

DRAFT  
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# VICTORIA'S TRAILS STRATEGY 2013–23

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## EXECUTIVE SUMMARY

The State of Victoria has a labyrinth of natural beauty where tracks and trails hold the key to spectacular rainforests, pristine beaches and unique attractions.

Visitors are provided with a myriad of options that rival anywhere else in the world, from leisurely strolls through bushland brimming with native wildlife to strenuous treks along sweeping coastal terrain.

The trails range from short recreational loops to long distance paths that can take several days to traverse, either way visitors are rewarded with spectacular mountains, rivers, valleys, waterfalls and indigenous landmarks.

The environment is enjoyed in a variety of ways from sight-seeing, bird watching, photography and meditation to high-energy pursuits including hiking, running and bike-riding. Trails have broad appeal with domestic and international tourists seeking out nature based adventures.

The magnificent diversity of Victoria's landscapes, coupled with sustained investment in trail infrastructure over many decades, provides an ideal platform from which to build a stronger and more viable trail sector.

A strategic approach is needed to managing Victoria's tracks and trails to develop the economic and social potential while protecting and securing our natural assets for future generations.

### **Investment ready**

Victoria's scenic trails present exciting opportunities for domestic and international tourism, giving rise to business development and job creation in the surrounding regions.

The physical and mental health benefits of using trails also supports the campaigns of various government departments and health organisations to improve the wellbeing of our country's population. Thus reducing the social and economic costs associated with poor health.

To successfully tap into the fiscal, social and environmental benefits presented by Victoria trails, the existing network requires upgrading to meet the needs and expectations of visitors. This includes reviewing and upgrading trails' condition, access, amenities, signage and facilities.

Investment in the ongoing maintenance of trails is vital to ensuring the visitor experience is favourable.

### **Long term strategy**

For Victoria's trails to achieve their potential economic, business development and recreational benefits, an interagency approach is required to research, plan, implement, maintain, promote and evaluate the long-term strategy.

Such an approach ensures that perspectives of the various key players whose involvement is crucial to the success of the trails strategy are embedded in the planning and roll-out of the priority initiatives.

This document also identifies the 'gaps' in our current understanding and servicing of the trail-user markets.

The over-riding objectives are to:

- improve the quality of trail experiences in Victoria,
- increase awareness and visitation to Victorian trails,
- develop complementary tourism experiences and activities to entice visitation to Victoria's trails and generate economic and social benefits, and
- seek improved understanding of the trail-user market and their motivations and influences.

## Growing demand

One of the challenges facing the trail tourism sector is a lack of existing research that specifically analyses the usage patterns and demographics of trail visitors.

Available market profiling data compiled by Tourism Victoria regarding nature-based and adventure tourism captures visitors' participation in bushwalks, rainforest walks and other outdoor activities (which are comparative to trail tourism). The data provides some useful insights and confirmation of growing demand for such nature-based experiences from intrastate, interstate and overseas travellers.

According to Tourism Victoria's most recent *Nature-based Tourism Market Profile for the year ending June 2012*<sup>1</sup>, the State hosted almost 1.2 million international overnight nature-based tourism visitors. This represents 68% of all international overnight travellers.

For the same period, Victoria received almost 3.1 million domestic overnight nature-based visitors.

Intrastate visitors were the key market for the nature-based segment, accounting for 75% of the total domestic overnight visitors in this category.

The State's visitation from both domestic and international nature-based tourists had increased on the previous year by 4.9% and 3.9% respectively.

In relation to the types of outdoor activities undertaken by the nature-based visitors:

- 68% of *international* overnight guests visited a National or State park and 36% went bushwalking or for a rainforest walk
- 44% of *domestic* overnight guests visited a National or State park and 50% went bushwalking or for a rainforest walk.

The available research demonstrates that trail tourism has strong potential to deliver tourism growth for regional Victoria and stimulate regional economies.

## Strategic directions

The purpose of this strategy is to provide a whole-of-government approach and clear vision regarding the planning, management and promotion of trails in Victoria.

The vision is for Victoria to be recognised as a major trail-based destination that provides a diverse range of quality trail experiences for visitors, while strengthening the State's economy and improving the health, wellbeing and lifestyle of the community.

To achieve this vision, the strategy focuses on providing:

- a strategic framework for investment into trails that will generate increased economic and social benefit,
- the tools to support stakeholders plan, develop, maintain, promote and market trails,
- trail users with high quality information on trails via a central website (and associated online tools) to both plan and book their trip,
- support to tourism and/or retail businesses create better trail experiences, and
- effective marketing of trails to increase awareness and visitation.

## Action plans

The strategy will be accompanied by a series of action plans. The first action plan will cover a three-year period and will be developed within three months of the release of the strategy.

The action plans will set out priority actions to achieve the objectives outlined in this strategy and will be aligned with the key strategic directions.

Successive action plans will build on the completed work of previous plans and respond to emerging needs and changing trends. Performance measures and targets will be included in the action plans.

