracting visitors, and providing infrastructure, services and programs to enhance the visitor experience. These organisations also offer valuable insights and feedback, helping to shape policies and strategies that align with the broader goals of the alpine sector and the regions. Their efforts contribute significantly to the vibrancy and resilience of Victoria's alpine resorts, making them desired destinations for outdoor enthusiasts.

Visitors

The alpine resorts attract an average of 1.38 million visitors annually who generate \$1.33 billion in direct expenditure. The alpine visitors play a crucial role in supporting the local economies and fostering sustainable tourism within the alpine regions.

The snow season attracts the highest level of visitation, with the four-month winter period accounting for 80% of expenditure.¹ Whilst the green season is important it is the uniqueness of snow that is the main motivation for people to visit alpine resorts. The presence of snow, either via natural snowfall or manufactured, is the greatest driver of the number of visitors to the resorts.

Victoria's alpine resorts attract a diverse range of guests, predominantly from within the state. During winter, the resorts are frequented by snow sports enthusiasts and increasingly visitors interested in tobogganing and snow play.

These visitors typically include families, groups of friends, and winter sports enthusiasts. In the larger resorts (Falls Creek, Mt Buller and Mt Hotham) more than 50% of guests visit a ski resort every year, whereas at Lake Mountain and Mt Baw Baw visitors are predominantly snow players and are less likely to repeat visit. However, seventy-nine percent of visitors to these smaller resorts go on to visit the larger resorts and 23% of Victorian alpine resort visitors are first introduced to snow at these smaller resorts.

Outside the snow season, the alpine resorts attract visitors participating in nature-based tourism and recreation activities, which are experiences also offered elsewhere across the broader public land estate. These visitors include bushwalkers and hikers, mountain bikers, sightseers, nature lovers, horse riders and adventure seekers. This visitation is driven by the opportunity to engage with unique alpine landscapes. Summer visitors characteristically stay for less time than winter visitors and spend less.

Who We Welcome: Visitor Snapshot

Victorian Residents

84% of winter and 90% of green season visitors are from Victoria. The remainder are mostly from NSW and SA; less than 1% are international.

Distance Travelled

71% of Victorian winter visitors travel more than 200km to visit; only 44% do so in green season, reflecting more localised summer activity.

Trip Patterns

The average alpine visitor comes 3.9 times per year. About 28% are day-trippers in winter (rising to 42% in green season). Winter party sizes average 4.1; green season, 3.0.

Expenditure Focus

In winter, 71% of spending occurs within the resorts; in green season, this drops to 38%, with more spent in towns nearby or elsewhere in Victoria.

Traditional Owner Partners

The Gunaikurnai, Taungurung, Wurundjeri Woi-wurrung, Bidwell, Dhudhuroa/Waywurru, and Jaithmathang peoples are the First People and original owners of much of the alpine Country. These groups have had deep spiritual, cultural, and historical connections to the land for millennia.

The Registered Aboriginal Parties relevant to the alpine resorts include the Taungurung Land and Waters Council, the Gunaikurnai Land and Waters Aboriginal Corporation, and the Wurundjeri Woi Wurrung Cultural Heritage Aboriginal Corporation.

Other Traditional Owners with a connection to Country encompass a broader network of Aboriginal communities who share stewardship responsibilities and cultural ties to these landscapes. Collectively their wisdom and traditional knowledge are vital in maintaining the cultural heritage and ecological balance of the alpine regions.

The Victorian alpine sector is committed to fostering partnerships with Aboriginal communities in line with the objectives of their respective Country Plans and the Government's commitment to self-determination.

