



FIRST PERSON
CONSULTING

Alpine Resorts Strategic Plan Review

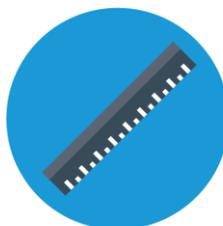
Report

Prepared for

Alpine Resorts Co-ordinating Council



RESEARCH



EVALUATION



DESIGN

www.fpconsulting.com.au

Key contact

Patrick Gilmour

First Person Consulting Pty Ltd

ABN 98 605 466 797

03 9600 1778

pat@fpconsulting.com.au

www.fpconsulting.com.au

Document details

Title: Alpine Resorts Strategic Plan Review—Report

Authors: Rebecca Denniss, Patrick Gilmour

Version: FINAL

Revision date: 22 February 2018

Client: Alpine Resorts Co-ordinating Council

Executive summary

The review of the Alpine Resorts Strategic Plan 2012

The *Alpine Resorts (Management) Act 1997* (the Act) provides the management framework for all Victorian alpine resorts. It established the Alpine Resorts Co-ordinating Council (ARCC) and four Alpine Resort Management Boards (ARMBs). The Act stipulates that a strategic plan must be developed and reviewed every five years. The current Alpine Resorts Strategic Plan (the Strategic Plan) was adopted in 2012 and was due for review at the end of 2017. **This report outlines the findings of a review of the Strategic Plan** and recommendations for future strategic planning in Victoria’s alpine sector.

The objectives of this review were to:

- review and report on the implementation of the Strategic Plan’s objectives and actions
- identify and document lessons and key insights that may inform future plans, strategies or co-ordination of the alpine resorts.

This review is guided by Section 33F(3) of the Act. **Our approach was underpinned by consultation with Victoria’s alpine sector.** This included over 40 interviews with senior ARMB representatives, ARCC members and secretariat staff, relevant government agencies and public authorities, adjacent municipal councils, Traditional Owner groups, key marketing and tourism stakeholders, Alpine Resorts Industry Advisory Group members, alpine resort land user groups, business representatives and other stakeholders. We also reviewed relevant documents and existing data to assess progress against the actions, objectives and goals in the Strategic Plan and the Alpine Resorts Strategic Marketing Plan 2014-2018.

Changing context

A range of contextual factors have changed since the Strategic Plan was developed in 2012. These have influenced co-ordination of the alpine sector and implementation of the Strategic Plan, including: a change in the Victorian Government in late 2014, leading to a renewed focus on climate change; changes in the membership of both the ARCC and ARMBs; and changes in ARMB senior management. Importantly, the concurrent and ongoing Alpine Resorts Governance Reform Project (the Governance Reform Project) is a significant process that was at the forefront of stakeholders’ minds—in some cases influencing the feedback and insights they contributed to this review.

Key findings

Key findings of this review in relation to the implementation of the 2012 Strategic Plan include:

- **Overall, the ARCC has fulfilled its responsibilities for overseeing and monitoring the implementation of the 2012 Strategic Plan.**
- **The majority of planned activities under the 2012 Strategic Plan appear to have been implemented.** However, the extent to which actions in the Strategic Plan have resulted in measurable outcomes in line with the stated objectives is difficult to measure in some instances—partly due to challenges across resorts.
- At the end of 2017, most actions (56 of the 58 actions) under the Strategic Plan were reported as either complete, ongoing or no longer required.

- Some structural and inherent challenges have impacted on the capacity for the ARCC to comprehensively monitor, report on and implement planned activities under the 2012 Strategic Plan.
- **The ARCC appears to have implemented, or made progress towards implementing, the actions in the Strategic Plan for which it was directly responsible.**
- There are some clear examples of positive outcomes for Victoria’s alpine sector since 2012, for example:
 - winter visitor numbers have increased 5.3% per annum between 2012 and 2017, and winter visitor days have increased 2.8% per annum in the same period
 - the Gross State Product (GSP) attributable to Victoria’s alpine resorts in winter has increased GSP 4.8% per annum between 2011 and 2016 (see also the table below).

Strategic objective	Implementation of actions	Achievement insights and examples
Objective 1: Enhancing the visitor experience and developing resorts	All 11 actions ongoing or completed	Trend increase in winter visitor numbers 5.3% per annum for 2012-2017, and trend increase in winter visitor days 2.8% per annum for 2012-2017. Development, implementation and monitoring of the Strategic Marketing Plan 2014-2018.
Objective 2: Delivering resort services and infrastructure efficiently and accountably	All 4 actions ongoing or completed	The Victorian Alpine Resorts Development Program was developed and implemented in 2015. Master Plans and asset management planning have been pursued by ARMBs.
Objective 3: Building partnerships	3 actions ongoing 1 action no longer required 1 action delayed	Engagement with Traditional Owners is a key opportunity for improvement in the future.
Objective 4: Respecting the alpine environment	5 actions ongoing or completed 1 action no longer required 1 action delayed	ARCC commissioned the ‘Potential Impacts of Climate Change’ report. Climate change adaptation is a key driver for alpine resorts through the Governance Reform Project.
Objective 5: Broadening access opportunities	All 7 actions ongoing or completed	While access and equity barriers do remain, there is an increasing recognition of the social and cultural diversity of visitors and potential new visitor markets for Victoria’s alpine resorts.
Objective 6: Regulatory reform	All 7 actions ongoing or completed	With the outcome of the Governance Reform Project announced in late 2017, there is an opportunity to improve the governance framework and re-engage key stakeholders in the process.
Objective 7: Financial framework	4 actions completed or ongoing 2 actions no longer required	The ARCC commissioned the recent ‘Economic Significance of Victoria’s Alpine Resorts’ report. Financial sustainability was a concern raised by all ARMBs through stakeholder consultation.
Objective 8: Governance framework	8 actions ongoing or completed 3 actions no longer required	With the outcome of the Governance Reform Project announced in late 2017, there is an opportunity to improve the governance framework and re-engage key stakeholders in the process.

Key findings specifically relating to the implementation of the Strategic Marketing Plan 2014-2018:

- **In conjunction with Visit Victoria, the ARCC has developed the 2014-2018 Strategic Marketing Plan, in line with the key action under Objective 1 of the Strategic Plan.** Implementation and monitoring of the Strategic Marketing Plan will be ongoing until the end of 2018.
- **The ARCC continues to implement the actions in the Strategic Marketing Plan for which it is directly responsible, including KPI monitoring.** The actions implemented and progress towards the achievement of goals reported in this review are interim findings only.

Key findings in relation to strategic planning for Victoria’s alpine sector more widely:

- **Most stakeholders consider the six objectives outlined in the 2012 Strategic Plan and the four goals outlined in the 2014-2018 Strategic Marketing Plan to be relevant and important priorities for Victoria’s alpine sector.**
- A range of challenges and contextual factors have impacted on implementation and monitoring of the Strategic Plan and Strategic Marketing Plan by government and non-government stakeholders. In particular, these include limitations of the governance structure and tensions between some sector-wide objectives and goals.
- **Alpine sector stakeholders appear to be dissatisfied with current governance arrangements.** This was reflected in the attitudes and perceptions of stakeholders consulted through this review. The Governance Reform Project offers an opportunity to clarify roles and responsibilities and for the sector to agree on an approach for delivering the Victorian Government’s strategic priorities for alpine resorts going forward.
- **Overall, the current governance structure did not substantively impede implementation of the 2012 Strategic Plan.** However, the delivery model for sector-wide marketing campaigns was raised as a significant area of concern for stakeholders.

While, overall, the ARCC appears to have fulfilled its role in supporting the co-ordination of Victoria’s alpine resorts under the Strategic Plan, **this review has highlighted a range of challenges for ongoing strategic co-ordination.** Notably, these include some inherent challenges with collaboration between alpine resorts—influenced by the structure of sector-wide governance, competing interests within the sector, and tension between some of the sector-wide objectives and goals in current sector-wide strategic planning. Ongoing challenges with sector-wide marketing were also raised—particularly in relation to stakeholder dissatisfaction with the delivery of statewide marketing campaigns (Snow Victoria), and balancing opportunities for both collaborative marketing approaches across the alpine sector as well as individual resort-based or regional marketing.

While there are ongoing challenges for the Victorian Government, there are also opportunities for improving the future strategic planning of Victoria’s alpine resorts—which we have identified through our review recommendations below. Ultimately, in relation to future strategic planning, there is a strong sense that there are opportunities for collaboration, but also a recognition that the strength and value of Victoria’s alpine resorts is in their diversity of identities and offerings.

Recommendations

For future strategic planning for Victoria’s alpine sector:

1. **Future strategic planning should be focused on establishing a flexible and collective approach among alpine sector stakeholders to implement the strategic priorities for alpine resorts set by the Victorian Government.** In alignment with the requirements of the Act and strategic priorities of the government of the day, alpine stakeholders should continue to collaborate while maintaining the strengths and unique value of each alpine resort. This must be underpinned by a consultation process that is truly collaborative and re-establishes buy-in and ownership among key government and non-government stakeholders. Such a process would also help ensure stakeholders clearly understand and are accountable for their respective responsibilities in developing, implementing and monitoring the next Strategic Plan.
2. **The next iteration of the Strategic Plan should include fewer operational-level actions, and instead focus on providing high-level strategic priorities and guidance for how these are to be implemented.** We recommend that ‘strategic priorities’, ‘intended outcomes’ and a small number of high-level indicators for success would be more appropriate. Operational-level guidance could be provided through resort-level planning and reviewed on an annual basis.
3. **Monitoring, reporting and review processes around strategic co-ordination should be improved,** including:
 - reviewing the current KPIs for evaluating strategic outcomes and setting clear targets for their achievement, ensuring that measurement of KPIs appropriately demonstrates the impact of the Strategic Plan (for example, using indicators that are less sensitive to factors such as variability in snowfall)
 - ensuring standardised measurement of KPIs by ARMBs and other relevant delivery agencies (for example, by mandating KPI reporting through ARMB Corporate Plans)
 - annually reviewing performance against the KPIs under the strategic priorities and intended outcomes set out in the next Strategic Plan to ensure ongoing relevance to sector stakeholders and the Victorian Government.
4. **Strategic planning for Victoria’s alpine resorts should be more clearly integrated and aligned with complementary strategies and policies.** This should be achieved by working with all agencies and stakeholder groups necessary for meeting the objectives of the Act, including, but not limited to:
 - Parks Victoria, on cross-tenure management and opportunities for increased collaboration on land management and tourism ventures
 - the Department of Environment, Land, Water and Planning’s (DELWP or the Department) Planning Division, ensuring that responsibilities of the Minister for Planning are recognised and that alpine resorts strategic planning is appropriately integrated with Victoria’s Planning Scheme
 - Emergency Management Victoria, ensuring clear strategic alignment with regional emergency management planning, improving administration and resource management, and continuing to adapt to the impacts of climate change

- Vic Roads, continuing to improve collaboration on the maintenance, development and safety of road infrastructure and communications with road users
 - Traditional Owner groups (see Recommendations 5 and 6 below).
5. **Any future Strategic Plan should demonstrate alignment to existing Joint Management Plans, Aboriginal Corporations’ strategic plans, and any other relevant policy or strategy documents**—and clearly articulate how ARMBs can support the achievement of the key priorities outlined in these documents. This should particularly include articulation of the role for ARMBs to work with Traditional Owner groups, local governments and Parks Victoria to pursue opportunities that lead to greater economic development for Indigenous communities and greater participation of Traditional Owners in social, cultural and economic activities in Victoria’s alpine areas. This should be supported by clear KPIs and targets, and any initiatives should be appropriately resourced.
6. **The representation of Traditional Owners in alpine resorts governance should be strengthened.** This may include: Indigenous membership on the ARCC or relevant Victorian Government boards, Indigenous representation on ARMBs, and working to establish and continually strengthen formalised engagement between Traditional Owner groups and ARMBs, and other alpine sector stakeholders.

In relation to strategic sector-wide marketing in Victoria’s alpine sector:

7. **The Victorian Government should revise its approach to sector-wide strategic marketing for the state’s alpine resorts.** This should include:
- Re-establishing buy-in, commitment and shared ownership for sector-wide marketing among Victoria’s alpine stakeholders—ensuring successful campaigns, value for money in marketing investment, and alignment to wider strategic priorities.
 - Agreement and clear communication of the roles and responsibilities for the management and delivery of sector-wide marketing among key government and non-government alpine stakeholders.
 - Alignment with the Victorian Government’s existing strategic priorities for increasing visitor numbers, regional economic development and statewide tourism growth.
8. **Future sector-wide marketing should be consistent with the Victorian Government’s existing framework for marketing management and statewide tourism campaigns.** Any changes should be made after implementation of the Strategic Marketing Plan 2014-2018 is complete, and may involve:
- Visit Victoria assuming responsibility for the management of sector-wide marketing for the state’s alpine resorts (including delivering statewide campaigns for Victoria’s alpine sector across both white and green seasons).
 - Regional Tourism Boards delivering year-round regional campaigns for alpine resort tourism.
 - Visit Victoria, in consultation with the Department and ARMBs, leading the development and implementation of a future sector-wide Strategic Marketing Plan, including monitoring and reporting. We recommend that the Department is not directly involved in the delivery of marketing campaigns, but continues to act as the

conduit between the wider Victorian Government and the alpine sector in relation to sector-wide marketing.

9. **The evidence base that supports decision-making about collaborative marketing in the alpine sector should continue to be strengthened across both green and white seasons—** with particular focus on:
- understanding new and emerging markets
 - the effectiveness of campaign approaches
 - consistency in the monitoring of visitation numbers
 - ongoing alignment with the Victorian Government’s wider tourism and economic development priorities.