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<sup>1</sup> Tourism Victoria (2012), *Nature-based Tourism Market Profile for the year ending June 2012*, <http://www.tourism.vic.gov.au/research>

Some actions will be allocated to individual agencies, while responsibility for others may be shared between organisations.

**Return on investment**

The financial contribution needed to bring Victoria's trails up to the required standard and establish information and marketing activities as well as provide ongoing maintenance is relatively modest when compared with potential economic benefits to the State.

## INTRODUCTION

### Maximising potential of Victoria's beautiful trails

Peaceful bushwalking tracks, challenging mountain-bike routes and horse-riding trails along historic rail routes - Victoria's trails offer an abundance of opportunities to explore and enjoy the great outdoors.

Our trails also signify an exciting opportunity for the State Government to facilitate significant economic, business, employment and tourism growth. Furthermore, they present enormous social, recreational, health and wellbeing benefits and, in turn, significant cost-savings to the community.

To reap such benefits, a moderate level of investment is needed to develop new, and improve the existing, trails infrastructure and address deficiencies to ensure a high quality experience by tourists and local residents.

The magnificent diversity of Victoria's landscapes, coupled with sustained investment in trail infrastructure over many decades, provides an ideal platform from which to build a stronger and more viable trail sector.

Trails are an important component of nature-based experiences in regional Victoria and support community recreation and wellbeing. Through investment to improve the quality of trail experiences – from a tourism and leisure perspective – and developing associated products and services, the State has a lucrative opportunity to grow regional economies and create jobs, while also delivering social and health value for local communities.

Historically, developing a trail network entailed only *building* the trails. Today, consumers are more discerning and have higher expectations about their visitor experience. Future trail planning needs to encompass building of new trails as well as upgrading the existing trail networks, including improving infrastructure and services, increasing awareness of trails and improving consumer access to information and associated marketing activities.

### Trail definition

A trail is an established path, route or track that passes through natural areas and can be used for non-motorised recreation, such as walking, cycling, mountain-biking and horse-riding.

The terrain, composition and use of trails is varied – they can comprise land and water; be short or long distance; urban or regional settings; used for commuting, exercise and leisure; and, in some cases, they can be tourism attractions in their own right.

This strategy will focus on regional terrestrial (land surface) trails for single-use (walking, cycling or mountain-biking) and shared-use (any combination of walking, bike-riding or horse-riding).

### What's on offer in Victoria

Victoria's trail network of 2,000-plus trails has a total length of approximately 8,000 kilometres, including shared-use trails in both urban and regional locations.<sup>2</sup> Victoria's compact size means there are trail-based experiences in each of the State's picturesque regions, with close proximity to town centres and villages.

The Victorian Government manages 85% of the State's trails, many of which are in protected areas in regional Victoria, such as National parks, State parks, State forests and reserves.<sup>3</sup> These trails predominantly cater for walking, with a limited number of shared-use trails and designated mountain-biking and horse-riding trails.

Parks Victoria manages 4,000 kilometres – equating to approximately half of the total trail length - of recreational trails; the Department of Environment and Primary Industries manages 2,800 kilometres or 35% of the network; and local government (including committees of management) manage 1,200 kilometres or 15% of the network.<sup>4</sup>

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<sup>2</sup> State of Victoria, Parks Victoria (2004), *Victorian Trails Strategy 2005-2010*

<sup>3</sup> Ibid.

<sup>4</sup> Ibid.

Of the 1,200 kilometres of trails managed by local government (including committees of management), some 800 kilometres are rail trails.<sup>5</sup> Victoria is recognised for its range of rail trails that provide opportunities for walking, cycling and horse-riding. Sections in close proximity to towns and cities often form part of regular fitness circuits used by local residents, and some, such as the Murray to Mountains Rail Trail, are significant tourism attractions.

In the urban setting, there is an established network of shared-use cycling and walking trails across Melbourne. This network provides opportunities for visitors to walk and cycle around the metropolitan area and supports transport, recreational and sporting activities for city residents. The Principle Bicycle Network, managed by VicRoads, is the primary planning tool for development of metropolitan cycling paths.

## Objectives

The purpose of this strategy is to provide a whole-of-government approach and clear vision regarding the planning, management and promotion of trails in Victoria.

