

Victorian Alpine Resorts

**Summer 2008/09**

**Visitation Survey  
Report**



**Alpine Resorts  
Co-ordinating Council**



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# **VICTORIAN ALPINE RESORTS**

**2008 / 09**

## **SUMMER VISITATION SURVEY REPORT**

**JUNE 2009**

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**Alpine Resorts Co-ordinating Council**

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## CHAIRPERSON'S FOREWORD



This is the Council's second Summer Vehicle Counting Report. While the Black Saturday bushfires had an obvious adverse impact on visitor numbers, it is pleasing to see that total vehicle numbers, and thus total visitor numbers, measured over the entire summer period remained at a high level, with the numbers prior to the bushfires recording a 5.6% increase.

The Victorian Government's Alpine Resort 2020 Strategy espouses a vision of 'four season, vibrant, sustainable resorts'. This vision has been reinforced in the Minister's more recent statement: 'Sustainable Alpine Resorts – A Framework for Discussion' which highlights the importance of repositioning the Resorts as year-round destinations, especially as a strategy to build resilience to climate change.

Accurate reporting of visitor numbers is an important measure of the success of current actions in delivering this four-season vision and Council's summer vehicle count survey is a key element in that reporting.

As determined in this report, some 333,000 people visited the Resorts during the summer survey period. Together with winter visitation, there are now over one million visits being made to the Victorian Alpine Resorts each year.

I would like to especially acknowledge the assistance of each of the Victorian Alpine Resort Management Boards in undertaking the vehicle and visitor counts at their respective Resorts.

A handwritten signature in black ink, appearing to read 'Andrew Fairley'. The signature is fluid and cursive.

**Andrew Fairley**

Chairperson





## 1. BACKGROUND

- 1.1 The Alpine Resorts Co-ordinating Council (the 'Council') is a statutory body established under the *Alpine Resorts (Management) Act 1997*. It reports to the Hon Gavin Jennings MLC, Minister for Environment and Climate Change. It performs a co-ordinating function across Alpine Resorts, focused on: strategic planning, research, attraction of investment and overall promotion of resorts. It also provides advice to the Minister on a wide range of Alpine Resort issues.
- 1.2 Information on visitation to Alpine Resorts, both during the winter season and outside the winter season, is important for a wide range of planning purposes. Ski lift companies, accommodation providers, retailers, suppliers, Alpine Resort Management Boards ('Boards'), as well as various service providers and government agencies, all make use of this information.
- 1.3 Visitation during the winter season has been recorded in a systematic way for many years and is now published by the Council on a regular basis.
- 1.4 Historically, recording of summer visitation to Alpine Resorts has proven to be more challenging. Commencing in 2007/08, Council and Boards conducted a survey of summer vehicle numbers. The survey, with improvements to better estimate the number of visitors, was conducted again during the 2008/09 summer season.
- 1.5 The Government's strategy for Alpine Resorts, the *Alpine Resorts 2020 Strategy*, is based on a vision of '*four season, vibrant, sustainable resorts*'. Consistent measurement of summer visitation is critical to the assessment of the success of actions taken to increase four season use of Alpine Resorts.
- 1.6 The 2008/09 summer survey builds on the consistent methodology and timing developed for the 2007/08 summer survey. It is intended that Council's vehicle counting project will provide baseline data which the Council and Boards will build upon in future years.



## 2. METHODOLOGY

### Vehicle Counts

- 2.1 Since the 2007/08 summer season, automatic counters have been permanently installed on the access roads to each Victorian Alpine Resort. Loops buried in the roads detect passing axles, from which an estimate of vehicles is determined. In some cases the counters have been in place for a period of years and this has enabled some historical information to be presented in this report.
- 2.2 This summer survey has been undertaken from early November until late April, i.e. to cover the period from Melbourne Cup Day until Anzac Day. The survey procedures provided for vehicle count information to be collected by Boards on at least a weekly basis.
- 2.3 The methodologies employed to analyse the results at each Alpine Resort are set out below.
- 2.4 Falls Creek  
The Board has recorded vehicle count information for all inbound lanes and the outbound lane at Howman's Gap entry station since 1994. For the purposes of this report, the vehicle counts of all inbound lanes have been used. The counter was operational for the whole of the survey period.
- 2.5 Lake Mountain  
The Board has a counter at the entry gate that has recorded the number of vehicles entering the resort since 1997. These records have been used for this report. The counter ceased operation following the bushfires on 7 February 2009.
- 2.6 Mount Baw Baw  
The Board has a counter at the entry to the village. Detailed information is available for the 2008/09 summer season, although the Resort was closed to the public during and following the 2009 bushfires. Incomplete historical records are available for some years back to 2000. The counter was operational for the whole of the survey period.
- 2.7 Mount Buller  
The Board has recorded vehicle count information for all inbound lanes and the outbound lane at the Mirimbah entry station since 2001. For the purposes of this report, the vehicle count used is the average of the inbound and outbound counts is used as it is considered to better estimate weekly visitation. The counter was operational for the whole of the survey period.
- 2.8 Mount Hotham  
The Board installed permanent counters on the Great Alpine Road on either side of the village in late 2007. During the survey period 58% of recorded vehicle entries were from the Harrietville direction, with 42% from the Omeo direction. The Great Alpine Road is a well used through road with visitors entering the Resort from both directions, thus the vehicle counts from the inbound lanes of both counters have been summed for this report. As the village straddles the Great Alpine Road and has multiple entry points it is difficult to determine whether visiting vehicles are stopping in, or travelling through, the resort. For the purposes of this report it is assumed that all vehicles counted visited (i.e. stopped at) the Resort. The counters were operational for the whole of the survey period.



## 2.9 Mount Stirling

The Board recorded vehicle count information for the inbound and outbound lanes of the Mount Stirling Road at the Mirimbah entry station. During the survey period 49% of recorded vehicle movements were on the inbound lane of the Mount Stirling Road at the Mirimbah entry station, with 51% on the outbound lane. A significant proportion of vehicles passing through the Resort entry gain access either to or from destinations beyond the Mount Stirling Alpine Resort, i.e. they make one-way journeys through the Resort. For the purposes of this report it has been assumed that 50% of summer vehicles make such one-way journeys and this is the figure that has been recorded in this survey. The counter was operational for the whole of the survey period.