For the Victorian Government’s overarching management and co-ordination of alpine resorts going forward:

10. In light of the Governance Reform Project outcome, **the roles, responsibilities and functions of relevant Victorian Government agencies within the scope of legislative requirements should be determined and clearly communicated to all government and non-government stakeholders.**
11. **The Victorian Government should continue to strengthen the evidence-base used to inform strategic management of the state’s alpine resorts.** There is a clear role for the Victorian Government to continue undertaking research and collating evidence to inform decision-making and strategic direction for the alpine sector.
12. **The Department should focus on re-establishing buy-in from key stakeholders, using the development of the new Strategic Plan as a process for engaging ARMBs and key stakeholders** (particularly Traditional Owners and ski lift companies) in a meaningful way.

Contents

Executive summary	ii
The review of the Alpine Resorts Strategic Plan 2012	ii
Changing context	ii
Key findings	ii
Recommendations	v
1 Introduction	1
1.1 Overview	1
1.2 Objectives and scope of this review	1
1.3 Context for the review	2
2 Review approach	5
2.1 Overview of methods and synthesis	5
2.2 Limitations	5
2.3 Structure of this report	6
3 Findings in detail	7
3.1 Fulfilment of ARCC’s responsibilities under the Strategic Plan	7
3.2 Implementation of activities and progress towards strategic objectives	8
3.3 Stakeholder insights relating to the Strategic Plan and future strategic co-ordination	15
3.4 Achievement of strategic marketing goals	18
3.5 Stakeholder insights relating to sector-wide marketing	21
4 Key findings and recommendations	23
4.1 Summary	23
4.2 Key review findings	23
4.3 Challenges and opportunities	24
4.4 Recommendations	26
Appendix 1—Actions in the 2012 Strategic Plan and Strategic Marketing Plan 2014-2018	30
Appendix 2—Interview data summary	40
Strategic planning	40
Strategic sector-wide marketing	42

Figures

Figure 1. Framework for Alpine Resorts Strategic Plan 2012.	3
Figure 2. Alpine Resorts Futures Project	4

Tables

Table 1. Fulfilment of ARCC’s responsibilities under the Strategic Plan.....	7
Table 2. Alpine Resorts Strategic Plan actions status 2014-2017.....	8
Table 3. Actions under the Strategic Plan no longer required.....	8
Table 4. Actions under the Strategic Plan delayed at the end of 2017.	9
Table 5. Extent of achievement of Strategic Plan strategic objectives 2012-2017.....	11
Table 6. Interim achievement of Strategic Marketing Plan strategic goals 2014-2017.....	20
Table 7. Opportunities and relevant recommendations for future strategic planning.....	25
Table 8. Actions in the 2012 Strategic Plan and their status at end 2017.....	30
Table 9. Actions in the Strategic Marketing Plan 2014-2018.....	34

Acronyms

the Act	<i>Alpine Resorts (Management) Act 1997</i>
ARCC	Alpine Resorts Co-ordinating Council
ARMB	Alpine Resorts Management Board
CEO	Chief Executive Officer
DELWP or the Department	Department of Environment, Land, Water and Planning
DTPLI	Department of Transport, Planning and Local Infrastructure
EMV	Emergency Management Victoria
FPC	First Person Consulting
the Governance Reform Project	Alpine Resorts Governance Reform Project
GSP	Gross State Product
KPI	key performance indicator
the Minister	Minister for Energy, Environment and Climate Change
RTB	Regional Tourism Board
SCL	ski clubs and lodges
the Strategic Marketing Plan	Alpine Resorts Strategic Marketing Plan
the Strategic Plan	Alpine Resorts Strategic Plan
TNE	Tourism North East
TV	Tourism Victoria (now Visit Victoria)
VARDP	Victorian Alpine Resorts Development Program
VV	Visit Victoria (formerly Tourism Victoria)

1 Introduction

1.1 Overview

The *Alpine Resorts (Management) Act 1997* (the Act) provides the management framework for all Victorian alpine resorts. It established the Alpine Resorts Co-ordinating Council (ARCC) and four Alpine Resort Management Boards (ARMBs). Section 1A of the Act states that, in respect of alpine resorts, provision is to be made:

- (a) for the development, promotion, management and use of the resorts on a sustainable basis and in a manner that is compatible with the alpine environment, having regard to –
 - (i) environmental and ecological considerations, in particular, climate change; and
 - (ii) economic considerations; and
 - (iii) cultural heritage considerations, in particular, Indigenous cultural heritage considerations; and
- (b) for the use of the resorts
 - (i) primarily for alpine recreation and tourism; and
 - (ii) in all seasons of the year; and
 - (iii) by persons from varied cultural and economic groups.

The Act requires the preparation of an ‘Alpine Resorts Strategic Plan’ (the Strategic Plan). The current five-year plan was established in 2012 and expired at the end of 2017. Under the Act, a review of the Strategic Plan is required every five years.

This document is First Person Consulting’s (FPC) report on the review.

1.2 Objectives and scope of this review

The objectives of the review are to:

- review and report on the implementation of the Strategic Plan’s objectives and actions
- identify and document lessons and key insights that may inform future plans, strategies or co-ordination of the alpine resorts.

In addressing these objectives, the scope of this review included:

- an assessment of whether the ARCC has fulfilled its responsibility for overseeing and monitoring the implementation of the Strategic Plan
- an assessment of whether the ARCC has fulfilled its responsibility for implementing the actions in the Strategic Plan for which it was directly responsible

- an assessment of whether the ARCC, in conjunction with Visit Victoria, has fulfilled its responsibility to date for overseeing the ‘Alpine Resorts Strategic Marketing Plan 2014-2018’ (the Strategic Marketing Plan) as a key action under the 2012 Strategic Plan
- identifying to what extent the overall planned activities were implemented
- identifying factors that may have impacted on the monitoring and implementation of actions over the life of the 2012 Strategic Plan
- undertaking consultation with stakeholders including the Chief Executive Officers (CEOs) of each ARMB, key industry stakeholders, relevant government agencies and ARCC members and secretariat staff as required to facilitate the review, including the incorporation of existing monitoring data and reports
- making recommendations on process improvements for achieving, monitoring and implementing future sector-wide strategic plans.

1.3 Context for the review

1.3.1 Strategic co-ordination of Victoria’s alpine resorts

As described above, the strategic co-ordination of Victoria’s alpine resorts is managed by the ARCC, which comprises:

- the Chair and four members appointed by the Governor-in-Council on the recommendation of the Minister for Energy, Environment and Climate Change (the Minister)
- the Chairs of Mt Hotham ARMB, Mt Buller/Mt Stirling ARMB, Falls Creek ARMB and the Southern ARMB (which includes both Mt Baw Baw and Lake Mountain).

The ARCC is supported by a secretariat, comprising staff seconded from the Department of Environment, Land, Water and Planning (DELWP or the Department).

The ARCC co-ordinated the development of the 2012 Strategic Plan, informed by an extensive stakeholder consultation process. Over the last five years, the ARCC—in conjunction with key government and non-government stakeholders—has overseen implementation, monitoring and reporting of the Strategic Plan, including delivering a range of actions for which it is the lead agency.

We recognise some key contextual changes since the Strategic Plan was developed in 2012 that have influenced co-ordination of the alpine sector and implementation of the Strategic Plan, including: a change in the Victorian Government in late 2014 leading to a renewed focus on climate change; changes in the membership of both the ARCC and ARMBs; and changes in ARMB senior management.

The 2012 Strategic Plan includes six key objectives—in addition to two wider financial and governance objectives, four goals, 58 actions (see Appendix 1) and a range of principles—to guide the co-ordination of alpine resorts management in Victoria (see Figure 1).

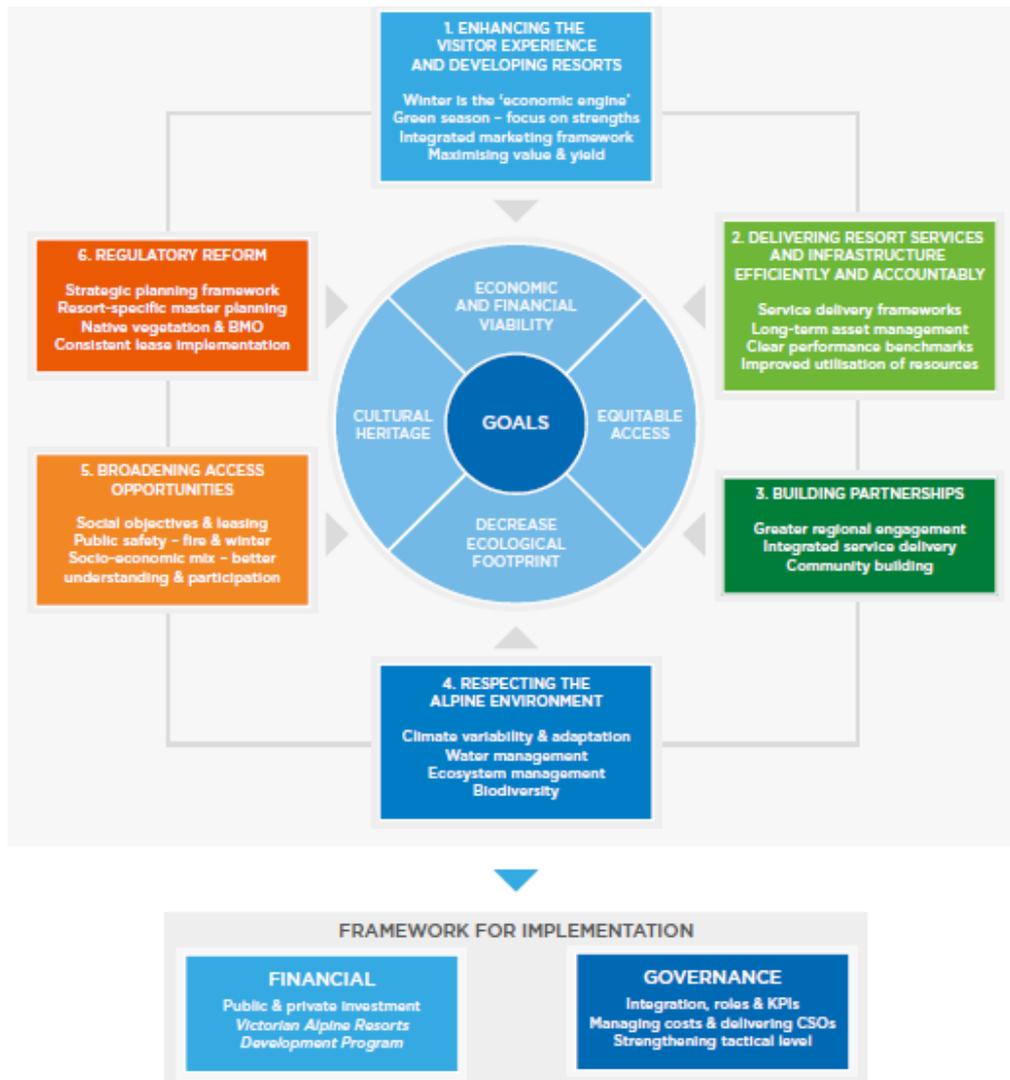


Figure 1. Framework for Alpine Resorts Strategic Plan 2012.¹

The Strategic Marketing Plan 2014-2018 sits under the wider 2012 Strategic Plan. It includes 63 actions (see Appendix 1) under four goals, which are to:

- sustain the winter market
- grow the winter market
- develop and promote the green season
- collaborate to create a seamless visitor experience.

1.3.2 Alpine Resorts Governance Reform

The management and co-ordination of Victoria's alpine resorts is currently undergoing a reform process. The Alpine Resorts Governance Reform Project (the Governance Reform Project) was launched in February 2016, and forms one part of the Victorian Government's Alpine Resort Futures

¹ Victorian Government 2012, Alpine Resorts Strategic Plan, p. 2.

Project (see Figure 2). **While this is not central to our assessment of Strategic Plan implementation between 2012 and 2017, it is an important contextual factor for the review and influenced the insights provided by stakeholders through interviews.**

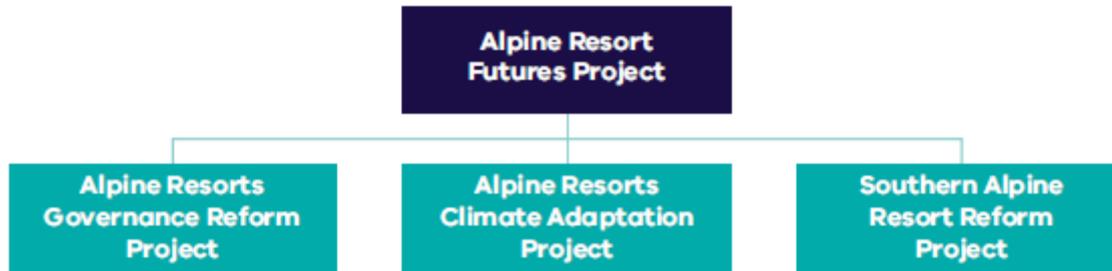


Figure 2. Alpine Resorts Futures Project.²

The Alpine Resorts Governance Reform Discussion Paper was released in January 2017 and notes four key drivers for the reform:

1. Respond and adapt to climate change
2. Sustain economic and social contribution
3. Be financially self-sustainable
4. Other factors: increasing year-round visitation, maintaining competitiveness, advances in technology, access and equity, stable visitation and environmental stewardship.

The Discussion Paper put forward reform options for the future governance of Victoria’s alpine resorts, which included the discontinuation of the ARCC at 31 December 2017. Anticipating the proposed removal of the ARCC under the Governance Reform Project, the ARCC commissioned FPC to independently undertake the review in July 2017.

On 27 November 2017, the Victorian Government announced changes to be made as part of the Governance Reform Project:

- **the ARCC will continue to exist and fulfil its functions as required under the Act, with some membership changes**
- **a new governance model will be implemented for the Falls Creek, Mt Hotham and Mt Buller/Mt Stirling ARMBs—**involving the appointment of four common board members across all ARMBs and three unique members on each ARMB
- **the structure and membership of the Southern ARMB will remain unchanged.**

² Victorian Government 2017, ‘Alpine Resorts Governance Reform Discussion Paper’, p. 10.