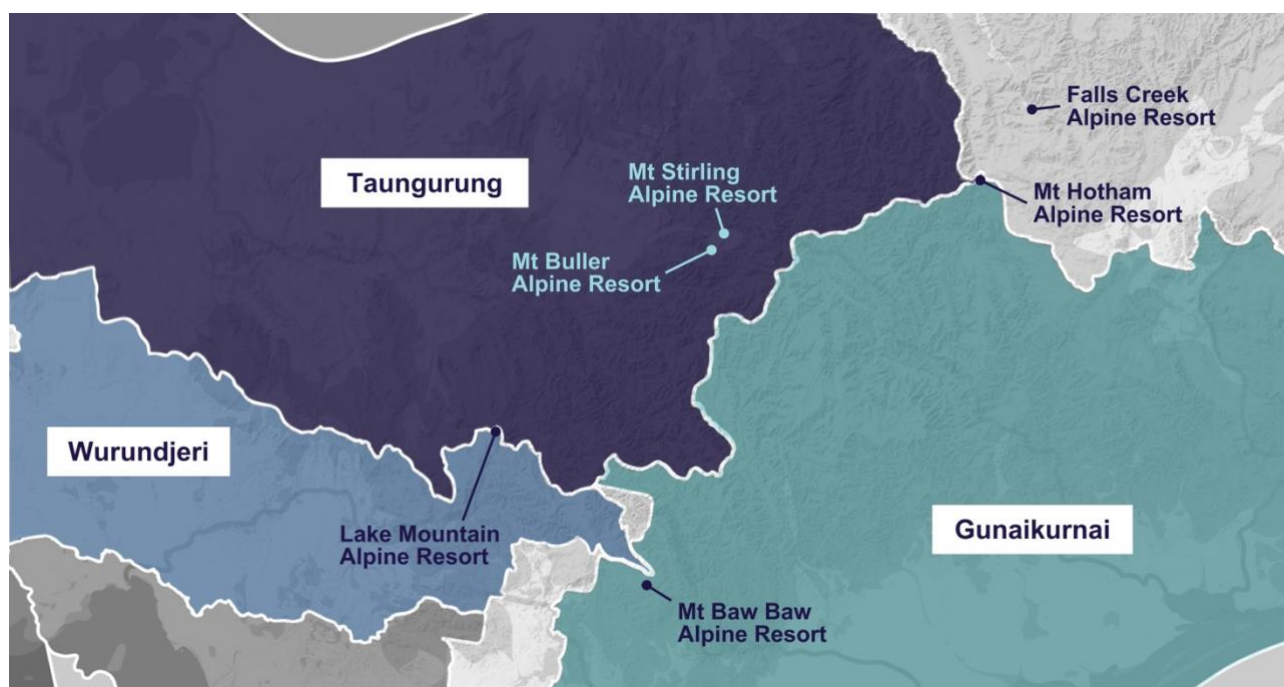


Figure 2: Registered Aboriginal Party boundaries and alpine resorts

Environmental Significance of Victoria's Alpine Resorts

Victoria's alpine resorts stand as both economic and social pillars, yet their true value is inseparable from their remarkable environmental significance. Nestled within rare mountain ecosystems that represent less than 0.3% of the state's landmass, these resorts are custodians of habitats where around 30% of Victoria's threatened alpine flora and 20% of the state's threatened alpine fauna species are found. Critically, these areas provide sanctuary for the Mountain Pygmy-possum – one of only three remaining populations in Australia - and support other vulnerable species such as the Broad-toothed Rat and the Alpine She-oak Skink.

Environmental stewardship goes hand in hand with economic resilience. By upholding rigorous conservation standards and investing in the preservation of native vegetation and fragile habitats, the alpine sector safeguards the rich biodiversity and ecosystem services that underpin local prosperity. Clean water flows, healthy soils, and pristine air - secured through effective environmental management - not only benefit wildlife and plant communities but also form the foundation for tourism, recreation, and ongoing economic activity.

In practical terms, environmental initiatives such as threatened species recovery programs and habitat restoration projects have been proven to enhance the attractiveness of alpine destinations, drawing both nature-focused visitors and the broader public. A reputation for sustainability boosts visitor confidence and creates new market opportunities, strengthening the enduring economic base of regional communities.

Ultimately, the ongoing protection of Victoria's alpine environment ensures that these unique landscapes and their biodiversity continue to generate direct and indirect economic benefits. By recognising the intrinsic connection between ecological integrity and economic vitality, alpine resorts are well positioned to thrive sustainably - preserving natural values and supporting resilient regional economies.

The Alpine Resorts Sector in 2025

Economic and social significance of Victoria's alpine sector

Victoria's alpine resorts are more than destinations - they are engines of economic growth, vibrant hubs of regional employment, and key contributors to the health, social fabric, and environmental legacy of the state. Our sector delivers outstanding value for money, ensuring that investment in the mountains returns multiple dividends for all Victorians.

The latest independent analysis commissioned by ARV confirms that alpine resorts are not just winter playgrounds, but year-round contributors to the prosperity and wellbeing of Victoria.

Economic Contributions and Benefits of Victoria's Alpine Resorts 2024⁶



⁶ Economic Contributions and Benefits of Victoria's Alpine Resorts 2024

Annual Value: The Headline Numbers

- **Visitation:** 1.38 million visitor entries—935,800 in winter, 440,300 in the green season.
- **Economic Output:** \$2.14 billion generated annually (including \$1.33B direct, \$807M indirect).
- **Gross Value Added (GVA):** \$1.04 billion per annum (\$672M direct, \$370M indirect).
- **Employment:** 12,130 full-time equivalent (FTE) jobs supported each year, with over 8,300 directly linked to visitor activity.
- **Visitor Expenditure:** \$1.33 billion annually (\$1.06B in winter, \$270M in green season); winter visitors spend 83% more on average than summer visitors.
- **Wages and Business Surplus:** \$133 million in business profits (\$121M) and additional wages (\$12M) that would not be realised elsewhere.
- **Investment Leverage:** For every \$1 of government asset investment, \$4 is invested by the private sector. Government assets total ~\$500M; private assets (including lifts) stand at ~\$2B.

Economic Significance: Direct and Indirect Impact

The sector's contribution extends beyond the resort boundaries. Of the total \$2.14 billion annual economic output, 65% of direct output is on-mountain, while 20% benefits nearby local government areas (LGAs) and 15% is felt in the rest of Victoria. For indirect contributions, 77% accrue across the broader Victorian economy, illustrating the far-reaching value chain - from local cafés to statewide suppliers.

By the Numbers: Distribution by Resort

- Mt Buller, Mt Hotham, and Falls Creek together account for 78% of winter and 70% of green season visitation, and the lion's share of GVA and employment.
- Average spend per winter visitor: \$1,137; Falls Creek tops the chart at \$1,792 per trip, while Lake Mountain reflects more day activity at \$266.
- Accommodation, lift passes, and hospitality are key drivers of business profits, with lift passes yielding the highest margins.

Social & Health Benefits: More than Economics

The alpine sector's social dividend is substantial:

- **Health and User Benefits:** \$154 million in annual user and health benefits—including \$17M in user enjoyment beyond fees and \$137M in improved visitor mental and physical health.
- **Existence Benefits:** \$820 million each year—reflecting the value Victorians place in knowing our resorts exist, regardless of visitation

Economic Contribution of Victoria's alpine resorts to the Victorian economy

Economic contributions to Victoria as a whole

●	Total output	\$2,141m
+	Total GVA	\$1,042m
👤	Total FTE jobs	12,129

Economic contributions to rest of Victoria

(excluding contributions on mountain and in nearby LGAs)