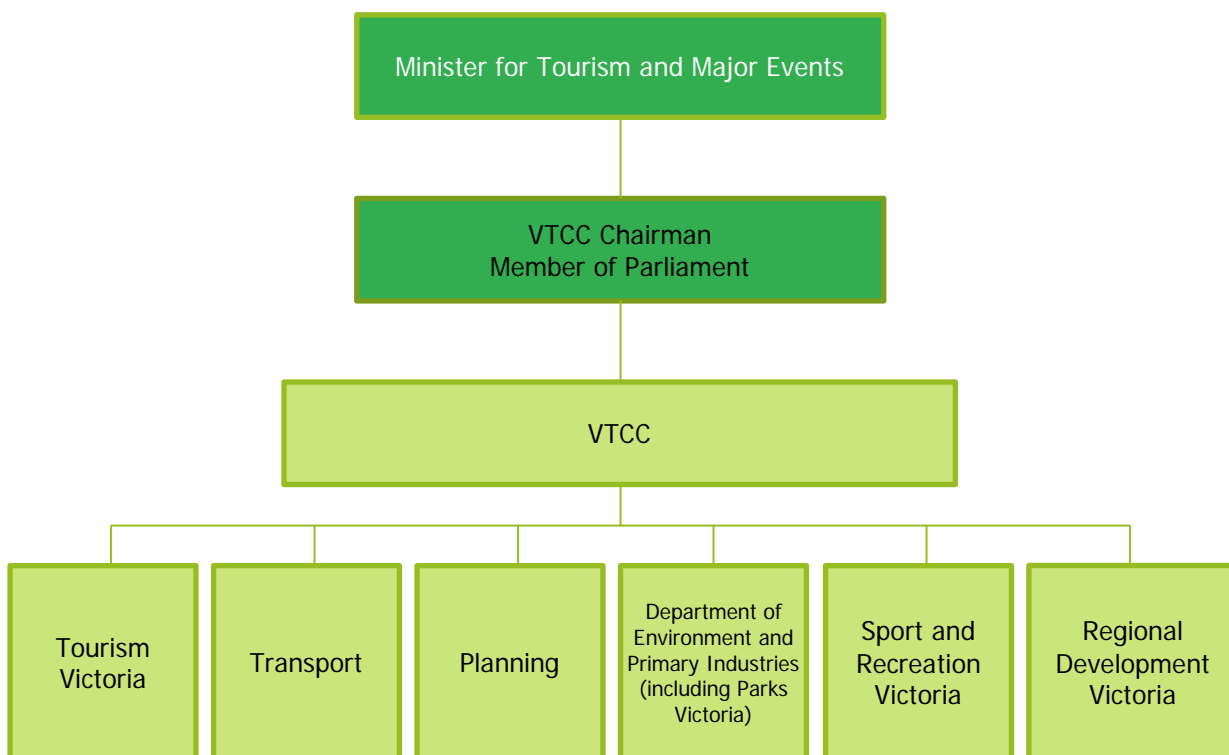
The vision is for Victoria to be recognised as a major trail-based destination that provides a diverse range of quality trail experiences for visitors, while strengthening the State's economy and improving the health, wellbeing and lifestyle of the community.

To achieve this vision, the over-riding objectives of this strategy are to present a set of key initiatives to:

- improve the quality of trail experiences in Victoria,
- increase awareness and visitation to Victorian trails,
- develop complementary tourism experiences and activities to entice visitation to Victoria's trails and generate economic and social benefits, and
- seek improved understanding of the trail-user market and their motivations and influences.

## Policy context

The Victorian Trails Coordinating Committee (VTCC) has overseen the development of this strategy. The diagram below shows the key parties involved in the Committee and strategy development.



<sup>5</sup> Railtrails Australia Inc (2007), *Rail Trails of Victoria and South Australia*

Established in 2012, the VTCC provides strategic coordination and advice to the Victorian Government about the ongoing development, promotion and use of trails. The Committee is chaired by a senior Member of Parliament who reports directly to the Minister for Tourism and Major Events. The Chair also provides regular reports to: the Minister for Roads; the Minister for Environment and Climate Change; the Minister for Regional and Rural Development; the Minister for Planning; and the Minister for Sport and Recreation. Each of the Ministers has departmental representatives on the VTCC.

### Strategic context

The strategy sits within a broader strategic context. Its development has been informed and guided by a number of related strategies including:

- *Victoria's 2020 Tourism Strategy*
- *Victoria's Cycling Strategy – Cycling into the Future 2013–2023*
- *Victoria's Cycling Tourism Action Plan 2011–2015*
- *Draft Regional Tourism Strategy 2013–2016.*

Following the 2012 release of the Victorian Competition and Efficiency Commission's Report, *Unlocking Victorian Tourism: an inquiry into Victoria's tourism industry*, the Department of Environment and Primary Industries published the *Tourism Investment Opportunities of Significance in National Parks Guidelines*. These guidelines provide a framework to enable private investment in tourism infrastructure and associated trails in National parks.

Government policy is now reflected in legislation which enables private tourism investment in national parks.

#### Case study 1: Great Ocean Walk, Victoria, Australia

The Great Ocean Walk is the State's premier multi-day bushwalking experience. This 104-kilometre trail stretches the spectacular south-west coast and traverses coastline and forest from Apollo Bay to the iconic Twelve Apostles, Port Campbell National Park. The trail offers walkers the option of short walks of a few hours to day hikes and seven-night/eight-day camping experiences. The proximity to local towns also allows for visitors to stay in 'off-walk' accommodation and enjoy a variety of independent or packaged services, such as tours, guides, transport providers, food and wine.