2 Review approach

2.1 Overview of methods and synthesis

This review is guided by Section 33F(3) of the Act. Our approach is underpinned by consultation with senior ARMB representatives, ARCC members and secretariat staff, relevant government agencies and public authorities, adjacent municipal councils, Traditional Owner groups, key marketing and tourism stakeholders, Alpine Resorts Industry Advisory Group (ARIAG) members, alpine resort land user groups, business representatives and other stakeholders.

Specifically, the review involved the following components:

- **An inception meeting** between FPC and ARCC secretariat staff on 18 August 2017 to clarify review objectives and scope, and attendance at an ARIAG meeting on 12 September 2017 to introduce the review.
- **A review of relevant documents and existing data** to assess progress against the actions, objectives and goals in the Strategic Plan and Strategic Marketing Plan, and to identify emerging review findings and any gaps to be addressed.
- **40 consultation interviews with a total of 43 individual stakeholders**,³ including:
 - four semi-structured face-to-face interviews with ARMB staff, including Chairs and CEOs undertaken in September 2017.
 - 36 semi-structured phone interviews with other key stakeholders and agencies responsible for key actions in the Strategic Plan and Strategic Marketing Plan undertaken between September and November 2017.
- **Data analysis and development of a review report**, including synthesis of all data sources.
- **Ongoing liaison between FPC and ARCC secretariat staff**, including regular updates and meetings.
- **Presentations of key findings at stakeholder sessions** across regional and metropolitan Victoria.

2.2 Limitations

We recognise the following limitations of this review:

- Findings are based on the data that was provided to us by the ARCC (through regular self-reporting via ARMBs since 2013), and data collected through stakeholder consultation as part of this review.
- The nature of established monitoring and reporting processes for the implementation of the 2012 Strategic Plan and achievement of sector-wide key performance indicators (KPIs) has meant that the achievement of some actions and outcomes is unclear.
- The Strategic Marketing Plan 2014-2018 is still in its implementation phase. Any findings reported in relation to achievement of actions and outcomes are interim only.

³ We note that interview participants were provided the opportunity to review transcripts of their interviews and clarify or change any responses before being analysed and informing development of this report.

- A broad range of stakeholders—with diverse perspectives and interests in the alpine sector, and varying levels of direct involvement with the 2012 Strategic Plan—were interviewed as part of this review. While the Strategic Plan provides high-level strategic direction for the sector, we recognise that there is a limited number of stakeholders with direct operational involvement in delivery of the Strategic Plan’s actions and objectives.
- Various stakeholders were approached to contribute in the review through consultation, but chose not to participate. It is worth noting, however, that all stakeholder groups were represented in the interviews.
- Throughout the consultation process for this review, the Victorian Government had not announced the outcome of the Governance Reform Project, meaning future governance arrangements—and the positions of a range of stakeholders who participated in this review—were uncertain.

2.3 Structure of this report

Section 3 presents detailed findings in response to the first objective of the review—to assess the implementation of the Strategic Plan’s objectives and actions.

Section 4 then presents key findings and recommendations in response to the second objective of the review—to identify and document lessons and key insights that may inform future plans, strategies and the co-ordination of alpine resorts.

3 Findings in detail

Here we provide in-depth results relating to:

- fulfilment of the ARCC’s responsibilities under the Strategic Plan (Section 3.1)
- implementation of planned activities and progress towards achieving strategic objectives (Section 3.2)
- stakeholder insights on the Strategic Plan and future strategic co-ordination (Section 3.3)
- achievement of strategic marketing goals (Section 3.4)
- stakeholder insights relating to sector-wide marketing (Section 3.5).

This is based on our analysis and synthesis of all data sources available to us, including KPI monitoring data, reports, policy documents and stakeholder interviews. A more detailed summary of interview responses is presented in Appendix 2.

3.1 Fulfilment of ARCC’s responsibilities under the Strategic Plan

Overall, the ARCC has fulfilled its responsibilities under the Strategic Plan between 2012 and 2017 (see Table 1).

Table 1. Fulfilment of ARCC’s responsibilities under the Strategic Plan.

ARCC responsibilities	Assessment
Overseeing and monitoring the implementation of the 2012 Alpine Resorts Strategic Plan	<p>In accordance with its statutory functions outlined in the Act, since 2012, the ARCC has overseen and monitored the implementation of the Strategic Plan through:</p> <ul style="list-style-type: none"> • facilitating reporting on the implementation of actions by ARMBs, DELWP and other responsible agencies • collating evidence for the implementation of actions and achievement of KPIs from various data sources and managing this independent review (Action 56) • providing regular progress reports and updates to the Minister for Energy, Environment and Climate Change and to ARIAG.
Implementing the actions in the 2012 Alpine Resorts Strategic Plan for which the ARCC was directly responsible	<p>At the end of 2017, the ARCC had either completed or was continuing to implement all of the actions under the Strategic Plan for which it was directly responsible, except for Action 21.</p> <p>The ARCC made progress on climate change adaptation planning throughout 2017 in line with Action 21. Section 3.2 provides more detail on implementation of actions and achievement of strategic objectives.</p>
Overseeing the ‘Alpine Resorts Strategic Marketing Plan 2014-2018’, as a key action in the Strategic Plan	<p>The ARCC, in partnership with Visit Victoria, developed the 2014-2018 Strategic Marketing Plan, in line with the key action under Objective 1 of the 2012 Strategic Plan.</p> <p>The ARCC continues to implement the actions in the Strategic Marketing Plan for which it is directly responsible, including ongoing KPI monitoring. Section 3.4 provides more detailed evidence on the achievement of the goals outlined in the Strategic Marketing Plan.</p>

3.2 Implementation of activities and progress towards strategic objectives

The majority of planned activities under the Strategic Plan appear to have been implemented.

At the end of 2017, most actions (56) under the Strategic Plan were reported as either complete, ongoing or no longer required (see Table 2).

Table 2. Alpine Resorts Strategic Plan actions status 2014-2017.⁴

Status	December 2014	December 2015	December 2016	December 2017
Completed	14	24	27	29
Ongoing	39	22	21	21
No longer required	0	2	6	6
At risk of delay	5	3	3	0
Delayed	0	7	1	2
Total	58	58	58	58

A number of actions in the Strategic Plan are outside the control of the ARCC and ARMBs and, over time, some actions have become redundant or no longer relevant. For example, advice from DELWP has meant that six actions are now considered to be “no longer required” (see Table 3 below).

Reform of the Lake Mountain and Mt Baw Baw ARMBs has meant that master planning processes required under Action 35 were redundant,⁵ with the ‘Southern Alpine Resorts 2030 Futures Project’ undertaken as an alternative to Master Plans, finalised in 2017.⁶

Table 3. Actions under the Strategic Plan no longer required.⁷

Action	Lead agency	Reason action no longer required
Action 20—Amend the Act to better recognise the alpine resorts’ role in regional development	DELWP	The legislation unit in DELWP advised that there is no plan to amend the <i>Alpine Resorts (Management) Act 1997</i> in the near future. The ARCC considers this action to have become redundant with the initiation of the Alpine Resorts Futures Project (see Section 1.3.2).
Action 24—Develop alpine ecosystems management guidelines and performance measures	DELWP	DELWP advised ARCC in September 2015 that there were no resources available to develop alpine ecosystem guidelines and measures. DELWP directed ARMBs to the <i>Flora and Fauna Guarantee Act 1998</i> , the <i>Environment Protection and Biodiversity Conservation Act 1999</i> and relevant Parks Victoria plans and strategies to guide overall management of alpine ecosystems.
Action 45—Clearly identify and define Community	DELWP	In August 2016, DELWP and the Department of Treasury and Finance advised that CSOs are considered to be statutory

⁴ ARCC 2016, ‘Alpine Resorts Strategic Plan 2012 Implementation Monitoring Report: 2016’; updated advice provided by ARCC at end 2017.

⁵ ARCC 2016, ‘Alpine Resorts Strategic Plan 2012 Implementation Monitoring Summary Report: 2016’.

⁶ ARCC 2017, ‘Alpine Resorts Strategic Plan 2012: Mid-Year Monitoring Report 2017’.

⁷ ARCC 2016, ‘Alpine Resorts Strategic Plan 2012 Implementation Monitoring Summary Report: 2016’; updated advice provided by ARCC at end 2017.

Service Obligations (CSOs), including their calculation, and seek government agreement to the level and nature of future CSO provision that is required		functions of ARMBs and that boards have the ability to generate funding to support these statutory functions.
Action 46—Measure and incorporate relevant CSO costs in corporate plans	ARMBs	This action was contingent upon Action 45 and is therefore redundant.
Action 48—Minister to provide annual Statements of Expectations to ARMBs and ARCC	DELWP	DELWP Land Governance advised that Ministerial Directions, when used judiciously, are a functionally superior and role appropriate means by which the Minister may clarify expectations. Ministerial Directions were consolidated and issued as part of a new Minister-endorsed corporate planning guideline.
Action 49—Industry level (tactical) functions will be agreed and implemented	DELWP	DELWP advised in March 2015 that Action 49 is no longer considered to be relevant since the roles and responsibilities of agencies and groups are clearly set out in the Strategic Plan.

Only two actions were reported to have been delayed at the end of 2017 (see Table 4). The ARCC was the lead agency for one of the delayed actions. However, throughout 2017, the ARCC made clear progress in the relevant area of climate change adaptation planning.

Table 4. Actions under the Strategic Plan delayed at the end of 2017.

Action	Lead agency	Progress to 2017
Action 16—Develop and report on alpine resort-specific stakeholder engagement plans as part of the corporate planning process, including annual reporting back to stakeholders	ARMBs	<p>ARMBs continue to improve their methods and effectiveness of stakeholder engagement, supported by the Department in refining corporate planning and reporting processes.⁸</p> <p>We note that progress towards implementing formal stakeholder engagement plans is still occurring for one ARMB (see Table 5 for more detail).</p>
Action 21—Develop and implement industry and resort-specific climate adaptation plans	ARCC	<p>Progress on this action was delayed due to foundational work being influenced by statewide climate change policy and legislative changes in early 2017 (see Section 3.3.4 for more detail).</p> <p>However, we note the following relevant activities undertaken by the ARCC:</p> <ul style="list-style-type: none"> • Commissioning the ‘Potential Impacts of Climate Change on Victorian Alpine Resorts’ report, and developing a communications plan to assist ARMBs. • Developing guidance on climate change risk governance for alpine resort entities. • Collating a list of climate change adaptation initiatives currently implemented by resorts. • Participation on the Alpine Resort Sector Vulnerability Assessment (Social and Economic) Project.⁹

⁸ ARCC 2016, ‘Alpine Resorts Strategic Plan 2012 Implementation Monitoring Summary Report: 2016’.

Despite the high level of achievement of planned actions, the extent to which these actions have resulted in measurable outcomes in line with the stated objectives is less clear. This, in part, relates to a lack of consistency in monitoring and reporting by ARMBs and other lead agencies. Challenges with monitoring and reporting raised by key stakeholders are discussed in detail in Section 3.3.3 below.

Table 5 on the following page presents the completion of actions under each objective of the Strategic Plan, relevant KPI measures, and key examples and insights on the achievement of each strategic objective.

⁹ ARCC 2017, 'Alpine Resorts Strategic Plan 2012: Mid-Year Monitoring Report 2017'.

Table 5. Extent of achievement of Strategic Plan strategic objectives 2012-2017.

Strategic objective	Implementation of actions ¹⁰	Relevant KPIs	KPI achievements ¹¹	Key examples, insights and opportunities ¹²
Objective 1: Enhancing the visitor experience and developing resorts	All 11 actions ongoing or completed	Trend growth in visitor numbers to be at least 2% per annum for 2012–2017	Achieved Trend increase in winter visitor numbers 5.3% per annum for 2012-2017, and trend increase in winter visitor days 2.8% per annum for 2012-2017.	<ul style="list-style-type: none"> As a key action under this objective, the ARCC worked with ARMBs and other resort stakeholders to develop and implement the 2014-2018 Strategic Marketing Plan (see Section 3.4 for more detail). There is evidence of a concerted effort by government and non-government stakeholders to continue investing in and developing year-round product offerings and visitor experiences across the white and green seasons (for example, investment in the Falls-Hotham Alpine Crossing, and the 7 Peaks Ride with support from Visit Victoria and Regional Tourism Boards) (RTBs)). There is some disagreement among stakeholders about the value of green season investment versus continuing to invest in the winter season, particularly given the much higher level of profitability that winter activities afford to some stakeholder groups. There are opportunities for increased Traditional Owner engagement under this strategic objective—for example, further integrating Indigenous cultural heritage into the visitor experience at alpine resorts (see also Objective 3).
		Average annual winter occupancy rates for 2016–20 to be at least 20% higher than 2010–2015	Some achievement reported KPI not due to be reported until 2020. Three ARMBs advise of some increases.	
Objective 2: Delivering resort services and infrastructure	All 4 actions ongoing or completed	Five-year alpine public investment program funded	Achieved The Victorian Alpine Resorts Development Program (VARDP) was developed and	<ul style="list-style-type: none"> Resort Master Plans have been completed for Falls Creek, Mt Buller/Mt Stirling and Mt Hotham ARMBs, which were approved by the Minister in 2016. Lake Mountain and Mt Baw Baw have been directed to

¹⁰ ARCC 2016, 'Alpine Resorts Strategic Plan 2012 Implementation Monitoring Report: 2016'.

¹¹ ARCC 2017, 'Alpine Resorts Strategic Plan 2012: Mid-Year Monitoring Report 2017'. Please note that in many cases monitoring data provided by the ARCC relies on information reported to the ARCC by ARMBs and other responsible agencies.