●	Total output	\$823m
+	Total GVA	\$373m
👤	Total FTE jobs	4,065

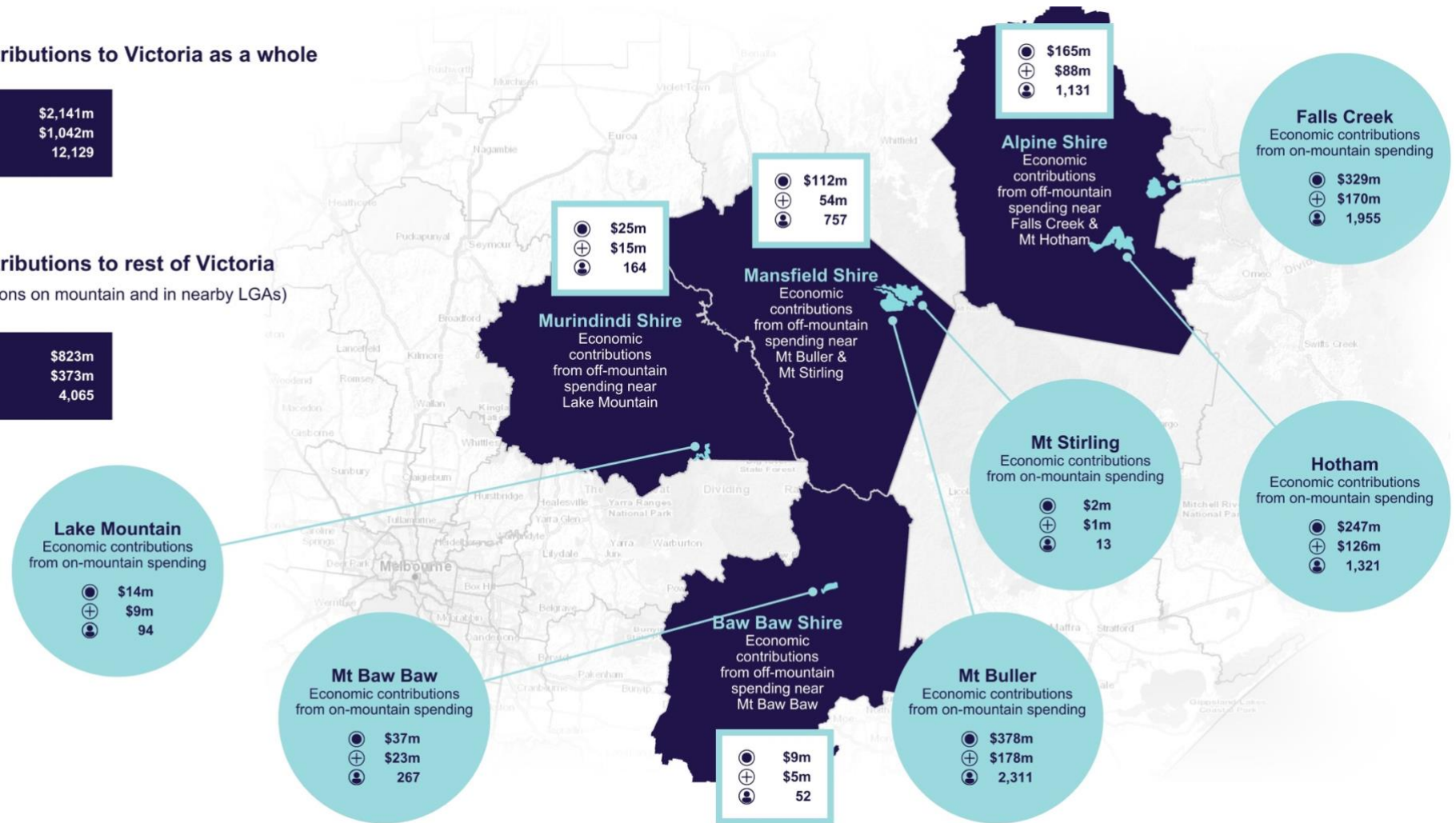


Figure 4. Economic contributions by alpine resort

Expected Operating Environment for 2026–2030

Climate Change

As a sector, we recognise the impact climate change will continue to have on the Victorian alpine resorts. For over two decades we have experienced climate variability and shifts in seasonal weather patterns, including rising temperatures and decreasing natural snow covers, that the sector has adjusted to and will continue to respond and adapt to. Looking ahead to 2050 and during 2026-2030, we will need to increasingly adapt to dynamic winter seasons and growing climatic variability. Our commitment is to lead with proactive adaptation - through innovative snowmaking, sustainable water and energy management, resilient infrastructure, and product development and diversification – as we have always done, while also confronting the threats of bushfire, unpredictable rainfall, and challenges to biodiversity.

Visitor Economy

Our sector continues to be an essential driver of the regional visitor economy, delivering tourism, recreation, and vibrant events that currently represent 6% of total tourism in the State⁷. From 2026 to 2030, we will focus on strengthening the winter economy, aligning the alpine experience to the needs and desires of a broad range of visitors. By embracing changing demographics, new travel patterns, and greater competition, Victoria's alpine resorts will remain welcoming, accessible, and considered natural assets for Victorians.

Population and Visitor Growth

The alpine resorts in Victoria are predominantly visited by Victorians. Victoria is forecast to experience population growth of approximately 1.75% annually over 2026 to 2030, potentially reaching between 7 and 8 million by 2027 and just over 10 million by 2051.

Historically the number of visitors to alpine resorts has closely aligned with population growth. With some seasonal variations it is not unreasonable to expect visitation levels to continue to align with population growth. Over the past decade visitation numbers to alpine resorts represent approximately 30% of Victoria's population.

⁷ Economic Contribution of Tourism to Victoria 2023-24, Results from the State Tourism Satellite Account from Tourism Research Australia, 2025, Department of Jobs, Skills, Industry and Regions, Victorian Government.

Table 1. Victoria Population vs Alpine Resort Visitation (2015–2025)

YEAR	VICTORIA POPULATION (millions)	ALPINE RESORT VISITATION – Winter (thousands)	ALPINE RESORT VISITATION – Summer (thousands)	% OF POPULATION VISITING RESORTS
2015	5.94	1,394	393	30.08
2016	6.17	1,376	450	29.59
2017	6.30	1,605	435	32.38
2018	6.42	1,722	435	33.60
2019	6.54	1,674	454	32.54
2020 (COVID impact)	6.62	204	268	7.13
2021 (COVID recovery)	6.55	799	481	19.54
2022	6.62	1,897 (record high)	450 (estimate)	35.45
2023	6.81	1,541	445 (estimate)	29.16
2024	6.95	1,314	369	24.21
2025	7.16 (estimate)	1,608	-	-

Macro Economics

We acknowledge that the economic landscape - both nationally and globally - will continue to shape our sector's future. Fluctuations in disposable income, the health of the Australian economy, and shifting tourism trends directly affect our operations and investment opportunities. In the years ahead, we will navigate inflationary pressures, the changing cost of living, and evolving workforce dynamics.