The Walk, opened in January 2006, is still in its infancy, but the economic benefits of the trail are becoming evident. The Great Ocean Walk now involves more than 40 marketing partners; and in 2009, the Walk provided an estimated annual impact of \$15 million (including marketing, visitor expenditure and flow-on expenditure) and more than 100 full-time jobs.<sup>6</sup>

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<sup>6</sup> Street, R (2009), *Economic Impact Assessment of the Great Ocean Walk*



## DEMAND FOR TRAILS

At present, trails are predominantly used for local recreation and tourism activities that are summarised below.

### Sight-seeing and tourism

As previously mentioned, there is little existing research that specifically focuses on trail use patterns, however, Parks Victoria's surveys show sight-seeing as the top ranked activity in which visitors participated at park locations. Other popular activities (excluding physical activity/walking) were: socialising and children's play; and picnicking.

Trails also have strong appeal with domestic and international travellers who are seeking nature-based and adventure tourism experiences. The opportunity to get up-close to Australian wildlife in their natural environment is a major drawcard for overseas tourists, although some visitors are worried about the presence of snakes.

Another growing area of interest for visitors to Victoria (which is relevant to trail tourism) is indigenous culture.

Victoria is renowned for staging highly successful sporting and cultural events. Trail-based events – such as adventure races and mountain-biking competitions – are becoming increasingly popular and provide an economic boost to the site's surrounding region through tourism and retail expenditure. Events also generate media exposure and positive profiling opportunities.

A prime example is the Surf Coast Century – an annual 100km trail run journey (for individual or group participants) that takes in wild surf coast and beautiful hinterland on its route that starts and finishes in Anglesea. The event attracts trail and mountain runners from around the State and further afield and encourages participants to stay and explore the Great Ocean Road region.

### Physical activity

A focus of public health and wellbeing awareness campaigns is encouraging increased participation in physical activity and preservation of mental health. In 2007, it was estimated that the direct gross cost of physical inactivity to the Victorian budget was \$375 million.<sup>7</sup>

Many people are discovering the benefits of outdoor exercise that allows them to enjoy fresh air and scenery while working out. Cost-conscious fitness fans can also take a walk, run or ride without having to pay membership, registration or entry fees.

While data about the activities undertaken by trail users is limited, Parks Victoria's visitor surveys highlight walking as the most popular physical activity undertaken in park locations. The Australian Sports Commission<sup>8</sup> reports that walking (excluding bushwalking) continues to be the most popular activity nationally, across genders and age groups. Cycling is rated as the fourth most popular activity, followed by running (fifth most popular), and bushwalking (eighth most popular).

In addition to bush and forest walking and hiking, trails are also popular for: bike-riding; horse-riding (where permitted); and trail running.

### Cultural and artistic pursuits

As well as exploring the historic and cultural relevance of the areas which trails traverse, these sites are ideal for pursuing artistic hobbies such as photography, painting and drawing, with the diverse landscapes, flora and fauna providing creative inspiration.

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<sup>7</sup> State of Victoria (2012), *Cycling into the Future 2013-23, Victoria's Cycling Strategy*

<sup>8</sup> Australia Sports Commission (2010), *Participation in Exercise, Recreation and Sport Survey (ERASS) Annual Report 2010*

## TARGET MARKETS

Trails are key attractions for domestic and international visitors looking for quality nature-based experiences that help support and reinforce destination branding. They are also frequented by local residents for recreational activity.

### International visitors

Discovering Australia's, including Victoria's, spectacular natural attractions is high on the 'to do' list of most visitors from overseas. Tourism Victoria's data shows demand for nature-based tourism is steadily increasing, this includes visitors to National or State parks, wildlife parks, zoos or aquariums or botanic/public gardens. The definition of 'nature based tourist' extends to those who enjoy bushwalking, whale or dolphin watching, snorkelling or scuba diving.

Tourism Victoria's *Nature-based Tourism Market Profile for the year ending June 2012*<sup>9</sup> shows the State hosted almost 1.2 million international overnight nature-based visitors (68% of all international overnight visitors) who stay an average 26.4 nights, which represents a total 31.8 million visitor nights.

Demonstrating a desire for trail-type experiences, during the same 2011/12 period 68% of international overnight guests visited a National or State park and 36% went bushwalking or for a rainforest walk.<sup>10</sup>

Adventure tourism is another key international visitor market that is relevant to this strategy. Adventure tourism visitors are defined as those who experienced bushwalking or rainforest walks, fishing, scuba diving, snorkelling, surfing, sailing, windsurfing, kayaking or other outdoor activities while on their trip to Australia.