¹² As reported by stakeholders through consultation, and based on synthesis of evidence provided by the ARCC.

efficiently and accountably			implemented in 2015. Master Plans and asset management planning have been pursued by ARMBs.	undertake Southern Alpine Resorts 2030 Future Project as an alternative to Master Plans, which was submitted to the Minister in 2016 and revised in 2017 <ul style="list-style-type: none"> Although VARDP has been established by the ARCC, no infrastructure development projects have been approved by the Victorian Government for funding through this mechanism. VARDP is accepted as Government policy on alpine sector co-ordination of capital project bids.
		Trend ARMB real unit costs decline at 1% per annum	Not achieved Two ARMBs reported decreases in line with achieving this target.	
		ARMB CSOs identified, agreed with government and funded	No longer relevant Government has advised that ARMB functions are not CSOs. KPI no longer relevant	
Objective 3: Building partnerships	3 actions ongoing 1 action no longer required 1 action delayed—Action 16 (see Table 4)	Indigenous employment opportunities created	Some achievement reported ARMBs reported progress towards the target of working with Traditional Owners to increase opportunities for Indigenous employment.	<ul style="list-style-type: none"> While there are instances of positive engagement with Traditional Owners, this is a key area that has been challenging for some resorts and presents an opportunity for improvement in the future. For example, improved integration of alpine resorts planning with Aboriginal Corporations' corporate plans and engagement strategies, and through strengthening partnerships with other agencies, including Aboriginal Corporations, Parks Victoria and shire councils on increasing Indigenous participation in social, cultural and economic activities in Victoria's alpine areas. There are some examples of effective partnerships between resorts on operational service delivery, but there remains substantial opportunity for further co-ordination and partnership between the resorts (see Section 3.3.2)
		Events celebrating resort heritage increase	Some achievement reported Three ARMBs reported that the targets of increasing events that celebrate resort heritage have been achieved.	
		ARMBs implement formal stakeholder consultation programs	Some achievement reported Three ARMBs advise that formal stakeholder consultation programs have been implemented.	
Objective 4: Respecting the alpine environment	5 actions ongoing or completed 1 action no longer required 1 action delayed—	Renewable energy to comprise at least 30% of resorts' total energy use by 2020	Some achievement reported One ARMB has achieved 100% renewable energy. One ARMB has achieved 15% renewable energy.	<ul style="list-style-type: none"> Responding to climate change (Action 21) was a priority for ARCC in 2017. ARCC commissioned the 'Potential Impacts of Climate Change' report by the University of Tasmania. Climate change adaptation has also been identified as

Action 21 (see Table 4)	Trend decrease in average annual solid waste disposed per visitor day to be at least 4% per annum	Some achievement reported Three ARMBs report that this target has been achieved.	a key driver for alpine resorts through the Governance Reform Project. <ul style="list-style-type: none"> Balancing economic development, tourism and year-round-use (Objective 1), and environmental management is an ongoing challenge for alpine resorts. 	
	Habitat protection programs in government approved corporate plans implemented	Some achievement reported ARMBs advise that targets for habitat protection programs in government approved corporate plans have been achieved. However, DELWP is yet to confirm this.		
Objective 5: Broadening access opportunities	All 7 actions ongoing or completed	Visitor household income profile approaches state profile	Not achieved Median income for resort visitors is in the \$100,000 - \$149,000 bracket, above Australian median household income of \$75,000 (2016 Census)	<ul style="list-style-type: none"> Some progress has been made in relation to improving inequities associated with leasing arrangements. ARMBs continue to work with the Disabled Winter Sports Association to improve infrastructure and accommodation accessibility. However, access and equity barriers do remain (for example, the financial costs associated with skiing and snowboarding and the exclusion of some socioeconomic groups). There is an increasing recognition of the social and cultural diversity of visitors and potential new visitor markets for Victoria's alpine resorts. There are opportunities to continue progressing work in this space, one of the challenges being a lack of good monitoring data on visitor profiles.
		Visitor ethnicity profile approaches state profile	Not achieved No change in proportion of visitors reporting as Middle Eastern, Asian and Indian from 2011 to 2016. 13% of all resort visitors speak language other than English at home, compared to 28% for Victoria and 22% for Australia (2016 census).	
		Increased number of beds available through central booking services	Not available Information from booking services not available.	
		Range of on-mountain	Some achievement reported	

		services increases	Three ARMBs reported achievement of the target to increase the range of on-mountain services available.	
Objective 6: Regulatory reform	All 7 actions ongoing or completed	Lease inequities removed	Some achievement reported Number of sites having ARC/VSA Agreement Site Rental Provisions fell from 175 in 2012 to 101 in 2017 (45% to 25%).	<ul style="list-style-type: none"> With the outcome of the Governance Reform Project announced in late 2017, there is an opportunity to improve the governance framework and re-engage key stakeholders in the process.
		Planning timelines meet council norms	Some achievement reported One ARMB has advised that this target has been achieved.	
Objective 7: Financial framework	4 actions completed or ongoing 2 actions no longer required	Trend increase in real GSP attributable to resorts to be at least 2% per annum for 2012–2017	Achieved Trend increase in winter GSP 4.8% per annum for 2011–2016.	<ul style="list-style-type: none"> The ARCC commissioned the recent ‘Economic Significance of Victoria’s Alpine Resorts’ report. Financial sustainability was a concern raised by all ARMBs through stakeholder consultation.
		Trend increase in regional jobs attributable to resorts to be at least 2% per annum for 2012–2017	Not achieved Trend decrease in winter jobs 0.2% per annum for 2011–2016.	
		All ARMBs meet government approved corporate plan financial targets	Some achievement reported ARMBs advise that financial targets have been achieved or are on track to be achieved.	
Objective 8: Governance framework	8 actions ongoing or completed 3 actions no longer required	No reported KPIs directly relevant to this objective.		<ul style="list-style-type: none"> Assessing industry performance against KPIs (Action 53) was delayed. However, the ARCC has now completed KPI reporting (see Table 4). With the outcome of the Governance Reform Project announced in late 2017, there is an opportunity to improve the governance framework and re-engage key stakeholders in the process.

3.3 Stakeholder insights relating to the Strategic Plan and future strategic co-ordination

Combined with the review of documents, consultation with stakeholders provided a range of feedback in relation to the Strategic Plan itself and strategic planning within the alpine sector more widely. This feedback provides a range of insights and lessons relevant to future planning and strategic co-ordination in this sector. These specifically relate to:

- structure and content of the Alpine Resorts Strategic Plan 2012 (Section Structure and content of the 2012 Alpine Resorts Strategic Plan 3.3.1)
- the challenges of co-ordination (Section 3.3.2)
- monitoring and reporting (Section 3.3.3)
- the shifting context in which the alpine resorts operate (Section 3.3.4).

3.3.1 Structure and content of the 2012 Alpine Resorts Strategic Plan

- The six objectives in the Strategic Plan are generally viewed by stakeholders as relevant priorities for the sector. Furthermore, stakeholders noted that the Strategic Plan provides useful context for the sector and useful guiding document and reference point.
- Through consultation, the majority of stakeholders reported that they believe there is either “a great deal of value” or “moderate value” in having an overarching strategic plan for the co-ordination of Victoria’s alpine resorts going forward.
- However, to some degree, the 2012 Strategic Plan is seen to align with the priorities that ARMBs would otherwise be pursuing in the absence of a sector-wide strategy. This is perhaps indicative of the low level of awareness of the Strategic Plan among stakeholders other than ARMBs.
- Awareness and influence of the Strategic Plan is relatively low outside ARMBs. ARMBs align the development of their own resort-level strategic planning documents (including corporate plans, Master Plans, consultation plans, etc.) with the Strategic Plan and report to the ARCC on relevant actions and industry KPIs.
- As a high-level, strategic document, the Alpine Resorts Strategic Plan is relatively long, with the large number of individual actions leading to an unwieldy and difficult-to-monitor document. This view was supported by key stakeholders, who noted that while the objectives themselves are relevant, the number of actions and the level of detail in specific actions is inappropriate. In effect, the Strategic Plan is widely viewed as being too operationally focused for what is intended to be a high-level strategic planning document.

3.3.2 Co-ordination across the resorts

- There is broad agreement that there are common strategic objectives that all of Victoria’s alpine resorts should be working towards. However, there is also a strong sense that each individual resort has unique value, strengths and product offerings. Interviewees

encouraged the importance of resorts “playing to their individual strengths” balanced with sector collaboration where valuable and appropriate.

- This tension is also evident in the conflict between the competitive structure of Victoria’s alpine industry (on-mountain commercial operations and the viability of individual ARMBs) and the strategic goal of sector-wide collaboration. For example, interviewees pointed to the challenge of co-ordinating marketing and other collaborative operational actions between alpine resorts when much of the activity is commercial and, therefore, competitive.
- There are also some instances where strategic priorities appear to conflict with each other—for example, tourism development and environmental conservation, as well as winter season infrastructure development and climate change adaptation. Despite the challenges and tensions noted above, ARMBs appear to be improving their collaborative relationships with other ARMBs—something that appears to be driven in part by a change in senior staff. This is a positive outcome for sector-wide co-ordination.
- Collaboration and effective stakeholder consultation in alpine resorts management is, to an extent, dependent on the influence and commitment of individuals in management positions. We also recognise that culture is an important factor influencing co-operation and collaboration within the sector and implementation of strategic priorities.
- It was noted that establishing genuine buy-in from all on and off mountain stakeholders through collaboration will be a crucial component of any future strategic plan.
- There is, in general, a strong sense that having a collective strategic direction across all alpine resorts is necessary and valuable. However, we acknowledge that some barriers to collaboration are accepted within the sector, particularly commercial in confidence concerns.
- There is dissatisfaction about how the strategic direction and collaboration within the sector is being supported by current governance structures—particularly in relation to the role of the ARCC, the management and delivery of sector-wide marketing, support for infrastructure development, and mechanisms to encourage financial sustainability and private and public sector financial investment.
- The value and contribution of Victoria’s alpine resorts to the state is not seen to be reflected and supported by current governance structures and funding models and is a source of frustration within the sector.
- All of the ARMBs highlighted challenges with resources, financial sustainability and infrastructure investment. In particular, stakeholders noted a lack of financial investment from the Victorian Government, despite being key contributors to the Victorian visitor economy and community, key regional tourism stakeholders, and effectively having similar land management and amenity responsibilities as municipal councils. ARMBs highlighted their limited ability to increase revenue without directly passing costs on to consumers and/or potential investors.
- One of the clearest opportunities for improving collaboration between the resorts relates to administration—for example, reducing duplication and improving efficiencies in human resources, accounting and other management processes. However, stakeholders also cautioned about the varying context of each resort that would have to be taken into account.

- Overall, while there have been clear efforts for greater engagement with Traditional Owners, there remain substantial opportunities for improvements in this space. There appears to be a lack of Aboriginal participation in social, cultural and economic activities at Victoria’s alpine resorts, as well as under-representation of Traditional Owners in governance mechanisms, particularly on the ARCC and ARMBs.
- Another key opportunity raised by stakeholders was the need for clearer and more effective integration and alignment with other land management strategies and policies—particularly those of resort-level strategies including ARMB Marketing Plans, Master Plans and Corporate Plans, as well as those of other Victorian Government agencies including:
 - DELWP’s Planning Division—issues with integration of DELWP’s Planning Scheme in resort-level planning.
 - Parks Victoria—opportunities to improve cross-tenure land management, particularly by working with Traditional Owner groups.
 - Emergency Management Victoria (EMV)—opportunities to clarify emergency management planning and allocation of resources with EMV, as there are currently challenges with administration and varying levels of emergency management resources among the resorts.
 - Vic Roads—willingness from Vic Roads to continue strengthening collaboration on road infrastructure maintenance, development and safety, and communication with road users.

3.3.3 Monitoring and reporting

As suggested in the review of KPIs and achievement of actions above (Section 3.1), there are a range of challenges in monitoring and reporting on progress with the Alpine Resorts Strategic Plan 2012.

Progress on a number of KPI targets was based on ARMB reporting (see Table 5 in Section 3.2) and co-ordinated by the ARCC.

Challenges raised by stakeholders through interviews include:

- Accountability, monitoring and reporting are influenced by confidentiality concerns and conflict between the strategic priorities and the commercial/competitive goals of the sector.
- There are issues with duplication in reporting process (for example, the need for ARMBs to produce quarterly financial reports to DELWP as well as providing similar reporting to the ARCC). Key stakeholders also suggested there are issues with the accuracy of some monitoring data (for example, self-reported visitation and snow depth data provided by ARMBs).
- There are potentially too many plans and strategies with too little accountability – the Strategic Plan, resort level strategic plans, Master Plans, engagement plans, marketing plans. In general, these were noted to be ambitious, often without clear or realistic targets. Master Plans, for example, call for investment at an order of magnitude greater than actually available.

- Some stakeholders suggest that the ARCC is an ineffective governance mechanism. This relates to: a perceived lack of genuine stakeholder engagement and consultation with the sector and key stakeholders; perceived lack of capacity for involvement in marketing management and delivery of campaigns; and a view that the sector is over-governed. While these views were not shared among all stakeholders, the existence of these views points to some of the challenges and issues that remain within the sector.

3.3.4 Contextual factors and key changes

Through interviews, stakeholders reported the following key contextual changes that have influenced the co-ordination of the state’s alpine resorts since 2012:

- An increased focus on climate change from the Victorian Government more widely, as well as from the ARCC. We also note the release of major statewide climate policies and legislative changes in 2016 and 2017 (the ‘Victoria’s Climate Change Framework’,¹³ ‘Victoria’s Climate Change Adaptation Plan 2017-2020’¹⁴ and the *Climate Change Act 2017*¹⁵) over the life of the 2012 Strategic Plan.
- Policy and governance changes—including ARMB senior management position appointments, ARCC membership, and Victorian Government elections.
- Economic changes—particularly that during the time the Strategic Plan was being developed in the aftermath of the global financial crisis, and recognition of the increasing proportional economic contribution of the alpine industry to their local economies since 2012. Economic changes were reported by stakeholders to have contributed to constraints on financial sustainability.
- Changing visitation patterns—including an increase in local visitors (particularly from Indian and Asian markets) and more day visitors to alpine resorts, rather than traditional visitors who stay for more extended periods of time.