Our strategy is to invest in resilient infrastructure, build strong partnerships, and develop our workforce. By doing so, we will ensure the economic strength and adaptability of our alpine communities.

Energy Transition

All industries are experiencing the global shift away from fossil fuel energy sources to more renewable alternatives that generate significantly lower or no emissions and the alpine sector cannot ignore this. This transition to a low-carbon economy is well underway in Australia and is being accompanied by other trends that enhance environmental sustainability, such as pursuing nature repair and a circular economy.

A rapid and orderly low emissions transition presents a major opportunity for our sector. It could deliver cheaper, greener and plentiful electricity, which would:

- Reduce operating costs
- Increase the sector's capacity to cost-effectively undertake additional snowmaking, pending reliable and sustainable water supplies
- Drastically reduce the carbon footprint of resort operations, which is increasingly important to visitors and operators.

ARV is leading the way, pursuing low energy emissions through investment in solar and micro hydro power facilities across several resorts. However, most of our resorts will always rely on some grid-supplied electricity. Sustainability will remain at the core of the sector's response as we strive to reduce our environmental footprint as a sector and safeguard our mountain environments for generations to come.

Traditional Owner Self-Determination and Treaty

Our sector is committed to advancing the self-determination of Traditional Owners as a core part of our operating environment for 2026–2030. We will continue to foster meaningful partnerships that guide how we manage land, protect cultural heritage, and shape tourism development. We believe that embedding Aboriginal knowledge, values, and objectives into decision-making processes enriches our sector and the broader community.

Treaty is a pathway to acknowledging the past and making real, practical change to achieve better outcomes for First Peoples in Victoria and alpine resorts will adapt to the changes Treaty and other legislative changes may bring.

Over the next five years we are likely to see Treaty negotiations progress including the proposed introduction of the Statewide Treaty Bill to Victorian Parliament⁸. The recommendations from the First Principles Review of the *Traditional Owner Settlement Act 2010*⁹ including those specific to alpine resorts, are also likely to be implemented.

Through collaboration and respect, we can play an active role in reconciliation, empower economic participation, and honouring the unique cultural identity of the Victorian alps for current and future generations.

Initiatives aimed at increasing connection to Country, timely and respectful involvement of Traditional Owners in decision making about activities on Country, reference back to Country plans where they exist, with an emphasis on respecting and integrating traditional knowledge, cultural practices and rights, will help progress Aboriginal self-determination and will ensure that these communities have a meaningful voice and active role in the sustainable future of Victoria's alpine resorts.

⁸ Statewide Treaty Bill to Victorian Parliament

⁹ First Principles Review of the Traditional Owner Settlement Act 2010

Alpine Sector Strategic Objectives and Activities: 2026-2030

This plan sets out how the sector and sector partners will achieve our vision of

Victoria’s alpine resorts are thriving, inclusive and climate resilient, renowned for world class snow experiences and mountain activities

and continue to maintain and grow the significant economic, social and environmental contributions alpine resorts make to the State. It describes how we will tackle the challenges of climate change impacts and adaptation, changing demographics of our visitors and the economic cycles, so that we can continue to welcome visitors to have memorable experiences now and well into the future.

The outcomes of implementing this plan will be best measured through comparing the economic contribution the sector makes over time, using the metrics in Table 2 below.

Table 2. Sector Outcomes Metrics

METRIC	2024	2030 TARGET
Annual Economic Output	\$2.14 billion annually	\$2.35 billion annually
Visitors	1.38 million annually	1.52 million annually
Gross Value Added	\$1.04 billion annually	\$1.14 billion annually
Visitor Expenditure	\$1.33 billion annually	\$1.46 billion annually
Jobs Supported	12,300 FTE	13,530 FTE
Winter Visitor Satisfaction trend*	n/a	Increase
Environmental Benefits**	Not quantified	Quantified
Traditional Owner Partnership Agreements Developed & Being Implemented***	Nil	2

* The assessment tools to be used to analyse winter visitor satisfaction from 2026 will be agreed and the trend measured over the life of the Plan.

** Establish quantifiable baseline before 2028 then assess over the remaining life of the Plan.

*** GLaWAC and TLaWC have both identified Partnership Agreements with ARV as a priority.

Objective 1: Enhance and Prioritise the Winter Tourism Economy

Activities under Objective 1 progress the following outcomes:

- ✓ *Annual economic output increase*
- ✓ *Gross value-added increase*
- ✓ *Jobs supported improvement*
- ✓ *Annual visitation growth*
- ✓ *Annual visitor expenditure growth*
- ✓ *Winter visitor satisfaction increase*

Purpose:

The winter season is the cornerstone of the alpine sector: it drives visitation, revenue, employment, and investment, underpinning both local communities and the broader regional economy. By taking collective action - driven by collaboration, investment, and innovation - we will secure a future where winter continues to, inspire visitors, fuel our communities and sustain our unique alpine heritage for generations to come.

Optimising the visitor experience is both a foundation and a catalyst for that long-term success. By placing guests at the centre, leveraging robust data and sector insights, and empowering local innovation, the sector will create memorable, inclusive, and resilient alpine experiences and secure its economic and social future.

Integrated Resort Management Plans will describe local actions that align with achieving the sector objectives and resort-level Key Performance Indicators (KPIs) co-designed with resort Stakeholder Consultative Committees (SCCs) to ensure they are meaningful, realistic and supported by those who are responsible for delivery – the public and private partners in each resort.