Almost 597,000 international overnight adventure tourism visitors travelled to Victoria in the year ending June 2012 who stay an average of 27.1 nights, which represents almost 16.2 million visitor nights. Nearly three-quarters (74%) of international adventure visitors to Victoria went bushwalking or on rainforest walks.<sup>11</sup>

### Domestic visitors

Nature-based tourism involving domestic visitors is growing in Victoria. According to Tourism Victoria's nature-based traveller data, the State received almost 3.1 million domestic overnight nature-based visitors (up 4.6% on the previous year), accounting for approximately 11.7 million visitor nights (up 5.2%). The average length of stay for such visitors was 3.7 nights.<sup>12</sup>

Intrastate visitors represented the largest proportion (75%) of domestic nature-based visitors; interstate visitors accounted for 25% (primarily driven by New South Wales).<sup>13</sup>

Nearly a third (32%) of the domestic overnight nature-based visitors to and within Victoria were travelling as a family group. The next highest group was couples (29%).<sup>14</sup>

Half the domestic overnight nature-based visitors participated in bushwalking or a rainforest walk and a further 44% visited a national or State park.

### Local users

At a grassroots level, trails can be a source of community pride and be important local landmarks of cultural and heritage significance.

For communities, trails are an important infrastructure element that support recreational and fitness activities such as walking, cycling and running. An increasing number of Australians are choosing unstructured activities for exercise and recreation, such as walking, cycling, mountain-biking and running, over more traditional organised team-based sports or gymnasiums.

<sup>9</sup> Tourism Victoria (2012), *Nature-based Tourism Market Profile for the year ending June 2012*

<sup>10</sup> Ibid.

<sup>11</sup> Tourism Victoria (2012), *Adventure Tourism Market Profile for the year ending June 2012*

<sup>12</sup> Tourism Victoria (2012), *Nature-based Tourism Market Profile for the year ending June 2012*

<sup>13</sup> Ibid.

<sup>14</sup> Ibid.

Trails may also provide a transport function for local commuters, moving between work and home, or connecting local destinations.

Given the broad and growing appeal of trails to domestic and international tourism markets as well as local residents for recreation purposes, as referred to earlier these natural assets have great potential to boost regional economies and generate business opportunities and jobs if they are developed into quality, well-marketed tourism experiences.

## BENEFITS OF TRAILS

Trails deliver jobs and economic benefits to Victorians. They also play an important part in improving health and wellbeing, enhancing the liveability of communities and providing prospective visitors to the region/State with reasons to visit and stay.

To gain maximum benefit from the trail network through increased use and visitation, however, there needs to be further: market research; investment; development of infrastructure and complementary tourism experiences and products; and consumer information provision.

### Economic impact

Tourism is a major driver of economic growth in Victoria and in 2011/12 (financial year) the industry employed over 200,000 people and injected \$19.1 billion into the economy.<sup>15</sup> The total contribution of tourism accounted for approximately 5.8% of Victoria's Gross State Product.<sup>16</sup>

Trails play an important role in nature-based tourism. Whether long distance, such as the Great Ocean Walk, or short recreational paths located in communities, trails encourage visitors to stop, stay longer, and increase their spend.

Commercial trail-based businesses, including guiding services, equipment and passenger transport and equipment hire, create local jobs and provide opportunities to package and promote regional products to establish destination experiences.

Trail-based events, such as mountain-bike competitions and adventure races, are gaining in popularity and can attract significant visitor numbers to regional locations. Competitors and their families, spectators and organisers can boost the demand for accommodation, food and beverage, and other services.

### Case study 2: Trails create economic growth

Scotland has identified mountain-biking as a product strength and has actively invested in and promoted the activity to domestic and international visitors.

In 2009, mountain-biking tourism (single purpose visitation) was estimated to contribute AU\$77 million per annum to Scotland's economy.<sup>17</sup> When the total estimated economic contribution of visitors who participated in mountain-biking during their visit was measured, the estimate increased to AU\$198 million.

Likewise, Whistler Bike Park, Canada, has embraced the opportunity for economic growth through bike tourism. In 2006, the impact to the regional economy (GDP) of mountain-bike tourism from the Whistler Bike Park was estimated at AU\$41 million, including AU\$36 million in direct tourism expenditure.<sup>18</sup>

### Health and wellbeing

The direct gross cost of physical inactivity to the Victorian budget was estimated at \$375 million per year in 2007.<sup>19</sup>

Trails are an accessible form of recreation. Trail-based recreation is generally free, self-directed and available to all people, all day, every day. Good quality, accessible trails encourage physical activity and improved health.