3.4 Achievement of strategic marketing goals

The ARCC, in partnership with Visit Victoria, developed the 2014-2018 Strategic Marketing Plan, in line with the key action under Objective 1 of the 2012 Strategic Plan.¹⁶

¹³ DELWP 2016, ‘Victoria’s Climate Change Framework’,
<https://www.climatechange.vic.gov.au/__data/assets/pdf_file/0021/55254/DELWPClimateChange_Frameworkrk.pdf>

¹⁴ DELWP 2017, ‘Victoria’s Climate Change Adaptation Plan 2017-2020’,
<https://www.climatechange.vic.gov.au/__data/assets/pdf_file/0024/60729/Victorias-Climate-Change-Adaptation-Plan-2017-2020.pdf>

¹⁵ Parliament of Victoria 2017, *Climate Change Act 2017*,
<[http://www.legislation.vic.gov.au/domino/Web_Notes/LDMS/PubPDocs.nsf/ee665e366dcb6cb0ca256da400837f6b/7bd94eefdee4690dca258073007e0980/\\$FILE/581271bs1.pdf](http://www.legislation.vic.gov.au/domino/Web_Notes/LDMS/PubPDocs.nsf/ee665e366dcb6cb0ca256da400837f6b/7bd94eefdee4690dca258073007e0980/$FILE/581271bs1.pdf)>

¹⁶ Action 7 in the 2012 Strategic Plan was for the ARCC and Visit Victoria (formerly Tourism Victoria) to “develop an integrated model for the overall promotion of Victoria’s alpine resorts, including a five-year Victorian alpine resort strategic marketing plan that co-ordinates and improves promotion at alpine resort, regional, state and national levels”.

The Strategic Marketing Plan includes key actions and a series of industry KPIs, and identifies the lead agencies responsible for delivery. Implementation and monitoring of the Strategic Marketing Plan will be ongoing until the end of 2018, and we recognise that achievements reported here are interim findings.

The ARCC continues to implement the actions in the Strategic Marketing Plan for which it is directly responsible. As the lead agency on a number of actions, the ARCC has delivered the following since 2014:

- undertaken a research program to size the winter market and segment the market (Actions 1 and 8)
- developed a co-operative marketing campaign to raise the profile of snow, re-engage priority markets and inspire a snow holiday (Actions 15, 19, 23 and 24), delivering four winter co-operative marketing campaigns through Snow Victoria (2014-2017 winter seasons)

In addition, through delivery of the Snow Victoria campaign, the ARCC has:

- undertaken four campaign evaluation reports to monitor the campaign's contribution towards shifting perceptions of a snow experience with key priority markets (beginners and lapsed visitors) (Action 22)
- developed a Victorian snow proposition for key priority markets (Action 23)
- reviewed campaign results and return on investment to inform future campaigns (Action 25)
- developed a consistent suite of campaign measurement tools and benchmarks (Action 26)
- digitally enabled co-operative marketing programs to drive increased traffic to all resorts (Action 51).

It appears that the ARCC has been unable to generate positive industry collaboration and support to deliver on Actions 5, 52 and 57.¹⁷

In conjunction with Visit Victoria, the ARCC is responsible for monitoring and reporting on implementation of the Strategic Marketing Plan. However, comprehensive monitoring and evaluation of all actions has not occurred to date, as the ARCC has not received adequate data from lead agencies. This means that **there is a lack of evidence available to report effectively on the implementation of some actions under the Strategic Marketing Plan.**

In 2014, the ARCC delivered an Industry Marketing Forum, at which alpine sector stakeholders and delivery partners discussed implementation of the Strategic Marketing Plan and reported on their achievements (Actions 56 and 58). However, in subsequent years the ARCC has not received support from key industry stakeholders to deliver another forum.

While a range of planned activities under the Strategic Marketing Plan have been implemented by the ARCC, the extent to which actions have resulted in measurable outcomes in line with the stated

¹⁷ “Develop a proactive communication plan with all partners to manage industry-wide key media messages” (Action 5); “Undertake an audit and map the visitor’s path to purchase across all platforms, to visually demonstrate where barriers to purchase exist” (Action 52); “Assist the RTBs with industry engagement, communications and alignment and coordinate marketing to deliver growth” (Action 57).

goals is varied. Table 6 presents the reported interim KPI achievements against the four strategic goals outlined in the Strategic Marketing Plan, based on the information available to date.

A full evaluation of the Strategic Marketing Plan is due at the end of 2018. This review is expected to contain a more detailed analysis of performance, exploring variables such as individual resort performance against key market segments.

Table 6. Interim achievement of Strategic Marketing Plan strategic goals 2014-2017.¹⁸

Goals	Strategies	Relevant KPIs	Progress towards KPI achievements to date
Goal 1: Sustain the winter market	<ul style="list-style-type: none"> Understand and meet the needs of the existing market Develop new skiers by transitioning snow play visitors to skiing/snowboarding Market to priority growth markets including lapsed skiers; make them reconsider a snow holiday 	An increase of 5 per cent in visitor satisfaction over five years	Not available
		Increase the mean ratings out of 5 for all resorts for the following satisfaction measures by 2018:	
		Increase the overall experience rating from 3.8 to 4.0	Not currently on track for achievement ¹⁹ (Average decrease to 3.6 over four years to 2017)
		Increase the overall value for price paid rating from 3.1 to 3.3	Not currently on track for achievement (Average decrease to 3.0 over four years to 2017)
		Increase the customer service rating from 3.8 to 4.0	Not currently on track for achievement (Average no change from 3.8 over four years to 2017)
		Increase the overall skiing/snowboarding experience rating from 4.0 to 4.2	Not currently on track for achievement (Average no change from 4.0 over four years to 2017)
		Increase access to and within the resorts rating from 3.9 to 4.1	Not currently on track for achievement (Average decrease to 3.8 over four years to 2017)
		Increase visitor facilities rating from 3.8 to 4.0	Not currently on track for achievement (Average decrease to 3.6 over four years to 2017)
		Increase overall accommodation rating from 3.9 to 4.1	Not currently on track for achievement (Average increase to 4.0 over four years to 2017)

¹⁸ ARCC 2017, 'Alpine Resorts Strategic Marketing Plan 2014-2018 Measuring success: Interim Report on KPIs 2014-2017'; ARCC 2017, 'Key Performance Indicators – Interim results 2014-2017'.

¹⁹ Noting that in the final evaluation of these KPIs, any changes in average values (up or down) will need to be considered in the context of the survey sample size and associated margin of error.

		Increase alternative activities and entertainment available in-resort from 3.6 to 3.8	Not currently on track for achievement (Average decrease to 3.4 over four years to 2017)
		Increase the average number of snow trips taken each year by regular visitors (those that visit every year).	On track for achievement (Average increase of 6% from 7.2 to 7.7 trips over four years to 2017)
Goal 2: Grow the winter market	<ul style="list-style-type: none"> • Raise awareness of and preference for a Victorian snow holiday experience • Target international growth markets 	Increase the number of first-time snow visitors to the alpine resorts by 1% per annum (5% over 5 years).	On track for achievement (Average increase of 50% over four years to 2017)
		Increase the number of visitors who visit every winter by 7% over five years.	Not currently on track for achievement (Average 10% decrease over four years to 2017)
Goal 3: Develop and promote the green season	<ul style="list-style-type: none"> • Green season product development • Green season promotions 	Increase the number of visitors during the green season by 3% over five years.	On track for achievement (Increased 11% over three years to 2017)
		Increase visitor expenditure during the green season by 5% over five years.	On track for achievement (Increased 5% over five years to 2017)
Goal 4: Collaborate to create a seamless visitor experience	<ul style="list-style-type: none"> • Streamline the visitor journey • Form partnerships and strategic alliances that will lead to long-term growth 	No reported KPIs directly relevant to this goal. Refer to Table 5 in Section 3.2 above for related KPIs and achievements under 2012 Strategic Plan Objective 1 (improving visitor experience) and Objective 3 (building partnerships).	

3.5 Stakeholder insights relating to sector-wide marketing

In addition to the general lessons presented in Section 3.3, stakeholders' feedback provided a range of further insights specifically related to strategic marketing of Victoria's alpine sector:

- It was recognised that while alpine resorts each have different core markets, individual strengths and product offerings, there are opportunities for co-ordinated marketing campaigns across the sector.
- Pursuing green season investment is a key area where the Strategic Marketing Plan has had an influence on the direction of marketing in the sector, with clear evidence of a concerted effort by sector stakeholders to continue investing and developing year-round offerings. However, there is an opportunity to improve collaboration and co-ordination of green season product development and tourism offerings.
- The majority of stakeholders reported that some form of collaborative marketing across Victoria's alpine resorts is valuable and should continue to be pursued as a strategic objective. However, the majority of stakeholders also raised concerns with the current delivery model for statewide alpine marketing campaigns (particularly the role of the ARCC in delivering the Snow Victoria campaign).

We note that stakeholder feedback received through interviews was focused largely on the statewide Snow Victoria campaign, which directly relates to only a handful of the 63 actions in the Strategic Marketing Plan.²⁰ We suggest that this is disproportionate, considering the range of other actions encompassed in the Strategic Marketing Plan.

Importantly, there are conflicting views among stakeholders about the importance of varying levels of marketing in the alpine sector. These differing views tended to reflect the focus and specific interest of the stakeholder groups themselves, with some tension between:

- Regional level—focusing on the wider tourism offerings of the municipalities surrounding alpine resorts, not just the skiing and snowboarding experiences available on the mountains.
- Resort-level—focusing on skiing and snowboarding, but tailored to individual resort destination offerings (for example, cross country focus at Falls Creek).
- Statewide or sector-level snow experiences (not just skiing and snowboarding, but other snow play activities)
- Pure focus on skiing and snowboarding—including at the individual resort or destination level, or at the statewide or sector-wide level
- Pure focus on wider snow experiences—including at the individual resort or destination level, or at the statewide or sector-wide level

Despite this tension, we note that the Strategic Marketing Plan clearly states the level and responsible agency relevant to each specific action. **In some cases, concerns about statewide or sector-wide marketing have been conflated with concerns relevant to regional- or resort-level marketing through interviews.**

Other stakeholder insights revealed through interviews include:

- The delivery model and approach to sector-wide marketing appears to be inconsistent with the wider marketing management and delivery model that exists in Victoria, including Visit Victoria and Regional Tourism Boards (RTBs).
- There is a strong view among stakeholders that the ARCC should not have direct involvement in the delivery of future marketing campaigns. We recognise that it was not initially intended that the ARCC would deliver the Snow Victoria campaign, but, because of circumstances beyond its control, it was the only organisation with capacity at the time.
- Stakeholders suggest that Visit Victoria and RTBs should have more involvement in both green and white season sector-wide marketing. However, we note that there is still an ongoing role for the ARCC in acting as a conduit between the wider Victorian Government and the alpine sector in relation to sector-wide marketing.
- As with the 2012 Alpine Resorts Strategic Plan, the Strategic Marketing Plan has a very large number of actions—arguably too many to be an effective and adaptable strategic document.

²⁰ Delivery of the Snow Victoria campaign can be seen to relate to a range of actions, particularly Action 15 and Actions 22-26.

4 Key findings and recommendations

4.1 Summary

In this section we present the overall findings of the review (Section 4.2) and discuss key challenges and opportunities for the co-ordination of alpine resorts (Section 4.3), as identified through the review. This is based on synthesis of the findings in detail presented in Section 3.

We then present our recommendations for the Victorian Government’s future strategic co-ordination of alpine resorts in Section 4.4.

4.2 Key review findings

The overall findings within the scope of the review are as follows.

Implementation of the 2012 Strategic Plan:

- **Overall, the ARCC has fulfilled its responsibilities for overseeing and monitoring the implementation of the 2012 Strategic Plan.**
- **The majority of planned activities under the 2012 Strategic Plan appear to have been implemented.** However, the extent to which actions in the Strategic Plan have resulted in measurable outcomes in line with the stated objectives is difficult to measure in some instances—partly due to challenges across resorts.
- Some structural and inherent challenges have impacted on the capacity for the ARCC to comprehensively monitor, report on and implement planned activities under the 2012 Strategic Plan.
- **The ARCC appears to have implemented, or made progress towards implementing, the actions in the Strategic Plan for which it was directly responsible.**
- There are some clear examples of positive outcomes for Victoria’s alpine sector since 2012, for example:
 - winter visitor numbers have increased 5.3% per annum between 2012 and 2017, and winter visitor days have increased 2.8% per annum in the same period
 - the Gross State Product (GSP) attributable to Victoria’s alpine resorts in winter has increased GSP 4.8% per annum between 2011 and 2016.

Implementation of the Strategic Marketing Plan 2014-2018:

- **In conjunction with Visit Victoria, the ARCC has developed the 2014-2018 Strategic Marketing Plan, in line with the key action under Objective 1 of the Strategic Plan.** Implementation and monitoring of the Strategic Marketing Plan will be ongoing until the end of 2018.
- **The ARCC continues to implement the actions in the Strategic Marketing Plan for which it is directly responsible, including KPI monitoring.** The actions implemented and progress towards the achievement of goals reported in this review are interim findings only.

Strategic planning for Victoria’s alpine sector more widely:

- **Most stakeholders consider the six objectives outlined in the 2012 Strategic Plan and the four goals outlined in the 2014-2018 Strategic Marketing Plan to be relevant and important priorities for Victoria’s alpine sector.**
- A range of challenges and contextual factors have impacted on implementation and monitoring of the Strategic Plan and Strategic Marketing Plan by government and non-government stakeholders. In particular, these include limitations of the governance structure and tensions between some sector-wide objectives and goals.
- **Alpine sector stakeholders appear to be dissatisfied with current governance arrangements.** This was reflected in the attitudes and perceptions of stakeholders consulted through this review. The Governance Reform Project offered an opportunity to clarify roles and responsibilities and for the sector to agree on an approach for delivering the Victorian Government’s strategic priorities for alpine resorts going forward.
- **Overall, the current governance structure did not substantively impede implementation of the 2012 Strategic Plan.** However, the delivery model for sector-wide marketing campaigns was raised as a significant area of concern for stakeholders.