Table 3: Activities to Enhance and Prioritise the Winter Tourism Economy

ACTIVITY		LEAD*	WHEN
To ensure the alpine sector grows the economic, and social benefits to Victoria, and optimise the winter visitor experience, at the sector level we will:			
1.1	Undertake research current and emerging markets, understand barriers to participation, and attract private investment to diversify the experiences offered at each resort.	Lead: ARV Collaborate: DGipp, Lift Co's, TNE, VV	2027 – 2028
1.2	Work with Government to include alpine resorts in its public transport policies	Lead: ARIAG Collaborate: ARV, DTP, RDV	2026 - 2027
1.3	Create a secure data-sharing framework, including the protocols and systems needed for ARV and resort businesses to confidentially share relevant visitor information within each resort.	Lead: ARV Collaborate: Lift Co's, Chambers, SCCs	TBA
To ensure the alpine sector grows the economic, and social benefits to Victoria, and optimise the winter visitor experience, at the resort level we will:			
1.4	Develop Integrated Resort Management Plans, including tailored Visitor Experience Plans informed by emerging visitor needs, accessibility requirements and opportunities for innovation.	Lead: ARV Collaborate: Chambers, DGipp, DWA, LGAs, Lift Co's, SCCs, TNE, VV	2026 - 2027
1.5	Identify and develop long-term investment opportunities that deliver critical infrastructure and create a pipeline of shovel-ready winter priorities, including sustainable water and energy systems for snowmaking, and improved transport, shelters, toilets and parking.	Lead: ARV Collaborate: CMAs, DEECA, DTP, Energy Providers, LGAs, Lift Co's, RDV, SCCs, Water Authorities	Ongoing
1.6	Pursue public-private partnerships where government investment focuses on enabling infrastructure (such as sustainable water and energy systems) to support additional private investment in snowmaking and diverse accommodation offerings.	Lead: ARV Collaborate: CMAs, DEECA, DTP, Energy Providers, LGAs, Lift Co's, RDV, SCCs, Water Authorities	Ongoing

1.7	Develop and promote an investment prospectus for greenfield development opportunities in the three large resorts.	Lead: ARV Collaborate: DEECA, DTP, Lift Co's, RDV, SCCs	2026
1.8	Use resort capacity studies and work with operators to manage visitor densities so each resort can optimise visitation and deliver the best possible experience for its target markets.	Lead: ARV Collaborate: Chambers, DTP, LGA's, Lift Co's, RAs, SCCs	Ongoing
1.9	Create in-resort feedback and improvement systems that allow ARV and business operators to share real-time visitor insights and make more responsive service adjustments.	Lead: ARV Collaborate: ARIAG, Chambers, SCCs	TBA

* The full names are included in the Abbreviations list (Appendix C)

Objective 2: Protect the Environment and Build Our Climate Resilience

Activities under Objective 2 progress the following outcomes:

- ✓ *Environmental protection and benefits sustained and quantified*
- ✓ *Annual economic output increase*
- ✓ *Gross value-added increase*
- ✓ *Jobs supported improvement*

Many of these activities are also reflected in the ARV Climate Change Adaptation Strategy

Purpose:

As a sector, we understand that our future depends upon maintain a healthy alpine environment and robust, coordinated, and forward-thinking climate resilience. Our sector will proactively maintain environmental values and strengthen the climate resilience of Victoria's alpine resorts—safeguarding our core environmental, economic, and community values. These activities will be undertaken in close partnership with Traditional Owners, local communities, researchers, neighbours, other land managers, and industry stakeholders.

We will anticipate, adapt, and thrive in the face of climate change by embedding climate science in decision-making, investing in resilient infrastructure, and fostering sector-wide collaboration. Together, we will continue to secure the long-term viability of alpine experiences for all, while protecting the irreplaceable natural environment that defines our shared identity.

Table 4: Activities to Protect the Environment and Build Our Climate Resilience

ACTIVITY		LEAD*	WHEN
To ensure the alpine sector continues to protect the environment and build its resilience and adaptation to climate change, at the sector level we will:			
2.1	Implement environmental management plans and sub-plans, using monitoring data to guide priorities and actions.	Lead: ARV Collaborate: CMAs, DEECA, RAPs, TOGs, NGOs, PV	Ongoing
2.2	Ensure emergency management planning is climate-ready by incorporating current climate conditions, near-term projections, historical data and lived experience.	Lead: ARV Collaborate: EM Partners, LGAs, Lift Co's, SCCs, RAPs	Ongoing
2.3	Establish a strategic communications alliance to promote climate resilience and counter negative media narratives about the sector's future.	Lead: ARV, Lift Co's, Snow Aus Collaborate: SCCs, VV	2026
2.4	Diversify water supplies and explore less climate dependent sources to support growing demand as existing supplies become less reliable.	Lead: ARV Collaborate: CMAs, Water Authorities, DEECA,	Ongoing
To ensure the alpine sector continues to build its resilience and adaptation to climate change, at the resort level we will:			
2.5	Ensure all future infrastructure investments and renewals explicitly account for projected climate conditions — including increased bushfire and storm risk, snow variability and water availability — across each asset's full lifecycle.	Lead: ARV Collaborate: DTP, Developers	Ongoing
2.6	Collaboratively develop resort-specific Snow Area Management Plans for the three large resorts, documenting and refining snow management practices, techniques and technologies to maximise snow season viability.	Lead: Lift Co's Collaborate: ARV, SCCs, RAPs	2026-2027

* The full names are included in the Abbreviations list (Appendix C)

Objective 3: Reduce the Cost of Doing Business

Activities under Objective 3 progress the following outcomes:

- ✓ *Annual economic output increase*
- ✓ *Gross value-added increase*
- ✓ *Jobs supported improvement*

Purpose:

Reducing the cost of doing business and the regulatory burden in Victoria's alpine resorts by streamlining administrative systems, modernising governance structures, and removing outdated barriers to investment will help facilitate new investment, support local enterprise, and ensure Victorian alpine destinations remain competitive and sustainable for the long term.