### Visitor Counts

- 2.10 To provide a better estimate of the number of visitors to Resorts, Boards conducted a physical count of the number of visitors per vehicle on a number of selected days during the survey period. The days were chosen to cover a range of school holiday, non school holiday and public holiday periods.
- 2.11 The intention was to record the number of visitors, purpose of visit and origin of visitors for each vehicle that entered the Resort on the selected days.
- 2.12 In the case of moving vehicles on the Great Alpine Road, the Mt Hotham Board was only able to estimate the number of occupants per vehicle, as the Board had no opportunity to stop such vehicles.
- 2.13 Surveys were conducted on a minimum of two occasions by all Boards.



### 3. VEHICLE SURVEY RESULTS –SUMMER SEASON

- 3.1 Summary results for weekly vehicle counts during the period November 2008 – April 2009, for each Alpine Resort and the combined figure for all Resorts, are shown in Table 1.

**Table 1 - 2008/09 Vehicle Count Totals**

	Falls Creek	Lake Mountain	Mt Baw Baw	Mt Buller	Mt Hotham	Mt Stirling	All Resorts
<b>November 2008 - April 2009</b>							
<b>Total Summer Vehicles</b>	36,507	4,209 <sup>1</sup>	12,733	29,964	60,199	11,818	155,431
<b>Average Weekly Vehicles</b>	1,460	324	509	1,199	2,315	473	-
<b>Minimum Weekly Vehicles</b>	840	137	102	432	1,441	108	-
<b>Maximum Weekly Vehicles</b>	2,618	610	1,462	3,080	3,852	1,093	-

<sup>1</sup> No visitation recorded at Lake Mountain subsequent to the February bushfires

- 3.2 During the survey period, a total of 155,000 vehicles were recorded visiting the Resorts.
- 3.3 The figures at Mt Hotham reflect the high volume of through traffic using the Great Alpine Road. To a lesser extent Falls Creek and Mt Stirling also service through traffic.
- 3.4 The survey shows that there is a marked variation in the vehicle counts on a weekly basis during the summer season at all Alpine Resorts. Maximum weekly counts are approximately double the weekly average vehicle counts at most Resorts.
- 3.5 Table 2 compares the 2008/09 summer vehicle counts with the previous summer's results<sup>1</sup>.

**Table 2 - Vehicle Count Change 2007/08 to 2008/09**

	Falls Creek	Lake Mountain	Mt Baw Baw	Mt Buller	Mt Hotham	Mt Stirling	All Resorts
<b>November 2008 - April 2009</b>	36,507	4,209 <sup>1</sup>	12,733	29,964	60,199	11,818	155,431
<b>November 2007 - April 2008</b>	33,550	7,438	12,608	34,505	62,038	12,641	162,781
<b>Percentage Change</b>	8.8%	-43.4%	1.0%	-13.2%	-3.0%	-6.5%	-4.5%

<sup>1</sup> No visitation recorded at Lake Mountain subsequent to the February bushfires

- 3.6 The table shows a small decrease in total vehicles of 4.5% in 2008/09 compared to 2007/08. However, it also shows that the changes have not been uniform, ranging from an increase of 8.8% at Falls Creek to a decrease of 43.4% at Lake Mountain.
- 3.7 Following the devastating bushfire events on 7 February 2009, Lake Mountain, Marysville and surrounding areas were sealed off for some

<sup>1</sup> The total number of vehicles recorded during the 2007/08 summer period was an estimated figure, as the vehicle counters at Mt Hotham were operational for part of the season only. As a consequence the Mt Hotham total was calculated assuming that the proportion of vehicles accessing Mt Hotham during the period when the counters were operating approximated the proportion of vehicles at the other resort combined, over the same period. Analysis of the 2008/09 Mt Hotham vehicle count records suggests that the assumption was valid.



time and remained closed to the public until the end of April. In essence summer visitation ceased on 7 February. In addition, as a result of the bushfires, the Lake Mountain vehicle counters were rendered inoperable.

- 3.8 The bushfires continued throughout February and into March and affected much of the high country, particularly the areas surrounding or near Lake Mountain, Mt Baw Baw, Mt Buller and Mt Stirling. Many of the national parks, state forests and other public lands were closed or had restricted access. At times Mt Baw Baw was directly threatened and was closed to the public for approximately two months. A better comparison of changes in vehicle numbers results from using data for November to February, a period that was unaffected by fires.
- 3.9 Table 3 shows vehicle counts for the period November to February for both 2007/08 and 2008/09. It shows that with the exception of Mt Stirling, all Alpine Resorts recorded an increase in summer vehicles prior to the bushfires, with Mt Baw Baw and Falls Creek recording the greatest increases (23.4% and 12.7% respectively).

**Table 3 - Change 2007/08 to 2008/09 Vehicle Counts - Prior to February Bushfires**

	Falls Creek	Lake Mountain	Mt Baw Baw	Mt Buller	Mt Hotham	Mt Stirling	All Resorts
November 2008 - February 2009	19,452	4,209	6,348	16,595	30,647	6,851	84,104
November 2007 - February 2008	17,257	4,030	5,143	15,622	30,449	7,106	79,609
Percentage Change	12.7%	4.4%	23.4%	6.2%	0.6%	-3.6%	5.6%