4.3 Challenges and opportunities

While, overall, the ARCC appears to have fulfilled its role in supporting the co-ordination and monitoring of alpine resorts’ responsibilities under the Strategic Plan, this review has highlighted a range of challenges for ongoing strategic co-ordination. Notably, these issues are similar to those identified in State Services Authority’s 2009 ‘Review of Alpine Resort Areas’ report and that have again been identified through the Governance Reform Project in 2016-2017. **This suggests that many of these challenges may be deeply embedded in the structure and culture of the alpine sector:**

- Among government and non-government stakeholders, there is support for collective strategic direction within the alpine sector through future strategic planning. However, in practice, we recognise that there are some inherent challenges with collaboration between alpine resorts—given the structure of the sector-wide governance and competing interests within the sector. We also acknowledge that culture is an important factor influencing co-operation and collaboration within the sector, and implementation of strategic priorities.
- We note that this is particularly evident in relation to sector-wide marketing. It was recognised that while alpine resorts each have different core markets, individual strengths and product offerings, there are opportunities for collaborative marketing across the sector. The majority of stakeholders reported that some form of sector-wide marketing across Victoria’s alpine resorts is valuable and should continue to be pursued as a strategic objective. However, the majority of stakeholders also raised concerns with the current sector-wide marketing delivery model—we note that this largely refers to the winter co-operative marketing campaign (Snow Victoria) and not the Strategic Marketing Plan 2014-2018 itself.
- There are limitations of the current governance structure of Victoria’s alpine resorts management. These include perceptions that: governance functions are inappropriate and

duplicative; there are cost pressures and issues with the financial sustainability of ARMBs; strategic co-ordination is complex and costly; and that stakeholder engagement needs to be improved.

- A range of stakeholders have questioned the role and influence of the Strategic Plan and have suggested that progress in the sector is driven by the ARMBs and other key stakeholders regardless of the strategic priorities stated in “ARCC plans”. This perception, that the Strategic Plan is an “ARCC plan” and not a sector-wide plan endorsed by the Victorian Government, points to a lack of buy-in and ownership of the Strategic Plan itself.
- There is tension between some of the sector-wide objectives and goals in current sector-wide strategic planning. For example, the ARCC and ARMBs having to balance specific and competing environmental and economic development goals within the Act.
- There appears to be a difference between notional support for strategic co-operation in the alpine sector and what collaboration actually looks like in practice—historically there are only limited examples of resorts working effectively in co-operation with each other. However, stakeholders are increasingly positive about collaboration, with some examples of improved relationships between ARMBs raised through interviews.
- Some stakeholders appear to view the ARCC as an independent governing authority for the state’s alpine sector, rather than understand that its role is to implement the Act, advise the Minister of the day, and co-ordinate the delivery of stated Victorian Government priorities.

We note that structural and cultural challenges within the alpine sector are being addressed through the Governance Reform Project.

While there are ongoing challenges for the Victorian Government, there are also opportunities for improving the future strategic planning of Victoria’s alpine resorts.

Ultimately, there is a sense that there are clear opportunities for collaboration, but also a recognition that the strength and value of Victoria’s alpine resorts is in their diversity of identities and offerings.

Table 7 outlines the key opportunities we identified through this review and the relevant recommendations (presented in detail in Section 4.4).

Table 7. Opportunities and relevant recommendations for future strategic planning.

Opportunities	Relevant recommendations
Developing and implementing future strategic planning in a way that drives collaboration and strategic direction within the industry to address strategic priorities set out by the Minister—but continuing to allow operational flexibility for each of the resorts to implement the strategic direction in a way that capitalises on their individual strengths.	Recommendation 1

Opportunities	Relevant recommendations
Improving the stakeholder engagement processes intended to support collaboration within the alpine sector.	Recommendation 1 Recommendation 6 Recommendation 12
Improving monitoring and reporting processes that support strategic planning within the alpine sector.	Recommendation 2 Recommendation 3
More clearly integrating strategic planning for Victoria’s alpine resorts with complementary strategies and policies.	Recommendation 4 Recommendation 5
Supporting the implementation of co-ordinated statewide marketing through existing tourism and marketing structures within the Victorian Government, particularly through supporting Visit Victoria and RTBs to implement campaigns in both the green and white seasons.	Recommendation 7 Recommendation 8 Recommendation 9
Establishing greater clarity around roles and responsibilities in alpine sector governance and resort management.	Recommendation 1 Recommendation 10
The Department continuing to implement the requirements of the Act and strategic direction set by the Minister of the day—acting as the interface between the Minister, the wider Victorian Government and the alpine sector.	Recommendation 11 Recommendation 12

4.4 Recommendations

We recognise that among government and non-government stakeholders there is support for having an overarching strategic direction for Victoria’s alpine sector. Directly following the opportunities and challenges presented in Section 4.3, we present the following recommendations.

For future strategic planning for Victoria’s alpine sector:

1. **Future strategic planning should be focused on establishing a flexible and collective approach among alpine sector stakeholders to implement the strategic priorities for alpine resorts set by the Victorian Government.** In alignment with the requirements of the Act and strategic priorities of the government of the day, alpine stakeholders should continue to collaborate while maintaining the strengths and unique value of each alpine resort. This must be underpinned by a consultation process that is truly collaborative and re-establishes buy-in and ownership among key government and non-government stakeholders. Such a process would also help ensure stakeholders clearly understand and are accountable for their respective responsibilities in developing, implementing and monitoring the next Strategic Plan.
2. **The next iteration of the Strategic Plan should include fewer operational-level actions, and instead focus on providing high-level strategic priorities and guidance for how these are to be implemented.** We recommend that ‘strategic priorities’, ‘intended outcomes’ and a small

number of high-level indicators for success would be more appropriate. Operational-level guidance could be provided through resort-level planning and reviewed on an annual basis.

3. **Monitoring, reporting and review processes around strategic co-ordination should be improved**, including:
 - reviewing the current KPIs for evaluating strategic outcomes and setting clear targets for their achievement, ensuring that measurement of KPIs appropriately demonstrates the impact of the Strategic Plan (for example, using indicators that are less sensitive to factors such as variability in snowfall)
 - ensuring standardised measurement of KPIs by ARMBs and other relevant delivery agencies (for example, by mandating KPI reporting through ARMB Corporate Plans)
 - annually reviewing performance against the KPIs under the strategic priorities and intended outcomes set out in the next Strategic Plan to ensure ongoing relevance to sector stakeholders and the Victorian Government.
4. **Strategic planning for Victoria’s alpine resorts should be more clearly integrated and aligned with complementary strategies and policies.** This should be achieved by working with all agencies and stakeholder groups necessary for meeting the objectives of the Act, including, but not limited to:
 - Parks Victoria, on cross-tenure management and opportunities for increased collaboration on land management and tourism ventures
 - DELWP’s Planning Division, ensuring that responsibilities of the Minister for Planning are recognised and that alpine resorts strategic planning is appropriately integrated with Victoria’s Planning Scheme
 - EMV, ensuring clear strategic alignment with regional emergency management planning, improving administration and resource management, and continuing to adapt to the impacts of climate change
 - Vic Roads, continuing to improve collaboration on the maintenance, development and safety of road infrastructure and communications with road users
 - Traditional Owner groups (see Recommendations 5 and 6 below).
5. **Any future Strategic Plan should demonstrate alignment to existing Joint Management Plans, Aboriginal Corporations’ strategic plans, and any other relevant policy or strategy documents**—and clearly articulate how ARMBs can support the achievement of the key priorities outlined in these documents. This should particularly include articulation of the role for ARMBs to work with Traditional Owner groups, local governments and Parks Victoria to pursue opportunities that lead to greater economic development for Indigenous communities and greater participation of Traditional Owners in social, cultural and economic activities in Victoria’s alpine areas. This should be supported by clear KPIs and targets, and any initiatives should be appropriately resourced.
6. **The representation of Traditional Owners in alpine resorts governance should be strengthened.** This may include: Indigenous membership on the ARCC or relevant Victorian Government boards, Indigenous representation on ARMBs, and working to establish and continually strengthen formalised engagement between Traditional Owner groups and ARMBs, and other alpine sector stakeholders.

In relation to strategic sector-wide marketing in Victoria’s alpine sector:

7. **The Victorian Government should revise its approach to sector-wide strategic marketing for the state’s alpine resorts.** This should include:
 - Re-establishing buy-in, commitment and shared ownership for sector-wide marketing among Victoria’s alpine stakeholders—ensuring successful campaigns, value for money in marketing investment, and alignment to wider strategic priorities.
 - Agreement and clear communication of the roles and responsibilities for the management and delivery of sector-wide marketing among key government and non-government alpine stakeholders.
 - Alignment with the Victorian Government’s existing strategic priorities for increasing visitor numbers, regional economic development and statewide tourism growth (as outlined in the ‘Victorian Visitor Economy Strategy Action Plan 2016–2020’²¹).
8. **Future sector-wide marketing should be consistent with the Victorian Government’s existing framework for marketing management and statewide tourism campaigns.** Any changes should be made after implementation of the Strategic Marketing Plan 2014-2018 is complete, and may involve:
 - Visit Victoria assuming responsibility for the management of sector-wide marketing for the state’s alpine resorts (including delivering statewide campaigns for Victoria’s alpine sector across both white and green seasons).
 - RTBs delivering year-round regional campaigns for alpine resort tourism.
 - Visit Victoria, in consultation with the Department and ARMBs, leading the development and implementation of a future sector-wide Strategic Marketing Plan, including monitoring and reporting. We recommend that the Department is not directly involved in the delivery of marketing campaigns, but continues to act as the conduit between the wider Victorian Government and the alpine sector in relation to sector-wide marketing.
9. **The evidence base that supports decision-making about collaborative marketing in the alpine sector should continue to be strengthened across both green and white seasons—** with particular focus on:
 - understanding new and emerging markets
 - the effectiveness of campaign approaches
 - consistency in the monitoring of visitation numbers
 - ongoing alignment with the Victorian Government’s wider tourism and economic development priorities.

²¹ Department of Economic Development, Jobs, Transport and Resources 2016, ‘Victorian Visitor Economy Strategy Action Plan 2016–2020’, https://economicdevelopment.vic.gov.au/__data/assets/pdf_file/0006/1340979/Visitor_Economy_Strategy.pdf

For the Victorian Government’s overarching management and co-ordination of alpine resorts going forward:

10. In light of the Governance Reform Project outcome, **the roles, responsibilities and functions of relevant Victorian Government agencies within the scope of legislative requirements should be determined and clearly communicated to all government and non-government stakeholders.**
11. **The Victorian Government should continue to strengthen the evidence-base used to inform strategic management of the state’s alpine resorts.** There is a clear role for the Victorian Government to continue undertaking research and collating evidence to inform decision-making and strategic direction for the alpine sector (for example, through commissioning studies such as the recent ‘Victorian Alpine Resorts Economic Contribution Study’²² and ‘Potential Impacts of Climate Change on Victorian Alpine Resorts’²³ report).
12. **The Department should focus on re-establishing buy-in from key stakeholders, using the development of the new Strategic Plan as a process for engaging ARMBs and key stakeholders** (particularly Traditional Owners and ski lift companies) in a meaningful way.

²² Ernst and Young 2017, ‘Victorian Alpine Resorts Economic Contribution Study’, <<http://www.arcc.vic.gov.au/uploads/publications-and-research/Victorian%20Alpine%20Resorts%20summary%20report%20-%2023062017%20low.pdf>>

²³ Harris, RMB, Remenyi, T and Bindoff, NL 2017, ‘Potential Impacts of Climate Change on Victorian Alpine Resorts’, Antarctic Climate and Ecosystems Cooperative Research Centre, University of Tasmania, <http://www.arcc.vic.gov.au/uploads/publications-and-research/The%20Potential%20Impact%20of%20Climate%20Change%20on%20Victorian%20Alpine%20Resorts%20Study_FINAL.pdf>

Appendix 1—Actions in the 2012 Strategic Plan and Strategic Marketing Plan 2014-2018

Table 8. Actions in the 2012 Strategic Plan and their status at end 2017.²⁴

Action number	Action	Lead agency	Status
Strategic Objective 1: Enhancing the visitor experience and developing resorts			
1	Identify, create and promote a broader range of packages, products and new experiences that strengthen the vibrancy of the alpine resorts and link with surrounding regional towns.	ARMBs, lift companies, private sector	Completed (Short term 0-2 years)
2	Review current industry research to ensure it is contemporary, robust and meets the needs of the alpine industry.	ARCC	Completed (Short term 0-2 years)
3	Undertake research to better understand the changing visitor markets and preferences.	ARCC	Completed (Short term 0-2 years)
4	Encourage visitors from non-traditional markets to experience skiing and snowboarding.	Lift companies (and ARMBs as partners)	Ongoing
5	Grow the green season market, through selected, market- and season-driven strategies that capitalise on individual alpine resort strengths.	ARMBs	Completed (Medium term 3-5 years)
6	Encourage and assist on-mountain businesses to operate outside the snow season.	ARMBs	Ongoing
7	Develop an integrated model for the overall promotion of Victoria's alpine resorts, including a five-year Victorian alpine resort strategic marketing plan that co-ordinates and improves promotion at alpine resort, regional, state and national levels.	ARCC, TV	Completed (Short term 0-2 years)
8	Develop and maintain an alpine resort-specific tourism and marketing strategic plan that is aligned to the Victorian alpine resorts five-year marketing plan.	Lift companies, ARMBs	Completed (Medium term 3-5 years)
9	Investigate developing or expanding a reservations system for all alpine resorts.	ARMBs, RTBs, Local Government	Completed (Medium term 3-5 years)
10	Investigate the establishment of an alpine interpretive centre that could include a permanent venue for the Alpine Museum collection and Indigenous alpine history.	ARMBs, National Alpine Museum of Australia	Completed (Medium term 3-5 years)
11	Foster partnerships with relevant groups to assist in the identification, assessment, and management of sites of significant natural, historic and cultural heritage.	ARMBs	Ongoing
Strategic Objective 2: Delivering resort services and infrastructure efficiently and accountably			

²⁴ ARCC 2016, 'Alpine Resorts Strategic Plan 2012 Implementation Monitoring Report: 2016'; updated advice provided by ARCC at end 2017.