Table 5: Activities

ACTIVITY		LEAD*	WHEN
To help reduce the cost of doing business in the alpine resorts, at the sector level we will:			
3.1	Identify key regulatory and administrative barriers to business and investment in alpine resorts and work with Better Regulation Victoria and relevant agencies to implement improvements.	Lead: ARV/ARIAG Collaborate: Better Regulation Victoria	2026-2027
3.2	Reform the Alpine Resorts Planning Scheme to streamline and codify approvals, reduce time and cost for applicants, and remove unnecessary red tape, including expanding works that do not require a planning permit.	Lead: DTP Collaborate: ARV, DEECA, SCCs	TBA

3.3	Streamline permit and licensing processes for clear, efficient approval pathways	Lead: ARV Collaborate: DEECA	2026
3.4	Advocate for ARV to be recognised as equivalent to a local government authority for access to funding that supports essential service delivery.	Lead: ARV & ARIAG Collaborate: Chambers, DEECA, RAs, SCCs	Ongoing
3.5	Seek equitable access to recurrent government funding streams so alpine resorts are treated on par with other major tourism destinations for infrastructure and asset management.	Lead: ARV & ARIAG Collaborate: DEECA	2027 ongoing
3.6	Develop programs that strengthen workforce development, expand affordable housing options and enhance social inclusion across alpine resort communities.	Lead: ARIAG Collaborate: ARV, Chambers, DWA, RDV, SCCs	TBA
3.7	Investigate the feasibility of a single alpine award covering all mountain operators, including an assessment of risks, opportunities and implementation requirements.	Lead: ARIAG Collaborate: Chambers	2027

To help reduce the cost of doing business in the alpine resorts, at the resort level we will:

3.8	Update or develop masterplans for Falls Creek, Mt Buller and Mt Hotham with DTP guidance, and incorporate them into the Alpine Resorts Planning Scheme to streamline applications and reduce the time and cost of planning approvals.	Lead: ARV & DTP Collaborate: Chambers, DWA, Lift Co's, SCCs	2027-2030
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* The full names are included in the Abbreviations list (Appendix C)

Objective 4: Strengthen Partnerships and Amplify the Sector Voice

Activities under Objective 4 progress the following outcomes:

- ✓ *Annual economic output increase*
- ✓ *Gross value-added increase*
- ✓ *Jobs supported improvement*

Purpose:

The alpine sector's long-term sustainability relies on forging robust, and trusted partnerships and delivering genuine resort outcomes. We recognise that Victoria's alpine resorts depend on more than just economic viability; they are built on the strength of our relationships – with investors, local communities, government, and industry partners. Working together and elevating our collective voice ensures the needs and opportunities of alpine communities are heard, valued, and acted upon, securing equitable support and recognition across Victoria.

Collaboration is our path forward: together, we create destinations and community-integrated alpine experiences, and ensure the mountains remain great places to live, work, play, and invest for generations.

Table 6: Activities to Strengthen Partnerships and Amplify the Sector Voice

ACTIVITY		LEAD*	WHEN
To strengthen community partnerships and amplify the sector's voice, at the sector level we will:			
4.1	Refresh, resource and formalise the Alpine Resorts Industry Advisory Group (ARIAG) as the peak industry advocacy group with a clear mandate, updated Terms of Reference, and a representative, skilled membership	Lead: ARIAG Collaborate: ARV, Chambers, RAs, SCCs,	2026
4.2	Formalise the partnership between ARV and ARIAG by developing an annual planning and engagement framework that leverages industry support and advances shared objectives for the alpine resorts.	Lead: ARIAG & ARV Collaborate: SCCs	2026
4.3	Create and implement a unified alpine sector advocacy agenda focused on regulatory and funding reform, infrastructure needs, climate resilience, the economic significance of the sector, and recognition of its unique challenges.	Lead: ARIAG Collaborate: ARV, SCCs	2026
4.4	Commission the 2029 Economic Impact Study to update the sector's economic, social and environmental value — including a robust valuation of environmental benefits — and use this evidence to underpin all advocacy and communications.	Lead: ARV Collaborate: ARIAG, SCCs	2029
4.5	Create opportunities for ARIAG, ARV, government departments, Traditional Owners, resort operators and community representatives to work together on sector-wide challenges and opportunities.	Lead: ARV & ARIAG Collaborate: DEECA	Ongoing

* The full names are included in the Abbreviations list (Appendix C)

Objective 5: Advance Traditional Owner Involvement and Partnerships

Activities under Objective 5 progress the following outcomes:

- ✓ *Current and future generations of Traditional Owners self-determination*
- ✓ *Traditional Owners are actively engaged and empowered to care for, protect and improve alpine Country.*

Many of these activities are also reflected in the ARV Traditional Owner Engagement and Self-determination Strategy.

Purpose:

Establish and nurture genuine, respectful, and empowering partnerships with Traditional Owners of Victoria's alpine resorts, embedding self-determination as a central pillar in planning, management, and decision-making processes.

This objective aims to achieve acknowledgement and support for Traditional Owner voices, rights, interests, and objectives, contributing meaningfully to economic, social, cultural, and environmental outcomes across the alpine sector. In doing so, the sector will walk alongside and participate in the Victorian Government's commitment to Treaty, recognition, and advancement of Aboriginal self-determination.