Physical activity has also been shown to improve mental health and help relieve stress. The economic cost of mental illness is high in Australia - estimated to be approximately \$20 billion per year, which includes the costs from loss of productivity and absence from the workforce.<sup>20</sup>

<sup>15</sup> Australian Bureau of Statistics (2011), *Tourism Satellite Account 2010-2011* (ABS cat. no. 5249.0)

<sup>16</sup> State of Victoria (2013), *Victoria's 2020 Tourism Strategy 2013*

<sup>17</sup> Scottish Enterprise (2009), *Economic Value of Mountain Biking in Scotland*

<sup>18</sup> Western Canada Mountain Bike Tourism Association (2007), *Sea to Sky Mountain Biking Economic Impact Study – Overall Results*

<sup>19</sup> State of Victoria (2012), *Cycling into the Future 2013-23, Victoria's Cycling Strategy*

## **Livability**

Quality recreational facilities, such as trail networks, can help create attractive places to live and visit. Walking and cycling are relatively cheap modes of transport. Further, well-planned trail networks can make it easier for people to move around, granting an alternative to the use of private cars (providing environmental benefits). Trails also provide a low impact means of travelling through the landscapes and play an important role in connecting people with nature.

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<sup>20</sup> Council of Australian Governments' Meeting, 14 July 2006, [http://archive.coag.gov.au/coag\\_meeting\\_outcomes/2006-07-14/](http://archive.coag.gov.au/coag_meeting_outcomes/2006-07-14/)



## OPPORTUNITIES FOR VICTORIA

One of Victoria's great strengths is its access to a comprehensive and diverse range of trails. The State, while geographically compact, has considerable variation in climate and geography with mountains, coastline, desert and snow, and a wide range of attractive tourism experiences.

### Creating an 'enabling environment'

To harness the immense potential for trails and related tourism trail products, it is important that Victoria:

- develop an agreed strategic framework to help guide a whole-of-government approach to trail planning, development and management,
- identify a clear process for prioritising trail investment,
- facilitate investment in tourism trail products,
- enhance partnerships with industry and the community to develop and operate trails,
- facilitate easier access to information and booking facilities to support trail use,
- focus on improving the experiences of trail users to ensure continued and better usage of past investments,
- promote Victoria as a trail-based destination,
- invest in trail marketing.

### An internet-reliant audience

The increasing self-sufficiency of travellers in researching, planning and booking their trips has been well documented, with the internet becoming tourists' main source of information.

According to Google US research released in August 2012, 83% of leisure travellers and 76% of business travellers use the internet to plan their travel.<sup>21</sup>

Common travel planning activities include: researching for upcoming trips; research as the result of seeing online advertising; and brainstorming or starting thinking about a trip.

As well as gaining satisfaction from the 'do it yourself' approach of online trip planning, the internet allows consumers to peruse reviews and comments from 'real life' travellers.

With the rapidly growing popularity of mobile devices, online travel tools and smartphone/tablet applications ('apps'), people are also showing more spontaneity when it comes to travel. Such technologies also allow travellers to research their destination while en route or 'in-situ'.

### Nature-based tourism

Nature-based tourism, incorporating trail tourism, is a product strength for Victoria. With approximately 17% of the State designated as National Parks and more than 800 kilometres of rail trails, Victoria is well positioned to capitalise on these assets over the next 10 years.<sup>22</sup>

The tourism industry is already taking advantage of trails in its local areas, with new businesses opening and existing business expanding their offerings to include trail experiences for visitors. This point is demonstrated by the Great Ocean Walk where more than 40 operators now participate in the Walk's marketing program (see Case study 1: Great Ocean Walk, Victoria, Australia on page 8).

The brand positioning developed for nature-based tourism rests on the premise of rewarding natural experiences complemented by sophisticated offerings that bring balance back to the lives of visitors. This principle is equally relevant for trail experiences and the basis for the *The Art of Walking* – the Great Ocean Walk's 2009 marketing campaign. An opportunity exists to build on the awareness created by the campaign with further marketing activity.

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<sup>21</sup> Google/Ipsos MediaCT US (2012), *The 2012 Traveler*

<sup>22</sup> <http://parkweb.vic.gov.au/about-us/who-we-are/what-we-manage>

### **Building on regional strengths**

Each of Victoria's regions has trail offerings they currently promote, to varying degrees, as tourism and recreational highlights.

With further development to improve the quality of the visitor experience, there will be increased opportunities for trail offerings to be recognised and promoted as destination product strengths.

Where relevant, trails and trail-based activities can also be built into regions' identities through marketing activity. A prime example is North East Victoria, known for its cycling experiences, has leveraged the campaign for Mt Buller (and Mansfield) as a cycling destination through the 'Bike Buller' brand.

In some regions, trail-based walking and cycling activities are available, but are not amongst the 'hero' tourism products promoted through media and marketing activity. Daylesford is such an example, where its spa, wellbeing, food and wine experiences are the priority themes for marketing and advertising exposure. In such cases, however, there are ample opportunities to link and integrate trail experiences with the region's (and Victoria's overall) product strengths, including food, wine, history, events and touring.

### **Improving Victoria's overall brand health**

Tourism Victoria's *Brand Health Survey* evaluates the current strength or health of Tourism Victoria's competitive image by measuring consumer perceptions of the State's product strengths. The survey gauges Victoria's positioning in relation to two key attributes of direct relevance to this strategy: 'an ideal place for cycling and mountain-biking'; and 'offering iconic walks in a natural setting'.