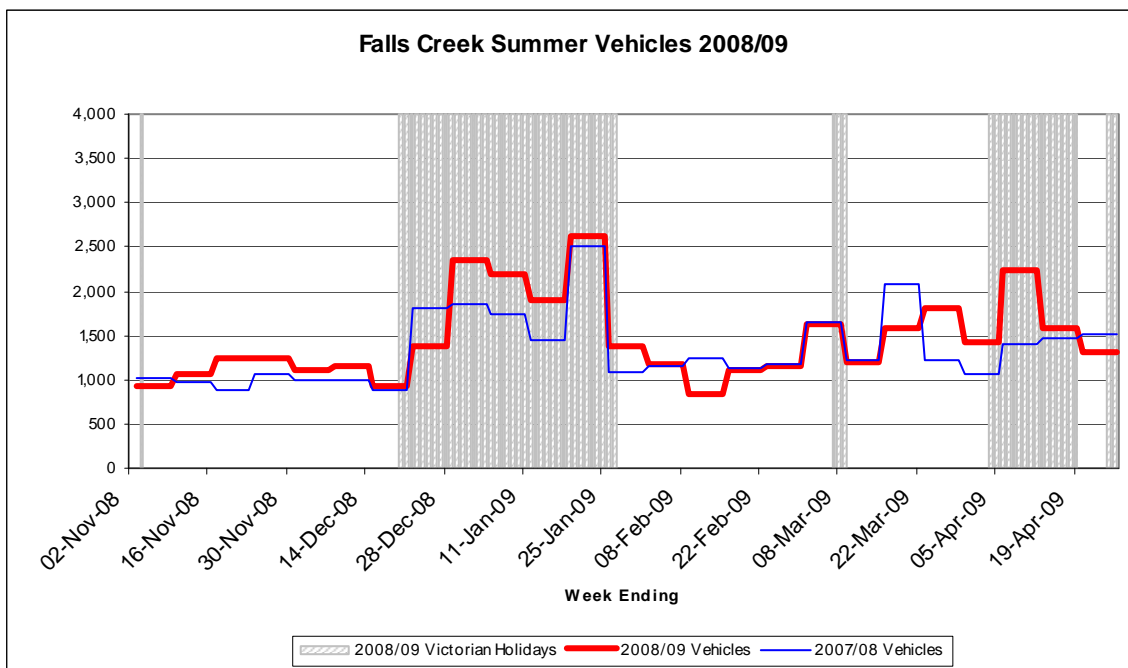
- 3.10 Comparison of the results shown in Tables 2 and 3 suggests that an increase in summer visitation is underway, although the existence or threat of bushfires, either at Alpine Resorts or nearby, adversely impacts on visitation to Alpine Resorts.



#### 4. VEHICLE SURVEY RESULTS – WEEKLY NUMBERS

- 4.1 Figures 1 to 6, below, show weekly vehicle numbers to the six Victorian Alpine Resorts during the survey period. For comparison, weekly results from the 2007/98 survey period are also shown. Figure 7 shows aggregated vehicle counts for the six Alpine Resorts. Victorian school and public holidays for 2008/09 are also shown shaded on the figures and events conducted at Alpine Resorts in 2008/09 are listed below each figure.
- 4.2 As was evident in last year's survey, there is a strong correlation between vehicle numbers, holiday periods and on-mountain events. For most Resorts, peak vehicle counts appear to coincide with school holidays and/or long weekends; traditional holiday times in which Victorians travel. There are significant increases in the number of vehicles during Christmas / New Year, Australia Day, Labour Day and Easter periods. The staging of major on-mountain events coincident with those key holiday times results in an additional increase in recorded vehicle numbers.

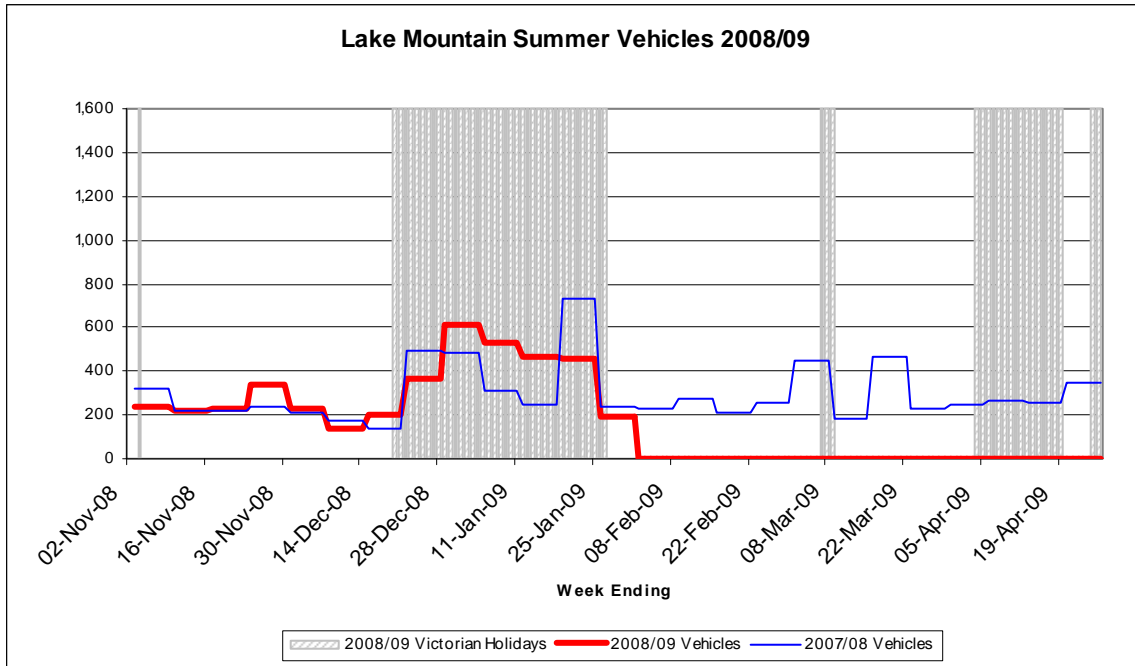
Figure 1



Events: Mile High Cricket – Boxing Day; Big Fella Festival – New Year; Billy Cart Derby & Bush Bash – 10 January; Taste of Falls Creek – 16-18 January; Dragon Boat Races, Audax Cycling Classic - Australia Day; Artists' Camp – Labour Day; MTB Epic – 28 - 29 March; Family Carnival - Easter.