Action number	Action	Lead agency	Status
12	Review service delivery models to ensure they are efficient, effective, reflect the core role as a land manager, do not compete against the private sector unless there is market failure and are in accordance with government guidelines.	ARMBs	Ongoing
13	Develop and maintain long-term asset management and investment plan to an agreed framework.	ARMBs	Completed (Medium term 3-5 years)
14	Review and update performance Key Performance Indicators (KPIs) for key ARMB economic, environmental and social outcome areas, as part of the corporate planning process.	ARCC, ARMBs	Completed (Short term 0-2 years)
15	Ensure performance against cost benchmarks is part of the corporate planning process and is measured, delivered and reported annually.	ARMBs	Ongoing
Strategic Objective 3: Building partnerships			
16	Develop and report on alpine resort-specific stakeholder engagement plans as part of the corporate planning process, including annual reporting back to stakeholders.	ARMBs	In progress (Short term 0-2 years)
17	Build partnerships between ARMBs, lift companies and on-mountain businesses to develop a seamless visitor experience and formally integrate into strategic management plans and corporate plans.	ARMBs	Ongoing
18	Improve partnerships with other land managers and communities to develop cross tenure products and services.	ARMBs	Ongoing
19	Develop resort-specific Traditional Owner engagement plans and provide cultural awareness and sensitivity training.	ARMBs, DELWP	Completed (Medium term 3-5 years)
20	Amend the Act to better recognise the alpine resorts' role in regional development.	DELWP	No longer required (Medium term 3-5 years)
Strategic Objective 4: Respecting the alpine environment			
21	Develop and implement industry and resort-specific climate adaptation plans.	ARCC, ARMBs.	In progress (Medium term 3-5 years)
22	Seek Federal funding support for renewable energy initiatives.	ARMBs, lift companies	Ongoing
23	Review and implement ARMB environmental management plans that are consistent with this plan and other relevant government policies, including threatened species, waste management and pest plants and animals.	ARMBs	Completed (Short term 0-2 years)
24	Develop alpine ecosystems management guidelines and performance measures.	DELWP	No longer required (Ongoing)
25	Provide reliable and safe drinking water year-round, including linking to long-term capital planning.	ARMBs	Ongoing

Action number	Action	Lead agency	Status
26	Implement water conservation and management programs to minimise impact on catchment values, water quality and human health, which is linked to long-term capital planning.	ARMBs	Ongoing
27	Expand public transport options within alpine resorts and to/from adjacent communities.	ARMBs	Completed (Short term 0-2 years)
Strategic Objective 5: Broadening access opportunities			
28	Develop an industry access and equity plan, including measures to ensure provision of affordable accommodation.	ARCC	Completed (Medium term 3-5 years)
29	Incorporate 'universal design principles' into all developments.	ARMBs	Ongoing
30	Update fire and emergency management plans, including clarifying fire roles and responsibilities and the management of people on high fire risk days.	ARMBs	Completed (Short term 0-2 years)
31	Research and manage road safety risks and opportunities to ensure safe access to alpine resorts.	VicRoads	Completed (Short term 0-2 years)
32	Actively engage with the broader regional community to ensure alpine resorts are included in investment related decision making.	ARMBs	Completed (Short term 0-2 years)
33	Investigate mechanisms and establish a criteria whereby any site holders meeting agreed access and equity (A&E) criteria could receive a suitable discount.	ARCC, DELWP	Completed (Short term 0-2 years)
34	Assist relevant site holders with transition to market based rents including workshops and specialist advice.	ARMBs	Completed (Short term 0-2 years)
Strategic Objective 6: Regulatory reform			
35	Prepare a master plan for each alpine resort, including a vision, capital and asset management plans, precinct development plans, fire and emergency management plans and native vegetation provisions, including a rolling 10–20 year timeframe for key assets (e.g. water and roads).	ARMBs	Completed
36	Monitor the Alpine Resorts Leasing Policy 2002 – Implementation Details to ensure consistent application across all alpine resorts.	DELWP	Ongoing
37	Ensure design principles within the Alpine Resorts Planning Scheme responds to the special character and competitive strengths of each alpine resort.	Former Department of Transport, Planning and Local Infrastructure (DTPLI)	Completed (Medium term 3-5 years)
38	Identify and implement the most appropriate option for streamlining the application of the BMO.	DTPLI	Completed (Short term 0-2 years)

Action number	Action	Lead agency	Status
39	Identify and implement the most appropriate option for streamlining native vegetation management within the alpine resorts.	DELWP	Completed (Short term 0-2 years)
40	Prepare a strategic fire management plan for each ARMB, reconciling fire management and native vegetation objectives.	Fire Services Commissioner	Completed (Short term 0-2 years)
41	Update individual resort strategic fire management plan for each ARMB.	ARMBs	Ongoing
Strategic Objective 7: Financial Framework			
42	Implement an agreed alpine resorts financial management framework, including consideration of the tabling of a consolidated financial report for all ARMBs.	DELWP	Completed (Short term 0-2 years)
43	Establish an integrated Victorian Alpine Resorts Development Program (VARDP) of infrastructure priorities for the industry.	ARCC	Completed (Short term 0-2 years)
44	Implement the integrated Victorian Alpine Resorts Development Program of infrastructure priorities for the industry, as a rolling five-year program.	ARCC	Completed (Medium term 3-5 years)
45	Clearly identify and define Community Service Obligations (CSOs), including their calculation, and seek government agreement to the level and nature of future CSO provision that is required.	DELWP	No longer required (Short term 0-2 years)
46	Measure and incorporate relevant CSO costs in corporate plans.	ARMBs	No longer required
47	Actively participate in regional economic development forums.	ARMBs	Ongoing
Strategic Objective 8: Governance framework			
48	Minister to provide annual Statements of Expectations to ARMBs and ARCC.	DELWP	No longer required (Short term 0-2 years)
49	Industry level (tactical) functions will be agreed and implemented.	DELWP	No longer required (Short term 0-2 years)
50	Provide financial reports to DSE, including quarterly financial reports in accordance with legislative and Ministerial requirements.	ARMBs	Completed (Short term 0-2 years)
51	Ensure governance framework within which the ARMBs operate provides rigour and accountability.	DELWP	Completed (Short term 0-2 years)
52	ARMB corporate plan templates to incorporate KPIs in accordance with currently active Ministerial approvals and the current Ministerial Statement of Expectations.	ARMBs	Completed (Short term 0-2 years)
53	Industry performance to be assessed against KPIs.	ARCC	Ongoing
54	ARCC to establish a peak industry group to provide an on-going mechanism for discussion of industry-driven issues.	ARCC	Completed (Short term 0-2 years)
55	Establish an Alpine Resorts inter-departmental committee.	DELWP	No longer required (Short term 0-2 years)
56	Monitor and report on implementation of the Alpine Resorts Strategic Plan 2012.	ARCC	Ongoing

Action number	Action	Lead agency	Status
57	Introduce half-yearly reviews of ARMBs to improve portfolio management.	DELWP	Ongoing
58	ARMBs to review their activities which compete with the private sector to ensure consistency with government policy.	ARMBs	Completed (Short term 0-2 years)

Table 9. Actions in the Strategic Marketing Plan 2014-2018.²⁵

Level	Action	Description	Lead agency	Timeframe
Goal 1				
Strategy 1 – Understand and meet the needs of the existing market				
State	1	Undertake a research program with existing ski, snowboard and snow play visitors in order to understand: <ul style="list-style-type: none"> The size of the different segments within the existing market; and The product offerings that meet the needs of the existing skiing/snowboarding and snow play markets. 	Tourism Victoria (TV), ARCC	Short term (1–2 years)
	2	State-led marketing programs will include the alpine resorts as a key part of Victoria’s product offering.	TV	Ongoing
Regional	3	Utilise market research findings for marketing, product and industry development activities for the alpine resorts. Assist each resort in developing these products and experiences. Focus on pricing sustainability across shoulder seasons.	RTBs	Medium term (3–5 years)
	4	Lead and develop cooperative marketing programs, as required, in both brand and tactical capacity.	RTBs	Ongoing
	5	Develop a proactive communication plan with all partners to manage industry-wide key media messages.	RTBs, ARCC	Ongoing
Resort	6	Work with the RTBs to develop products and experiences that deliver on the needs of the existing markets and are informed by research.	ARMBs, lift companies, Chambers of commerce	Medium term (3–5 years)
	7	Provide market intelligence to the RTB on the uptake of products and the preferences of the existing market.	ARMBs	Ongoing

²⁵ ARCC 2014, ‘Alpine Resorts Strategic Marketing Plan 2014-2018’.

Level	Action	Description	Lead agency	Timeframe
	8	Undertake customer satisfaction surveys, using a consistent across the ARMBs and robust methodology to ensure on-mountain customer service is of a high standard for all visitors. Report back on findings.	ARMBs, lift companies, Chambers of commerce	Ongoing
	9	Use new technologies such as radio frequency identification data to develop products that are well suited to the existing market's needs.	Lift companies	Medium term (3–5 years)
	10	Consolidate marketing efforts at each resort – one resort, one brand.	ARMBs, lift companies, Chambers of commerce	Short term (1–2 years)
	11	Utilise one strong, differentiated brand to communicate the offering of the resort – one brand, one resort.	ARMBs, lift companies, Chambers of commerce	Short term (1–2 years)
	12	Develop snow play products and infrastructure to increase yield and drive repeat visitation.	ARMBs	Short term (1–2 years)
	13	Capitalise on aviation access for short break stays.	ARMBs, lift companies, Chambers of commerce	Ongoing
	14	Work cooperatively with the travel trade industry on packages and tactical marketing campaigns.	ARMBs, lift companies	Ongoing
Strategy 2 – Develop new skiers; transfer snow play visitors to skiing/snowboarding				
State	15	Develop a campaign that promotes and makes it easy to experience skiing and snowboarding (<i>leveraging action item 23</i>)	TV, ARCC	Ongoing
Regional	16	With the alpine resorts, develop lead-in products that transition the existing snow play market to try skiing and snowboarding.	RTBs	Medium term (3–5 years)
Resort	17	Make it easy to transition to skiing and snowboarding and ensure products and packages are matched to this market's requirements.	Lift companies, ARMBs	Medium term (3–5 years)
Strategy 3 – Market to priority growth markets including lapsed skiers; make them reconsider and book a snow holiday				
State	18	Undertake extensive research to better understand priority growth markets, including lapsed skiers and the barriers to their continued participation and motivational factors.	TV, ARCC	Medium term (3–5 years)
	19	Develop a cooperative marketing campaign to raise the profile of snow, to re-engage priority markets and inspire a snow holiday. (<i>Leveraging action item 23</i>)	TV, ARCC	Medium term (3–5 years)
Regional	20	Work with each alpine resort to disseminate and interpret research findings into their activities.	RTBs	Medium term (3–5 years)

Level	Action	Description	Lead agency	Timeframe
Resort	21	Work with the RTB to utilise the research to inform marketing activities and develop products and experiences for lapsed skiers.	ARMBs, lift companies, Chambers of commerce	Medium term (3–5 years)
Goal 2: Grow the winter market				
Strategy 1 – Raise awareness of and preference for a Victorian snow holiday experience				
State	22	Undertake research to understand brand awareness and snow holiday preference, including benchmarking and measuring over five years.	TV, ARCC	Short term (1–2 years)
	23	Develop a Victorian snow proposition that competes with other holiday options, and appeals to the Lifestyle Leader market.	TV, ARCC	Ongoing
	24	Support the delivery of a cooperative snow marketing program.	TV, ARCC	Ongoing
	25	Review campaign results and return on investment to inform the next years' campaign; disseminate results to the alpine industry and key partners annually.	TV, ARCC	Ongoing
	26	Develop a consistent suite of campaign measurement tools that will be used to refine and inform the following years' campaign.	TV, ARCC	Short term (1–2 years)
	27	In partnership with the RTBs, take a leadership role in providing opportunities for each alpine resort to refine and interrogate their brand positioning and product offerings. This will build stronger brands overall.	TV	Short term (1–2 years)
Regional	28	RTBs play a critical role in developing products appropriate for a first-time snow experience market. Working with ARMBs and lift companies the RTBs can develop the experiences that are the heroes of a cooperative marketing program.	TV, RTBs	Ongoing
Strategy 1 – Raise awareness of and preference for a Victorian snow holiday experience (continued)				
Resort	29	Undertake tactical marketing activities to leverage and capitalise on a cooperative marketing campaign.	ARMBs, lift companies, Chambers of commerce	Ongoing
	30	Make the on-mountain experience easier for first timers.	ARMBs, lift companies, Chambers of commerce	Ongoing
	31	Work with the RTB to improve the value proposition by tailoring products and packages appropriate for Lifestyle Leaders, including extending experiences beyond snow play, skiing and snowboarding (food and wine, retail, health and wellness, dining in the snow/igloo experiences).	RTBs, ARMBs, lift companies, Chambers of commerce, ski clubs and lodges (SCL)	Medium term (3–5 years)