The latest results show that Victoria holds the leading position (21%) as the State that is ideal for cycling and mountain-biking, followed by New South Wales (18%). In relation to the attribute of 'offering iconic walks in a natural setting' Victoria is in fourth position (12%) behind Queensland (23%), New South Wales (19%) and Tasmania (17%).<sup>23</sup>

As referred to earlier in commentary about opportunities to build regional strengths (above), and reiterated by the *Brand Health Survey* results, there is huge potential for Victoria to continue to building g recognition of its cycling and mountain-biking attributes; and raise awareness of its walking assets in key domestic markets. A concerted effort to develop the State's nature-based and adventure tourism will see our profile, visitation and economy flourish. It is evident that an opportunity exists to develop tracks and trails in Victoria in order to build adventure and nature based tourism opportunities for the benefit of the community. Adequate resourcing would enable Victoria's tracks and trails to be marketed to the world bringing economic and social gains. Communication with the tourism market is fundamental and an investment in an online presence is imperative.

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<sup>23</sup> Roy Morgan (2013), *Brand Health Survey July 2013*

## STRATEGIC DIRECTIONS

The 10-year *Victorian Trails Strategy 2013-2023* presents five key strategic directions relating to trail investment, development, awareness, experience and marketing.

The five core strategy elements will form the basis of an initial three-year action plan to be implemented between 2014 and 2016.

Successive action plans (for the period of 2017 to 2023) will build on the completed work of previous plans and respond to emerging needs and changing trends. Performance measures and targets will be included in the action plans.

Some actions will be allocated to individual agencies, while responsibility for others may be shared between organisations.

## STRATEGIC DIRECTION 1: PROVIDE A STRATEGIC FRAMEWORK FOR TRAIL INVESTMENT

Limited resourcing and funding for planning, development and maintenance of trails is a major impediment to the management of existing trails within Victoria. It is also a constraint to developing stronger trail products that can compete with other trail-based tourism destinations located interstate or overseas.

Victoria already has an established, extensive network of trails. With relatively modest investment, specific elements of the network could be upgraded and new links with towns or transport made, increasing demand for, and use of, such trails.

Interagency collaboration will be crucial to the Trail Strategy's success - ensuring that the knowledge and perspectives of the various key players is incorporated into the planning and implementation.

To help guide a whole-of-government approach to trail planning, development, management and maintenance that delivers economic and social benefits, an agreed strategic framework has been prepared.

The adoption of investment principles provides a strategic process for the selection of trails for development in Victoria.

**Action:** The Victorian Government will take a coordinated approach to planning and investing in trails by adopting a strategic framework that incorporates investment principles and target market profiling.

### Case study 3: Milford Track, New Zealand

The Milford Track in New Zealand is 53 kilometres and walked by approximately 14,000 visitors each year, with a maximum of 90 people beginning the walk each day during the walking season (late October to late April).

Walkers can choose to take the walk with a guided group or tackle it on their own. Guided walkers stay in lodges that offer comfortable beds, hot showers, flushing toilets, drying rooms, lounge areas and fully catered meals. Guided tours are operated by a private company, Ultimate Hikes, that is the sole provider for guided walks on the Milford Track. Costs range from approximately AU\$1,300 to AU\$2,500.<sup>24</sup>

Unguided walkers sleep in Department of Conservation (DOC) huts that offer bunks with mattresses, water supply (no showers), flushing toilets, cooking facilities and heating. Walkers need to carry their own equipment and food to make their own meals. Accommodation in the DOC huts for three nights and transport between the track and Te Anau is around AU\$300.

Commercial licenses are granted by the DOC. In 2004, Ultimate Hikes accommodated 6,000 walkers, achieved revenue of around AU\$10.5 million and employed around 50 full-time staff. Ultimate Hikes allocates five per cent of its revenue to DOC to contribute to the management of the track.<sup>25</sup>

The Milford Track also provides a range of auxiliary services and products, including packages, bus and ferry transportation, accommodation, and retails equipment, maps and guidebooks.

<sup>24</sup> New Zealand dollar converted to the Australian dollar based on an exchange rate of \$1 = \$0.86 and rounded to the nearest million - OANDA 25 July 2013

<sup>25</sup> State of Victoria, Tourism Victoria (2008), *Victoria's Nature-based Tourism Strategy*

## Investment criteria

The Victorian Government will use the investment principles outlined in Table 1 (below) to guide decisions about future investments in trails. Each principle should be considered with reference to the target market (see Table 2) and trail user profile.