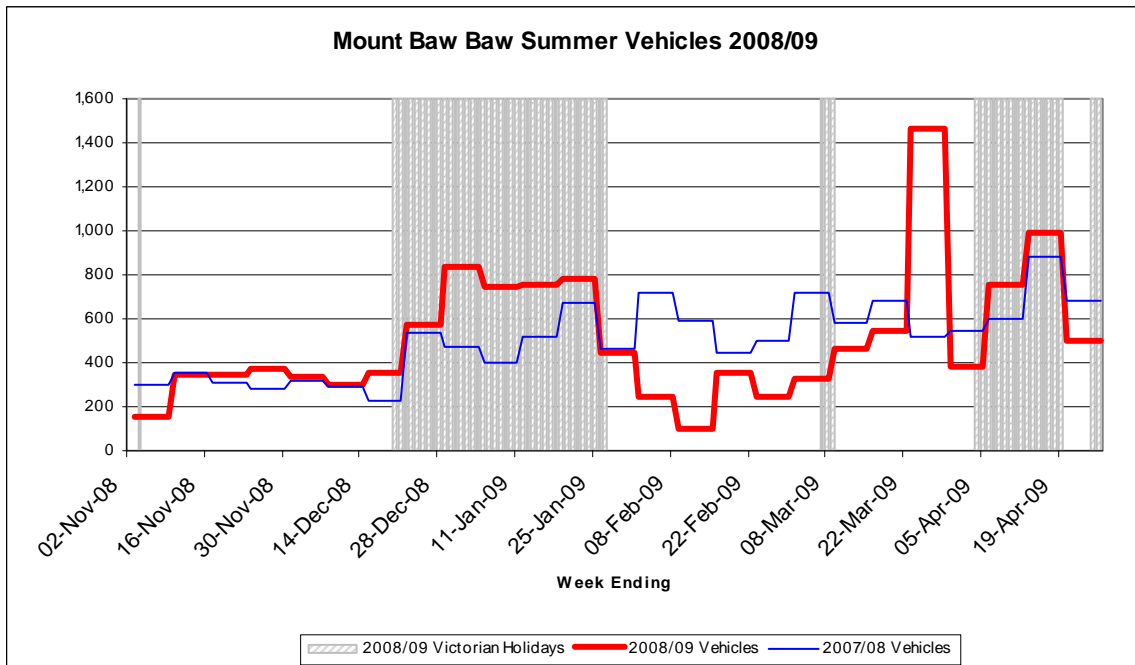
Figure 2



Events: None held during the survey period.

Note: As a result of the February bushfires there were no vehicle counts recorded for the balance of the survey period.

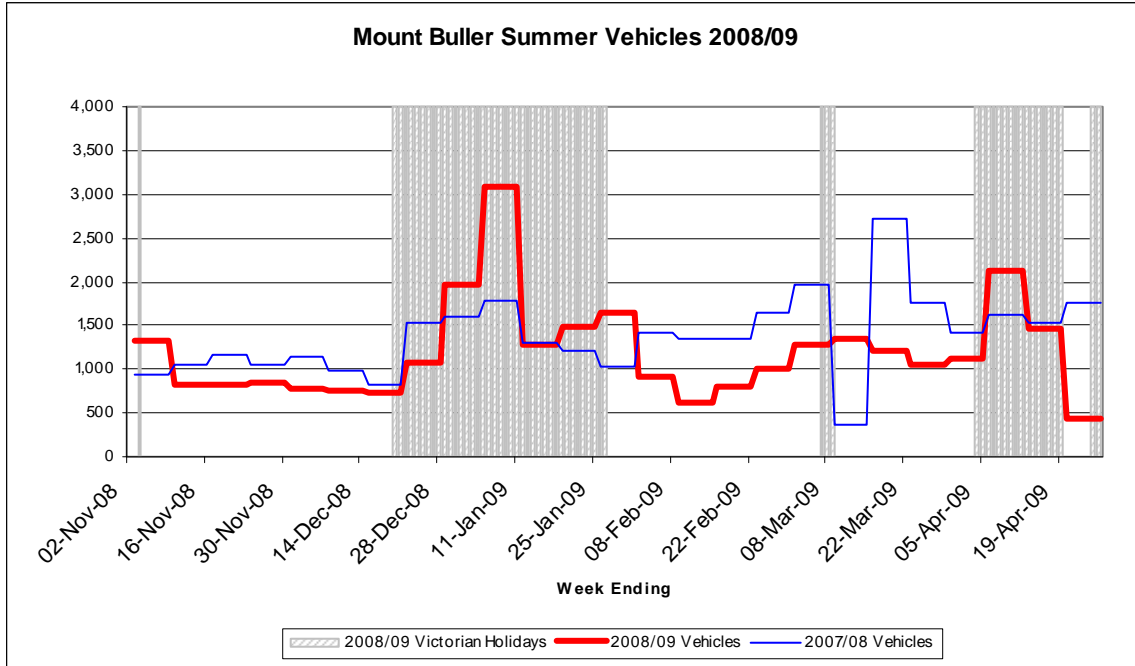
Figure 3



Events: Art Exhibition – Christmas - New Year; Down to Earth Festival - Australia Day; Official Mountain Re-opening – 28 - 29 March; Easter Festival; Cycle Classic – 18 - 19 April.