Level	Action	Description	Lead agency	Timeframe
	32	SCL to work with RTB to develop commissionable accommodation packages available through third party booking agents.	SCL	Short term (1–2 years)
Strategy 2 – Target international growth markets				
State	33	Work with the Tourism Australia to position snow as one of Australia’s key experiences under the ‘National Landscapes’ and ‘There’s nothing like Australia’ campaigns.	TV	Short term (1–2 years)
	34	Position the snow holiday experience as a viable add-on to Melbourne in key international markets.	TV	Ongoing
	35	Develop and implement annual international marketing program, including tools to measure return on investment.	TV, Tourism North East (TNE), lift companies, ARMBs	Ongoing
	36	In consultation with the International Mentoring Program, assist the alpine resorts (ARMBs and lift companies) in developing product offerings and packages that are tailored to key international markets and visitor travel behaviours and patterns.	TV, TNE, lift companies, ARMBs	Short term (1–2 years)
	37	Leverage aviation access to alpine resorts for key inbound markets.	TV	Medium term (3–5 years)
Resort	38	Work with RTBs to develop and deliver commissionable product offerings that better match the market’s needs.	RTBs, ARMBs, lift companies, SCL	(Ongoing)
	39	Continue to build and foster relationships with travel industry trade partners.	ARMBs, lift companies	(Ongoing)
	40	Establish effective and robust reporting mechanisms that demonstrate return on investment.	ARMBs, lift companies	Short term (1–2 years)
Goal 3: Develop and promote the green season				
Strategy 1 – Product led development for green season experiences				
State	41	Work with Tourism Australia to ensure hero experiences are included within the National Landscapes Program.	TV	Ongoing
Regional	42	With the ARMBs, lead and facilitate the development of green season experiences, including commercial products associated with the Falls to Hotham Alpine Crossing and the International Mountain Biking Association Epic ride at Mt Buller.	ARMBs, RTBs	Short term (1–2 years)
	43	Work collaboratively with the alpine resorts to develop products and experiences that deliver on the individual resort strengths and regional positioning, including the ‘7 Peaks campaign’.	ARMBs, RTBs	Ongoing

Level	Action	Description	Lead agency	Timeframe
Resort	44	Each alpine resort to identify the core green season strength that will differentiate it and has the greatest capacity to grow visitation.	ARMBs, RTBs	Short term (1–2 years)
	45	Work with the RTB to better understand the green season market and identify products and experiences that meet market needs.	ARMBs, RTBs	Short term (1–2 years)
	46	Engage with and assist on and off mountain businesses to operate and develop products for the green season. This includes participation in RTB and product development initiatives.	ARMBs, RTBs	Ongoing
Strategy 2 – Undertake specific green season promotions				
State	47	Leverage state-led marketing programs.	TV	Ongoing
Regional	48	Lead and facilitate coordinated promotions across the alpine region, connecting the resorts and region as a seamless proposition in autumn, summer and spring, including the ‘7 Peaks’ campaign.	RTBs	Ongoing
	49	Develop a consolidated campaign measurement system.	RTBs	Short term (1–2 years)
Resort	50	Undertake a resort-specific green season campaign that is matched to market trends and leverages the region’s positioning.	ARMBs	Ongoing
Goal 4: Collaborate to create a seamless visitor experience				
Strategy 1 – Streamline the visitor journey online and offline				
State	51	Digitally enable cooperative marketing programs to drive increased traffic to all resort channels.	TV, ARCC	Ongoing
	52	Undertake an audit and map the visitor’s path to purchase across all platforms, to visually demonstrate where barriers to purchase exist.	TV, ARCC RTBs, ARMBs	Long term (Year 5 +)
Regional	53	Work with each resort to ensure alpine businesses have online booking capacity and work effectively with offline channels.	RTBs	Ongoing
Resort	54	Deliver sales and marketing programs that drive conversion, including: <ul style="list-style-type: none"> • Talking to existing markets • ‘New Skier’ markets • Victorian snow reporting • Intrastate marketing. 	ARMBs, lift companies, Chambers of commerce	Ongoing
	55	Refine all communication channels to ensure delivery of one brand, one voice including: <ul style="list-style-type: none"> • One website • One social media voice • Effective and cooperative measurement. 	ARMBs, lift companies, Chambers of commerce	Short term (1–2 years)
Strategy 2 – Partnerships and strategic alliances will lead to long-term growth				

Level	Action	Description	Lead agency	Timeframe
State	56	Host a biennial industry conference to increase engagement and information sharing by the industry.	ARCC	Ongoing
	57	Assist the RTBs with industry engagement, communications and alignment and coordinate marketing to deliver growth.	TV, ARCC	Ongoing
	58	Host an annual industry forum on the implementation of the ARSMP, at which partners at a national, state, regional and resort level report back on their activities.	TV, ARCC	Ongoing
	59	Review current industry research programs.	All stakeholders	Short term (1–2 years)
Regional	60	Lead and manage industry liaison for the entire alpine industry, crossing the winter and green seasons, marketing, and product and industry development.	RTBs	Ongoing
Resort	61	Support and utilise the RTB as a conduit to Victorian Government tourism resources, including marketing, product and industry development programs.	ARMBs, lift companies, Chambers of commerce, SCL	Ongoing
	62	Increase on-mountain business participation in marketing, product and industry development initiatives.	ARMBs, lift companies, Chambers of commerce	Ongoing
	63	Play a key role in the implementation of market research programs on behalf of the ARCC, including visitor satisfaction surveys and gate entry research.	ARMBs, lift companies, Chambers of commerce	Ongoing

Appendix 2—Interview data summary

Please note that this is a summary of the views expressed by stakeholders interviewed through the review consultation process. The insights summarised and presented here do not constitute key findings of the review. This data has been synthesised by FPC with the range of other data sources provided to us.

Strategic planning

Overall reflections

What worked well and what didn't work so well

Two-thirds of interviewees made specific comments on successful elements of the Strategic Plan and its implementation:

- Useful for guidance, context and direction, served as a useful reference point and guiding document
- Set objectives for Victoria's alpine sector that were, and are still, relevant for driving the strategic focus for co-ordinated management of the sector as a whole (although it was noted by some stakeholders that this was already the direction of the sector regardless of the Strategic Plan)
- Resulted in more collaboration among stakeholders and an increased willingness to co-ordinate.

However, despite these positive reflections, overall, feedback through interviews was more focused on the unsuccessful or challenging elements of the Strategic Plan and its implementation.

Criticism focused on:

- Issues with accountability, monitoring and reporting—including that the Strategic Plan includes too many individual action items and is too operationally focused, rather than maintaining a high-level 'strategic' focus, and that, overall, there are too many plans, strategies and policies in alpine resorts governance.
- Lack of buy-in, ownership and engagement among the sector on the Strategic Plan and its implementation
- Dissatisfaction with the current governance structure for the management and co-ordination of Victoria's alpine resorts—including concerns with the ARCC.
- Inadequate engagement with Traditional Owners, and reported engagement challenges between ARMBs and Traditional Owner groups.
- Concerns that the Strategic Plan and current governance of Victoria's alpine resorts does not reflect the objectives of Traditional Owner groups to increase economic development opportunities for local Indigenous communities, and increase participation of Indigenous people in economic, social and cultural activities.

- Concerns that the Strategic Plan is not well-integrated with other relevant strategies, plans and policies—including DELWP’s Planning Scheme, Joint Management Plans, Parks Victoria, EMV etc.
- Concerns about lack of support and funding for infrastructure developments and other initiatives—there is a sense among some stakeholders that resources and funding available to support Victoria’s alpine resorts does not adequately reflect the value and contribution of the sector to the wider Victorian community and economy.

Future value of sector-wide strategic co-ordination

Through consultation, the majority of stakeholders reported that they believe there is either “a great deal of value” or “moderate value” in having an overarching strategic plan for the co-ordination of Victoria’s alpine resorts going forward.

However, stakeholders generally followed up with caveats on this, including that future strategic plans must:

- involve an agreed direction within the sector, supported by appropriate consultation processes and genuine buy-in from stakeholders
- align with the governance structure of the sector, taking into account any changes after the outcome of the Governance Reform Project is announced.

Key priorities and recommendations going forward

The key priorities for future co-ordination and management of Victoria’s alpine resorts identified by stakeholders through consultation include:

- **That the alpine sector is appropriately supported with resources and funding, reflective of the value and contribution of the sector to the wider Victorian community and economy.** Funding for future infrastructure was raised in particular as a key priority for stakeholders.
- **Establishing an agreed collaborative strategic direction for the alpine sector, supported by effective consultation to re-establish buy-in and ownership among key stakeholders.** Improving the participation of Traditional Owners in alpine resorts strategic governance and co-ordination was highlighted as an important component of this.
- **Increased representation of Traditional Owners in alpine resorts governance structures,** including membership on ARMBs and the ARCC, and a clearer framework for engagement with and participation of Traditional Owner engagement in social, economic and governance aspects of alpine resorts.
- **Clearly establishing and communicating roles, responsibilities and accountabilities associated with alpine resorts management and co-ordination**—including any necessary changes as a result of the outcome of the Governance Reform Project.

Specifically, stakeholders suggested recommendations and improvements for the next iteration of the Strategic Plan, including:

- **The next plan should include key high-level objectives, but with fewer and less operationally-focused individual actions.** There was a strong sense that the next plan

should clearly articulate strategic priorities for the sector, but be flexible enough to allow each resort to adapt their individual operations in meeting these strategic priorities.

- **Establishing genuine buy-in and commitment to the strategic direction of the sector is crucial**—development and implementation of the next plan should be informed by appropriate stakeholder consultation and engagement processes.
- **Accountability is a key area to be improved in the next plan.** Stakeholders suggested: including fewer but more meaningful KPIs to measure outcomes against each objective, improving monitoring and reporting processes, and revising the plan’s strategic objectives every year.
- **Clearer and more effective integration and alignment with other land management strategies and policies** was also suggested—particularly those of Parks Victoria (including Joint Management Plans and the Alpine National Park Strategy, DELWP’s Planning Scheme, Vic Roads, Tourism Victoria and Emergency Management Victoria, as well as resort-level strategies including Marketing Plans, Master Plans, Corporate Plans).

Strategic sector-wide marketing

Overall reflections

What worked well and what didn’t work so well

Throughout interviews, it was recognised that while alpine resorts each have different markets, individual strengths and product offerings, there are opportunities for collaborative marketing across the sector.

Through interviews, **stakeholders reflected on positive or successful elements of the marketing of Victoria’s alpine resorts**, including:

- A sense that the overarching goals in the Strategic Marketing Plan are relevant for sector-wide marketing, despite concerns raised about the ways that these goals are pursued operationally and strategically.
- Some positive feedback about the Snow Victoria campaign, and some positive reflections on increased alpine resort visitation perceived to be linked to sector-wide marketing approaches.
- A sense that, in many cases, industry stakeholders continue to pursue effective marketing campaigns at various levels across the green and white seasons, including: resort focused, regional level and company based marketing campaigns, as well as collaborative sector-wide campaigns.

However, through interviews, **stakeholders reported dissatisfaction with the delivery model for statewide marketing campaigns for Victoria’s alpine resorts.** This appeared to influence negative stakeholder reflections on marketing across the sector more widely:

- The vast majority of stakeholders were critical of current sector-wide marketing. Interviewees reported that the industry is currently not effectively collaborating on

marketing. In particular, it was noted that there is a lack of buy-in from key stakeholders and poor alignment of marketing approaches across the sector.

- In many cases, marketing was highlighted as a significant area of concern or dissatisfaction among alpine stakeholders when reflecting on the sector more broadly. We note that criticism was predominantly focused on the delivery model for sector-wide co-operative marketing campaigns.
- Stakeholders were particularly critical of the ARCC's direct role in managing and delivering sector-wide marketing campaigns and the Snow Victoria campaign specifically. Interviewees noted that the ARCC's involvement in campaign delivery is inconsistent with the Victorian Government's approach to tourism marketing in other sectors through Visit Victoria and RTBs.
- Stakeholders provided feedback that the current model for sector-wide marketing does not reflect the competitive nature of the alpine industry, but also does not effectively capitalise on the opportunities for shared marketing and collaborative tourism campaigns that exist across alpine resorts.

Future value of sector-wide strategic marketing

There was a strong view among some stakeholders that integrated marketing in the alpine sector does not work and should not be pursued. However, despite raising significant concerns with the current marketing delivery model, the majority of stakeholders support the concept of having a component of collaborative sector-wide marketing.

The majority of stakeholders reported that some form of sector-wide marketing across Victoria's alpine resorts is valuable and should continue to be pursued as a strategic objective.

However, a number of caveats were placed on this support for ongoing collaborative marketing, namely:

- That sector-wide marketing campaigns (such as Snow Victoria) would be more appropriately delivered through an alternative model, with Visit Victoria and RTBs having greater involvement in marketing delivery, and the ARCC having high-level co-ordination and strategic oversight.
- That the focus and approach of any sector-wide marketing campaign is agreed, with buy-in established through appropriate consultation with all key stakeholders—including ARMBs, the ARCC, commercial operators (particularly ski lift companies), RTBs, Visit Victoria, local chambers of commerce and any other relevant organisations. We note that the ARCC currently co-ordinates an industry representative group comprising some of these stakeholders, which agrees to the content and distribution of the current Snow Victoria campaign.

Key priorities going forward and recommendations for new Strategic Marketing Plan

Through stakeholder interviews, the following key priorities for strategic marketing across Victoria’s alpine resorts were identified:

- **Changing the delivery model and funding structure for sector-wide marketing**—that Visit Victoria and RTBs should have a greater role in alpine resorts marketing across both summer and winter seasons. The majority of stakeholders suggested that the ARCC should have a role in high-level co-ordination of strategic marketing, but should not be operationally involved in delivering marketing campaigns. The funding structure for investment in sector-wide tourism campaigns was also suggested by stakeholders to be reviewed.
- Because of the perceived lack of current collaboration and integration of marketing across the sector, **priority should be given to establishing buy-in and ownership** (including among key stakeholders, local communities and Traditional Owner groups) through more effective consultation and collaborative management structures/approaches.
- **Strengthening the evidence base that informs marketing approaches and campaigns** was also suggested through interviews, including undertaking more research to support the direction of sector-wide marketing and establishing consistent measures where possible (particularly for visitation numbers across both the white and green seasons). It was noted that there should be a strong focus on better understanding new and emerging markets for alpine visitation and the opportunities this presents for marketing and product development. We note that this would build on the market research commissioned by the ARCC and made available to all industry stakeholders in 2015.
- Recognising that **while there are clear opportunities for Victoria’s alpine sector to collaborate on marketing, there some areas where competition in the sector may be more appropriate**, including individual resort-based or destination-based marketing.
- In relation to the next iteration of the Strategic Marketing Plan, interviewees suggested that **improving accountability, reporting and monitoring should be a priority**, including having fewer specific actions and fewer but more appropriate KPIs and impact measures.