Table 7: Activities to Advance Traditional Owner Involvement and Partnerships

ACTIVITY		LEAD*	WHEN
To advance Traditional Owners rights and obligations to be embedded into planning and management of alpine resorts, at the sector level we will:			
5.1	Develop employment pathways for Traditional Owners to work on alpine Country, aligned with sector-relevant skills and Traditional Owner objectives in Country Plans.	Lead: ARV Collaborate: RAPs, TOGs, ARIAG, DEECA	2026-2028 then ongoing
To advance Traditional Owners rights and obligations to be embedded into planning and management of alpine resorts, at the resort level we will:			
5.2	Conduct annual strategic planning days with RAPs to develop 12-month work plans, ensuring inclusive and transparent decision-making and embedding Traditional Owner perspectives into each alpine resort's strategic direction.	Lead: ARV Collaborate: RAPs, TOGs, Chambers	2027 then ongoing
5.3	Where desired by RAPs, develop and implement formal partnership agreements that define shared objectives, guide relationship-building and establish clear frameworks for collaboration, supporting self-determination and Treaty readiness.	Lead: RAPs, ARV Collaborate: DEECA, DPC	2027
5.4	Subject to agreement with the relevant Traditional Owners and available funding, undertake Strategic Aboriginal Heritage Assessments and/or cultural mapping activities in agreed resorts.	Lead: RAPs, ARV Collaborate: DEECA, DPC	TBD
5.5	Identify and establish cultural gathering spaces at each alpine resort, and integrate Aboriginal storytelling through signage, interpretation, ceremonies and tourism activities.	Lead: RAPs, ARV Collaborate: TOG's, Chambers, DEECA, DPC	TBD
5.6	Support the development and promotion of alpine Traditional Owner-led tourism experiences, ensuring visibility, recognition and direct economic benefit for alpine Traditional Owners.	Lead: RAPs, Visit Vic Collaborate: ARV, TOG's, RDV, Chambers	TBD

* The full names are included in the Abbreviations list (Appendix C)

Objective 6: Identify Growth Barriers and Seek Investment to Develop the Green Season

Activities under Objective 6 progress the following outcomes:

- ✓ *Annual visitation growth*
- ✓ *Annual economic output increase*
- ✓ *Gross value-added increase*

Purpose:

Develop a comprehensive understanding of current and future demand for alpine green season offerings and identify the key barriers to investment. This evidence will guide decision making, inform investment priorities and strengthen sector advocacy for ongoing policy and funding support.

Table 8: Activities to Identify Investment Barriers and Source

ACTIVITY		LEAD*	WHEN
To identify investment barriers and seek investment to grow visitation in the green season, at the sector level we will:			
6.1	Conduct a market demand analysis of current and forecast visitor demand for alpine green-season experiences — including demographic trends and visitor preferences — to update the Victorian Alpine Resorts Visitor Economy Development Plan.	Lead: ARV Collaborate: DGipp, TNE, VV	2026-2027
6.2	Identify the barriers and enablers to green-season growth by assessing operational, regulatory, infrastructure and environmental constraints, and gathering insights from existing green-season event operators.	Lead: ARV Collaborate: Chambers, Event Operators, RAs, RDV SCCs	2026-2027
To identify investment barriers and seek investment to grow visitation in the green season, at the resort level we will:			
6.3	Use insights from the market demand analysis to scope product development opportunities in market-driven locations, and work with public and private partners to secure investment in opportunities at the identified resorts.	Lead: ARV Collaborate: RDV VV SCCs	2028-2030

* The full names are included in the Abbreviations list (Appendix C)

Implementing and Monitoring the Plan

The diversity of organisations, issues and interests across the alpine sector means no single entity can deliver the whole of sector effort required to achieve the vision. Effective implementation of the ARSP will rely on strong formal and informal collaboration arrangements to ensure integrated delivery. At the resort level, the development and implementation of Integrated Resort Management Plans will clarify responsibilities, establish ownership of outcomes and embed clear reporting mechanisms that support accountability.

The ARSP outlines indicative timeframes and identifies the lead organisation for each activity under the six objectives. With support from action leads, ARV will report annually on implementation progress to the resort Stakeholder Consultative Committees, which will oversee delivery of the Plan.

The ARSP will guide investment over the next five years, informing business cases, funding applications and budget bids by ARV and, where appropriate, other partners. While some activities may be delivered within ARV's approved budget, additional funding and/or workforce resources for other actions will be subject to annual budget processes and service delivery priorities.

A monitoring, evaluation, reporting and improvement framework will be developed around the five yearly Economic Significance Study to assess whether the Strategy is achieving its intended outcomes and to support continuous improvement.

Table 9: Activities to implement and evaluate the Strategy

ACTIVITY		LEAD*	WHEN
1.	Oversee implementation of the Plan	Lead: ARV Collaborate: SCCs	2026-2030
2	Apply this Plan to inform business cases, funding applications, budget bids for future funding needs. These should highlight the economic, social and environmental benefits of the alpine resorts sector implementing this Plan.	Lead: ARV Collaborate: SCCs, RAPs	2026-2030
3.	Report on and evaluate the implementation of this Plan against the intended outcomes.	Lead: ARV Collaborate: ALL	Mid-term evaluation 2028 Final evaluation 2030

* The full names are included in the Abbreviations list (Appendix C)

Appendix A - About the Alpine Resorts Strategic Plan

Under the *Alpine Resorts (Management) Act 1997* (the Act) the functions of ARV include to develop the alpine resorts strategic plan. The Act includes direction on the structure, purpose and content of the plan.

The Plan must:

- ✓ provide for the long-term strategic objectives for the alpine resorts and set out the principles that are to be followed to achieve those objectives;
- ✓ set out the challenges to be faced by, and opportunities presented to, the alpine resorts;
- ✓ identify the priorities for the protection, management and use of each alpine resort;
- ✓ set out the actions that may be taken to:
 - achieve the object of the Act and alpine resorts principles;
 - implement the plan;
 - contain any matters specified by the Ministerial directions or statement of obligations;
 - *set out management plans for each alpine resort that address the specific needs and characteristics of each resort.* (Note: Individual resort management plans will be developed in 2026).

The Act specifies requirements for consultation.

ARV must consult with:

- ✓ the stakeholder consultative committee appointed for each resort; and
- ✓ representatives of traditional owner groups;
- ✓ any Minister or public authority whose area of responsibility Alpine Resorts Victoria considers is likely to be affected by the plan;
- ✓ the municipal council of any municipal district that is adjacent to an alpine resort;
- ✓ representatives of the holders of leases over land in the alpine resorts or of licences to use land in the alpine resorts;
- ✓ any other persons or local organisations whose interests Alpine Resorts Victoria considers are likely to be affected by the plan.

Appendix B – Workshop Participants and Contributors

ARV worked with MosaicLab, a specialised community engagement consultancy, to design and deliver a tailored engagement process that both met the legislated requirements and collectively created a plan for the sector, by the sector.