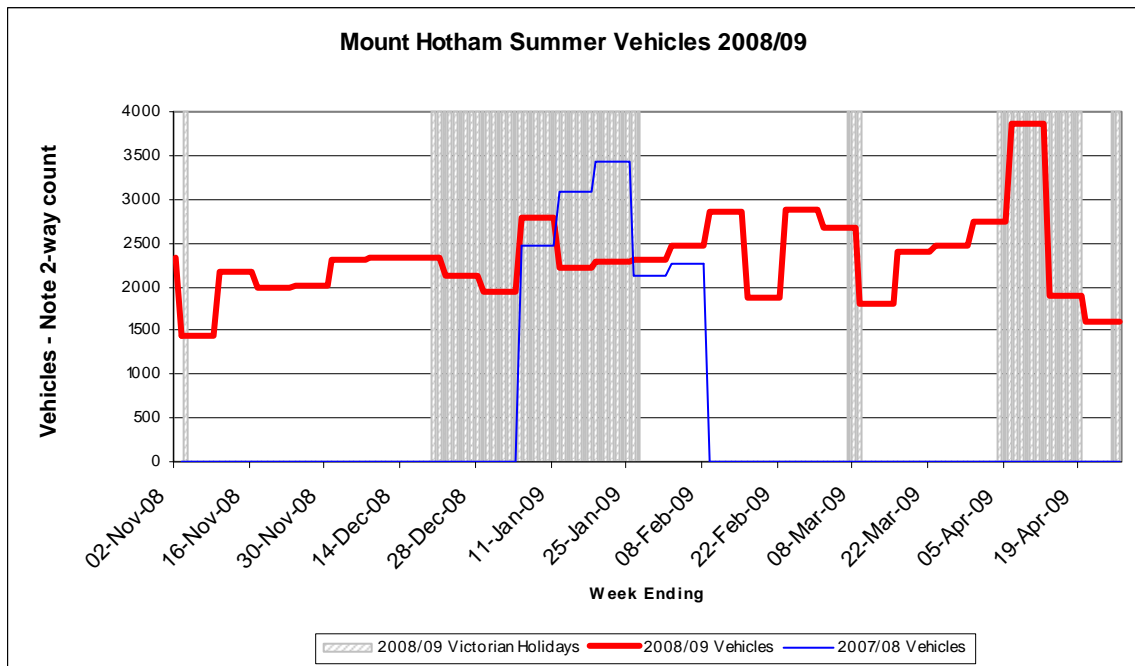
Figure 4



Events: Buller Sprint – Melbourne Cup; All Tomorrow’s Parties Music Festival – 9 -11 January; National MTB Downhill Series – Australia Day; Buller Beerfest – 31 January; High Country Cycle Challenge – 28 February - 1 March; Mirimbah Picnic- Labour Day; Bike Buller MTB – 14 - 15 March; Artists’ workshops, exhibition and prize, Mountain Festival – Easter.

Note: Due to an anomaly in the reading day for the week ending 9 March 2008 (shown in blue), that week’s vehicle count is high and the following week’s vehicle count is low. The total figure is unaffected.

Figure 5

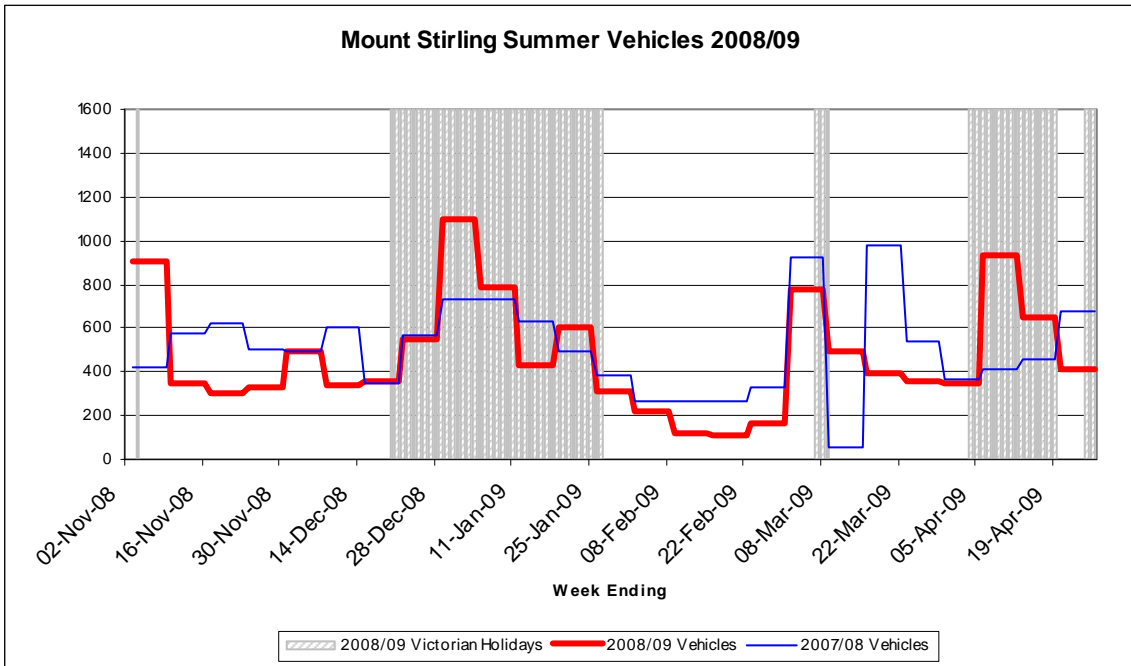


Events: MH/DP Cool Summer Festival - 27 February - 1 March; DP Festival of Cycling; Beyond Hotham 4WD Expo – 3-7 April; MH/DP Cobungra Polo – Easter Festival.

Note: Zero readings in 2007/08 (shown in blue) correspond to weeks during the survey period when counters were inoperable.



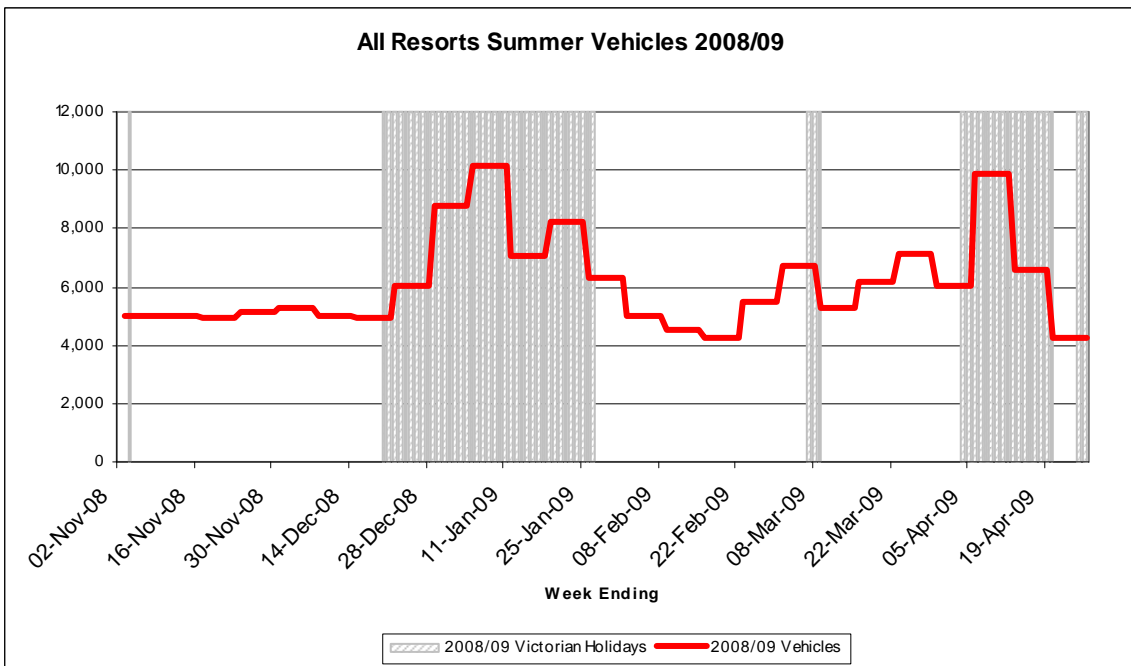
Figure 6



Events: None held during the survey period.

Note: Due to an anomaly in the reading day for the week ending 9 March 2008 (shown in blue), that week's vehicle count is high and the following week's vehicle count is low. The total figure is unaffected.

Figure 7

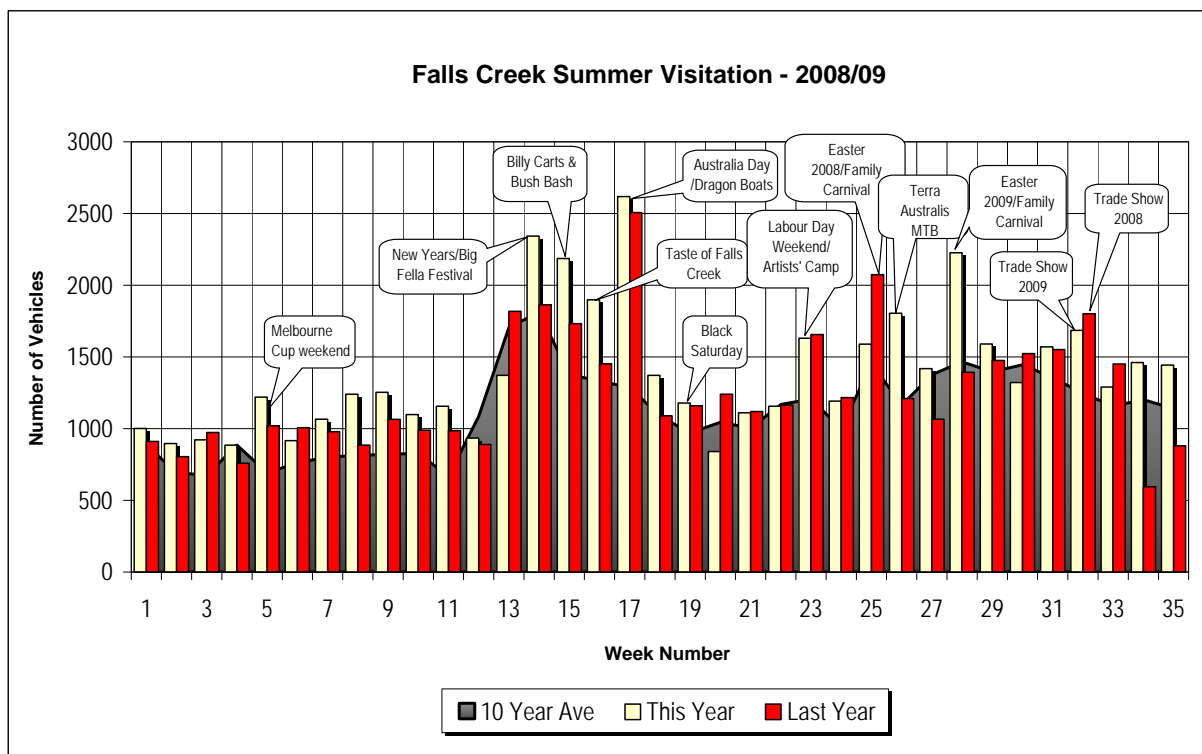


Note: Weekly vehicles not shown for 2007/08 as annual weekly comparisons are not reliable given: that the Mt Hotham counters were inoperable for most of the 2007/08 survey period; and, the impact of the 2009 bushfires.



- 4.3 In the case of Mt Stirling, the strong correlation between vehicle numbers and holiday/long weekends is very evident. As there are no formal 'events', the ability to enjoy the ready vehicular accessibility to, and natural attractions of, Mt Stirling and its surrounding environment are the likely drivers of such visitation.
- 4.4 In the case of Mt Hotham, the close proximity of Dinner Plain means that many of the events on the summer calendar are staged jointly with Dinner Plain, to the benefit of both places.
- 4.5 The severe impact of bushfires on visits is clearly shown in Figure 2 (Lake Mountain) and Figure 3 (Mt Baw Baw), although visitation to Mt Baw Baw recovered well when the Resort was re-opened in late March. Subsequent to the survey period, both Lake Mountain and Mt Baw Baw staged successful summer events.
- 4.6 Summer visitation is also affected by the level of construction activity taking place at Resorts. As an example, reduced construction activity at Mt Buller in 2008/09 has had an impact on vehicle numbers.
- 4.7 Figure 8, below, shows that at Falls Creek there has been an increase in total summer visitation in the last two years (during which time there has been an increased focus on improving the events calendar) compared to the ten-year average.

Figure 8



Source: Falls Creek Board



## 5. HISTORICAL VEHICLE COUNTS

- 5.1 Historical information on visitation to Alpine Resorts outside of the winter season can be difficult to obtain. Such data as exists principally relates to vehicle counts and was often collected by VicRoads and local government for road planning purposes rather than visitation. The timing and duration of counts varies. Parks Victoria and tourism bodies also have some records on summer visitation. Because of the disparate nature of summer visitation data, past studies of the economic significance of Alpine Resorts have used those data records with caution in determining visitation and the economic significance of that visitation.
- 5.2 The results of historical vehicle counts at Falls Creek, Lake Mountain, Mount Baw Baw and Mount Buller Alpine Resorts, taken outside the winter season, are shown in Figures 9 to 12 below. It should be noted that in the case of Falls Creek, Lake Mountain and Mount Buller Alpine Resorts these figures relate to the whole of the year outside the winter season, i.e. October to June. In the case of Mount Baw Baw the figures related to the period November to May. In all cases the non-winter figures differ from the results of this survey, which presents results for the 'summer' period, i.e. November to April.
- 5.3 Records are not available for all years. Records are incomplete in some cases and thus have not been plotted in the figures below. In addition, results for the major bushfire years of 2003, 2006/07 and 2008/09 are lower than may otherwise have been the case, as a result of the closure of many roads and much of the high country during those bushfires (see Section 3 above).
- 5.4 Notwithstanding the above, historic visitation records suggest that modest increases in visitation are occurring over time, with dramatic increases recorded at Mt Baw Baw.