The engagement strategy adhered to the principles of being honest and transparent, inclusive and encouraging of diverse voices, respectful and easy to understand.

The engagement process included:

Introductory Webinar

A webinar was held on Thursday 12 June 2025 to introduce 48 participants to the engagement process ahead of the in-person workshops. The webinar included a context setting session, delivered by ARV, followed by small group breakout sessions.

In-person workshops – Melbourne CBD, South Yarra, Mansfield and Mt Beauty

Workshop participants were asked to collaborate to refine the vision, identify and prioritise strategies and suggest priority actions.

124 participants representing 26 organisations.

- ARV Board
- Alpine Resorts Industry Advisory Group (ARIAG)
- Alpine Body Corporate Management
- Buller Ski Lifts
- Bushwalking Victoria
- Country Fire Authority
- Cross Country Skiers Association Victoria
- DJSIR
- Department of Transport
- Disabled Wintersports Association
- Falls Creek Alpine Association
- Falls Creek Historical Society
- Four Wheel Drive Victoria
- Friends of Mt Stirling
- Olympic Winter Institute of Australia
- Outdoors Victoria
- Parks Victoria
- RDV
- Southern Cross University
- Snow Australia
- Snow Resorts Australia (ASAA)
- Goulburn Murray Climate Alliance
- Hotham Stakeholders Association
- Interschools
- Kangaroo Hoppet
- Mansfield Shire
- Mt Baw Baw Stakeholders Association
- Mt Baw Baw site holder
- Mt Baw Baw stakeholder
- Mt Buller Race Club
- Mt Buller Chamber of Commerce
- Mt Hotham Chamber of Commerce
- Mt Buller Ratepayers Association
- Murrindindi Shire Council
- National Alpine Museum
- North East CMA
- Snowsports Industry Australia
- Team Hotham Winter Sports Club
- Tourism North East
- Visit Victoria
- Victorian National Parks Association
- Victorian Interschools Snowsports Advisory Group

An ARV Board workshop

The ARV Board reviewed the outcomes of the In-person workshop consultation and provided additional insight and strategies for consideration.

Online survey via Engage Victoria platform

ARV hosted the online consultation via Engage Victoria in the form of a question and response survey, from 6 June 2025 to 6 July 2025 for stakeholders and community members of the alpine sector to share their priorities and insights on a range of topics. There were 286 survey respondents, along with 6 individual submissions received from:

- David Pavlich – Hotham community member
- William Gibson – Mt Buller visitor
- Taariq Hassan – Rosanna resident
- Kate Carmichael and Sam Beaver, Policy Lead – Protect Our Winters Australia
- Andrew Paxton, Acting CEO – Murrindindi Shire Council
- Ian McCall, President – Mt Buller Ratepayers Association

Online Sensemaking workshop

A small group of 27 stakeholders participated in a sensemaking workshop to review all of the in-person and online engagement findings develop a revised vision and strategies for ARV to take forward.

Stakeholder Consultation Committees

Each resort has a Stakeholder Consultation Committee (SCC) as required under the *Alpine Resorts (Management) Act 1997*. Each of the SCCs have provided input and feedback on the drafts as the Strategy was developed.

Alpine Resorts Industry Advisory Group

As the peak industry advisory group ARIAG is the proposed lead on a number of priority actions and has provided ongoing input and feedback on the drafts as the Strategy was developed. ARIAG, is made up of a group of voluntary representatives committed and passionate about the sector and is currently limited in its capacity to successfully contribute to the implementation of this plan.

Registered Aboriginal Parties

Engagement and consultation with the Registered Aboriginal Parties relevant to the alpine resorts (Taungurung Land and Waters Council, the Gunaikurnai Land and Waters Aboriginal Corporation, and the Wurundjeri Woi Wurrung Cultural Heritage Aboriginal Corporation) was and continues to be self-determined. Input and feedback on previous drafts have helped shape the Plan to date.

Engagement Reports are all available via the Engage Victoria consultation platform.

www.engage.vic.gov.au/alpine-resorts-strategic-plan-2025

Appendix C - Abbreviations

ARIAG	Alpine Resorts Industry Advisory Group
ARV	Alpine Resorts Victoria
BRV	Better Regulation Victoria
Chambers	Chambers of Commerce per resort.
CMAs	Catchment Management Authorities
DEECA	Department of Energy, Environment and Climate Action
DGipp	Destination Gippsland
DTP	Department of Transport and Planning
DWA	Disabled Wintersports Association
EM Partners	Emergency Management Partners
FTE	Full Time Equivalent (jobs)
GVA	Gross Value Add
LGAs	Local Government Areas
Lift Co's	Lift Companies - Buller Ski Lifts, Falls Creek Ski Lifts (Vail Resorts) and Hotham Lift Company (Vail Resorts)
NFP Lodges	Not for Profit Lodges
NGOs	Non-Government Organisations
PV	Parks Victoria
RAPs	Registered Aboriginal Parties
RDV	Regional Development Victoria
RAPs	Registered Aboriginal Parties
RAs	Ratepayer Associations
SCCs	Stakeholder Consultative Committees
SMEs	Subject Matter Experts
TNE	Tourism North East
TOGs	Traditional Owner Groups
VV	Visit Victoria

Appendix D – Key References

Documents

Climate Change Adaptation Strategy, (2025) Alpine Resorts Victoria and Nation Partners

Economic contribution of tourism to Victoria 2023-24 (unpublished), Alpine Resorts Victoria and SGS Economics

Traditional Owner Engagement & Self-determination Strategy (unpublished) Alpine Resorts Victoria and Yamagigu Consulting

Victorian Alpine Resorts Visitor Economy Development Plan, (2022) Tourism North East, Urban Enterprises

Legislation and Government Reports

Alpine Resorts (Management) Act 1997

First Principles Review of the Traditional Owner Settlement Act 2010

Statewide Treaty Bill to Victorian Parliament