Figure 9

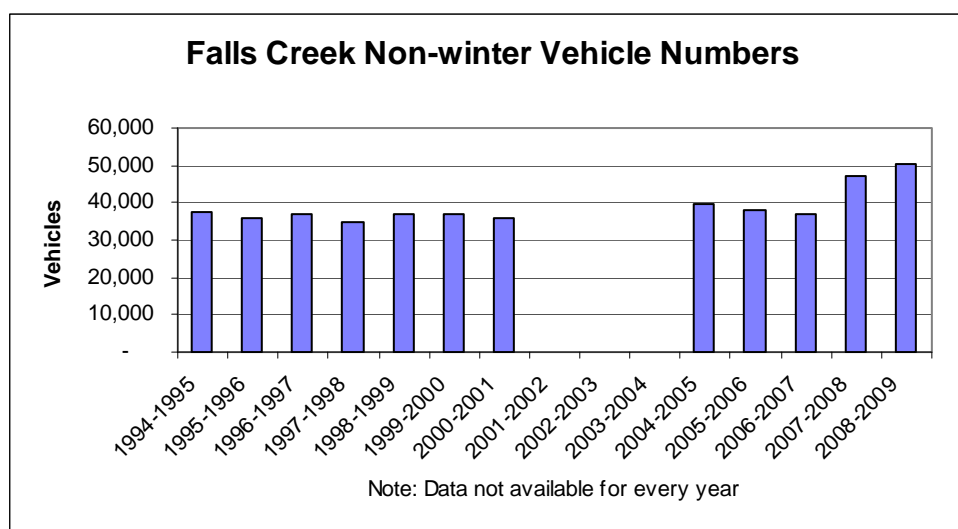


Figure 10

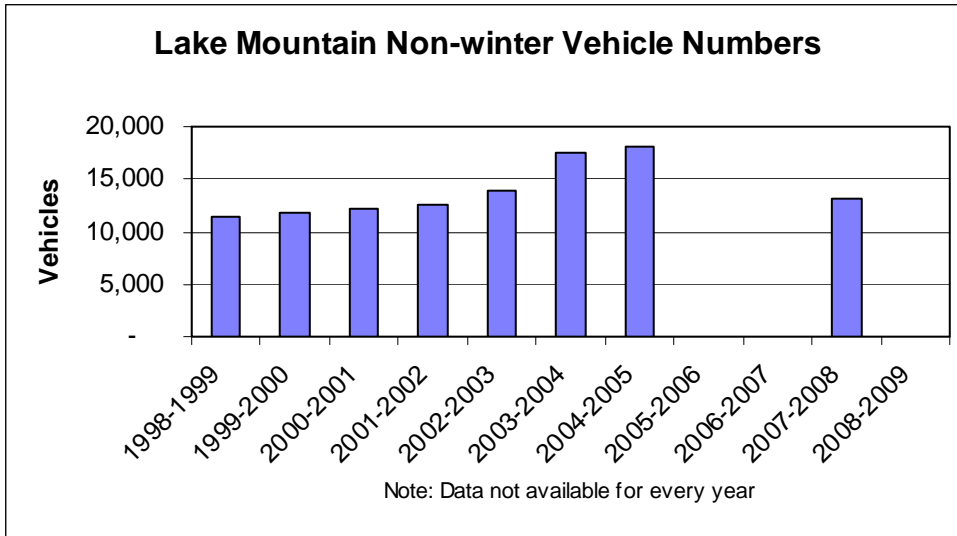


Figure 11

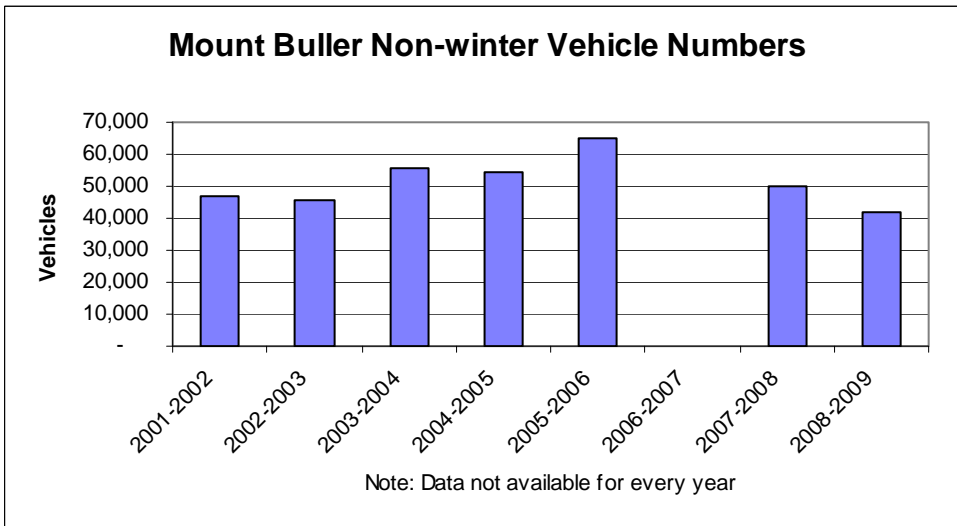
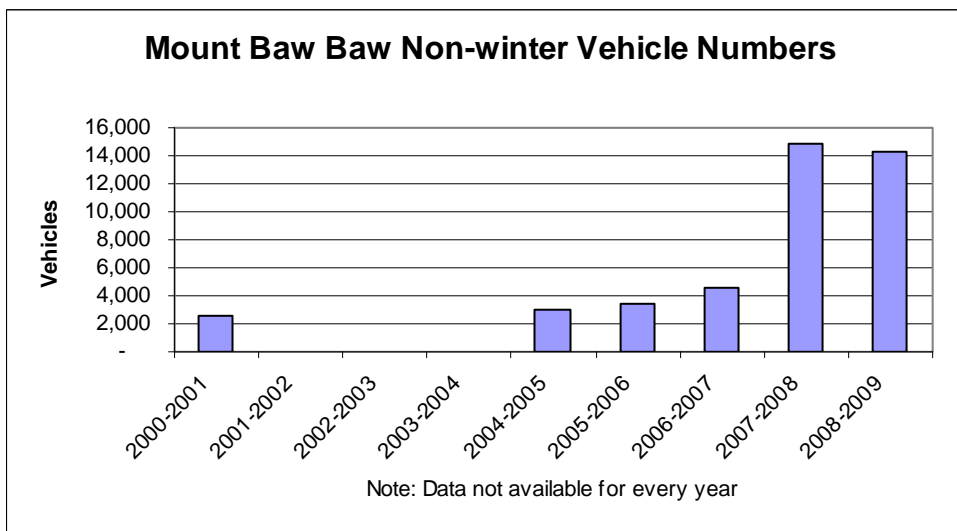


Figure 12



## 6. VISITOR COUNT RESULTS

- 6.1 The first summer vehicle counting survey conducted in 2007/08 did not collect data on vehicle occupancy and thus had to rely on multipliers used in a range of past reports to estimate visitation. To provide a better estimate of the number of visitors to Resorts for the 2008/09 survey, Boards conducted physical counts of the number of occupants per vehicle on two or more occasions during the survey period. The selected dates for those physical counts were designed to cover a range of school and public holiday, weekend and weekday periods. Except in the case of Lake Mountain, Boards also recorded the reason for the visit. In total Boards collected information in respect of over 2,500 vehicles.
- 6.2 Aggregated results for all Victorian Alpine Resorts are shown in Table 4, below.

**Table 4 - Visitor Characteristics – Aggregated Results**

All Resorts	Weekends/ Holidays	Week days	All Days
No. of Vehicles	79,483	75,950	155,433
	2.5	1.8	2.1
Total Visitors	196,735	135,848	332,582

Note: The 'occupancy' figure obtained from the selected days physical counts has been applied to the full survey period vehicle count to calculate the number of 'total visitors'.

- 6.3 Based on the physical visitor counts it is estimated that total visitation to the Victorian Alpine Resorts over the summer survey period (November 2008 – April 2009) is approximately 333,000 visitors, with approximately 60% of total visitation occurring either on weekends or during holiday periods.
- 6.4 As a comparison, if the more accurate occupancy figures determined from the 2008/09 survey were applied to the 2007/08 vehicle counting survey results, the revised number of visitors during the 2007/08 summer survey period is estimated to have been approximately 338,000 (c.f. 400,000 estimated in the published 2007/08 report).
- 6.5 Results for individual Victorian Alpine Resorts are shown in Table 5, below.



**Table 5 - Visitor Characteristics – Individual Alpine Resorts**

Falls Creek	Weekends/ Holidays	Week days	All Days
No. of Vehicles	18,668	17,839	36,507
Occupancy	2.6	2.3	2.4
Total Visitors	48,304	40,732	89,035
Proportion of Staff/Contractor Vehicles	10%	48%	28%

Lake Mountain	Weekends/ Holidays	Week days	All Days
No. of Vehicles	2,152	2,057	4,209
Occupancy	2.7	1.6	2.2
Total Visitors	5,761	3,344	9,105
Proportion of Staff/Contractor Vehicles	n.a.	n.a.	n.a.

Mt Baw Baw	Weekends/ Holidays	Week days	All Days
No. of Vehicles	6,511	6,222	12,733
Occupancy	2.8	1.6	2.2
Total Visitors	18,305	10,116	28,421
Proportion of Staff/Contractor Vehicles	5%	n.a.	n.a.

Mt Buller	Weekends/ Holidays	Week days	All Days
No. of Vehicles	15,323	14,642	29,964
Occupancy	2.8	1.8	2.3
Total Visitors	42,544	26,090	68,635
Proportion of Staff/Contractor Vehicles	4%	35%	19%

Mt Hotham	Weekends/ Holidays	Week days	All Days
No. of Vehicles	30,784	29,415	60,199
Occupancy	2.1	1.5	1.8
Total Visitors	64,612	44,306	108,917
Proportion of Staff/Contractor Vehicles	4%	12%	8%

Mt Stirling	Weekends/ Holidays	Week days	All Days
No. of Vehicles	6,043	5,775	11,818
Occupancy	2.8	2.0	2.4
Total Visitors	17,209	11,260	28,469
Proportion of Staff/Contractor Vehicles	n.a.	n.a.	n.a.

Note: The 'occupancy' figure obtained from the selected days physical counts has been applied to the full survey period vehicle count to calculate the number of 'total visitors'.

- 6.6 Detailed analysis of Table 5, above, shows that there is a distinct difference in visitation characteristics between Weekend/Holiday and Weekday periods, with vehicle occupancy varying between 2.6 – 2.8 for weekend/holiday periods and 1.4 – 2.3 for weekdays. For the purposes of extrapolating visitor numbers the average occupancies for weekend/holiday periods and weekdays were applied on a resort-by-resort basis, except in the case of Lake Mountain and Mt Baw Baw, where no weekday counts took place and the average vehicle occupancies recorded at the other Resorts were applied.
- 6.7 From the surveys it was also possible, in most cases, to determine the reasons for visits. Table 5 shows that for Falls Creek, Mt Buller and Mt Hotham, the proportions of staff/contractor vehicles entering the resort vary from 4 – 10% on weekends/holidays to 12 – 48% during weekdays.



This could be expected as staff/contractors are most likely to visit for work-related purposes on weekdays, whereas, people visiting for recreation and other purposes are considered more likely to visit during weekend/holiday periods.

- 6.8 The survey data also shows that the number of vehicles passing through Resorts varied considerably, with large numbers recorded at Mt Hotham in particular. This is likely to be a result of the important role the Great Alpine Road plays as a link between north-eastern Victoria and Gippsland. Now that the sealing of the Bogong High Plains Road is complete, it could be expected that Falls Creek may see additional summer visitation using that newly-sealed through route.
- 6.9 If an allowance is made for visitation during the months of October and May (i.e. the months between Council's winter and summer surveys), it is estimated that total annual visitation to Victorian Alpine Resorts is in excess of one million visitors<sup>2</sup>.

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<sup>2</sup>The current summer survey methodology enables an estimation of 'visitors' to be made. Length of stay cannot be determined and thus 'visitor days', generally considered a better reflection of the level of activity (and able to be measured for winter visitation), cannot be calculated for the full year – but would be a significantly higher number.







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