**Table 1: Investment Criteria**

Principle	Guidance
<b>Experience</b>	
Trail user profile	Define target market and establish trail user profile.
Quality	<p>Provide a quality experience to meet the needs and expectations of the identified trail user.</p> <p>This extends to which the track meets standards appropriate to its classification such as the Australian Walking Track Grading System (see Appendix 2) and the IMBA Australia Mountain Bike Trail Difficulty Rating System (see Appendix 3).</p> <p>Consideration should extend to quality and type of: trail infrastructure; natural or cultural landscape and its diversity; and associated services such as tour guides, accommodation and retail opportunities.</p>
Access	<p>Provide a level of access appropriate to its identified trail user.</p> <p>Consideration to which the trail is linked into trailhead nodes, key visitor sites or townships as appropriate. This may include trails that provide for commuting and connectivity, are located within or close to urban centres, connect with public transport or link towns.</p>
Safety	Manage all potential safety issues, including flood and fire risk. Potential safety issues may be managed by providing sufficient information to allow trail users to make informed decisions.
<b>Benefits</b>	
Economic benefits	<p>Demonstrate economic benefits to the community (through triggering or direct/indirect economic spend or provision of economic benefits to regional communities through sourcing of local labour, purchasing of local services or materials).</p> <p>Represent the best value for money in terms of increased numbers of trail users.</p>
Social benefits	Demonstrate social benefits to the community.
<b>Sustainability</b>	
Demand	Identify demand, for example, if the trail is in demand by trail users or if it will fill a gap in the market.
Landowners and/or land managers	Consider the support of landowners, land managers, local councils and wider community.
Development costs	Identify resources to design, construct and promote the trail.
Long-term maintenance commitment	Identify resources to manage, maintain and promote the trail.
Natural and cultural values	Have minimal impact on the environment and manage natural and cultural values.
Planning requirements	Identify and address planning requirements, such as bushfire, landslip and erosion, flooding and native flora and fauna legislation.
Strategic imperative	Be supported by State, regional and local development plans.



## Target markets

To spark appeal within different visitor markets, coordination of investment, marketing and promotion of trails is required. Victoria needs a number of well-developed trails and tourism products that will be sufficiently competitive to attract the interest of international and domestic markets. The Victorian Government recognises there is a need for a mix of trails that are significant at international, domestic, intrastate and local community level.

**Table 2: Target markets**

Principle	Guidance
<b>International and national significant trails</b>	
<p>World-class trail experiences located within the natural and cultural landscapes of Victoria, with the highest standard of management and promotion.</p> <p>Support high yield trail-based tourism products.</p> <p>Destinations in their own right, attracting international and interstate visitors.</p> <p>May include major trail hubs that attract high international and interstate use, high level competitions and events.</p>	<p>Exemplars of the competitive strengths of Victoria and Australia as a trails destination.</p> <p>Uniquely representative of the Victorian natural and cultural landscape values.</p> <p>High priority government support at the State level for trail development and management and listed as a priority within Regional Development and Regional Tourism plans.</p> <p>Support viable high-yield trail-based and associated products, services and programs.</p> <p>Higher levels of interstate visitation than State Significant Trails, and significant international visitation, interest and appeal.</p> <p>Directly and indirectly provide economic benefits to the State.</p>
<b>State significant trails</b>	
<p>Significant trail experiences, representative of Victoria's varied landscapes, with a high standard of management and promotion.</p> <p>Support a range of trail-based products and a motivator for intrastate and interstate visitation.</p> <p>May attract some international visitors.</p> <p>May include some major trail hubs and may attract high level competitions and events.</p>	<p>Representative of the regions and/or Victoria's natural and cultural landscapes.</p> <p>Government support at a regional level within the Regional Development Plan for development and management.</p> <p>Support viable trail-based and associated regional tourism products, services and programs.</p> <p>Significant intrastate and interstate visitation, interest and appeal.</p> <p>Directly or indirectly provide economic benefits to a region and/or the State.</p>
<b>Regional and local significant trails</b>	
<p>Regional and local trails and facilities used regularly by regional and local residents for recreation, transport, health and wellbeing.</p> <p>May attract some regional and intrastate visitors primarily for independent trail-based recreation activities.</p> <p>May include some regional trail hubs.</p>	<p>Many are located within close proximity to residential areas, and are often connected to community services and open space areas.</p> <p>Representative of the region's natural and cultural landscapes.</p> <p>Provide access to a diversity of trails of varying difficulty, length and type.</p> <p>Provide opportunities for different trail user groups for active recreation, health and wellbeing.</p> <p>Be recognised by local residents as a popular trail and/or trail network and frequented by people from the surrounding region.</p>

Management, marketing and visitor services enhance visitors' experiences and encourage increased length of stay and repeat visitation for optimum regional economic and social benefit. Before capital and infrastructure investment decisions are made, an assessment of a trail's potential tourism or recreation value is essential.

There is a lack of research into demand for, and economic benefits of, trails and trail products. Opportunities to better integrate existing research and undertake joint investigations are a cost-effective means of sourcing data to improve understanding of the economic benefits of trails for regions and to guide investment.

**Action:** The Victorian Government will articulate the economic benefits of trails and trail products to support infrastructure development of tourism trails.

#### Case study 4: Grampians Peaks Trail, Victoria, Australia

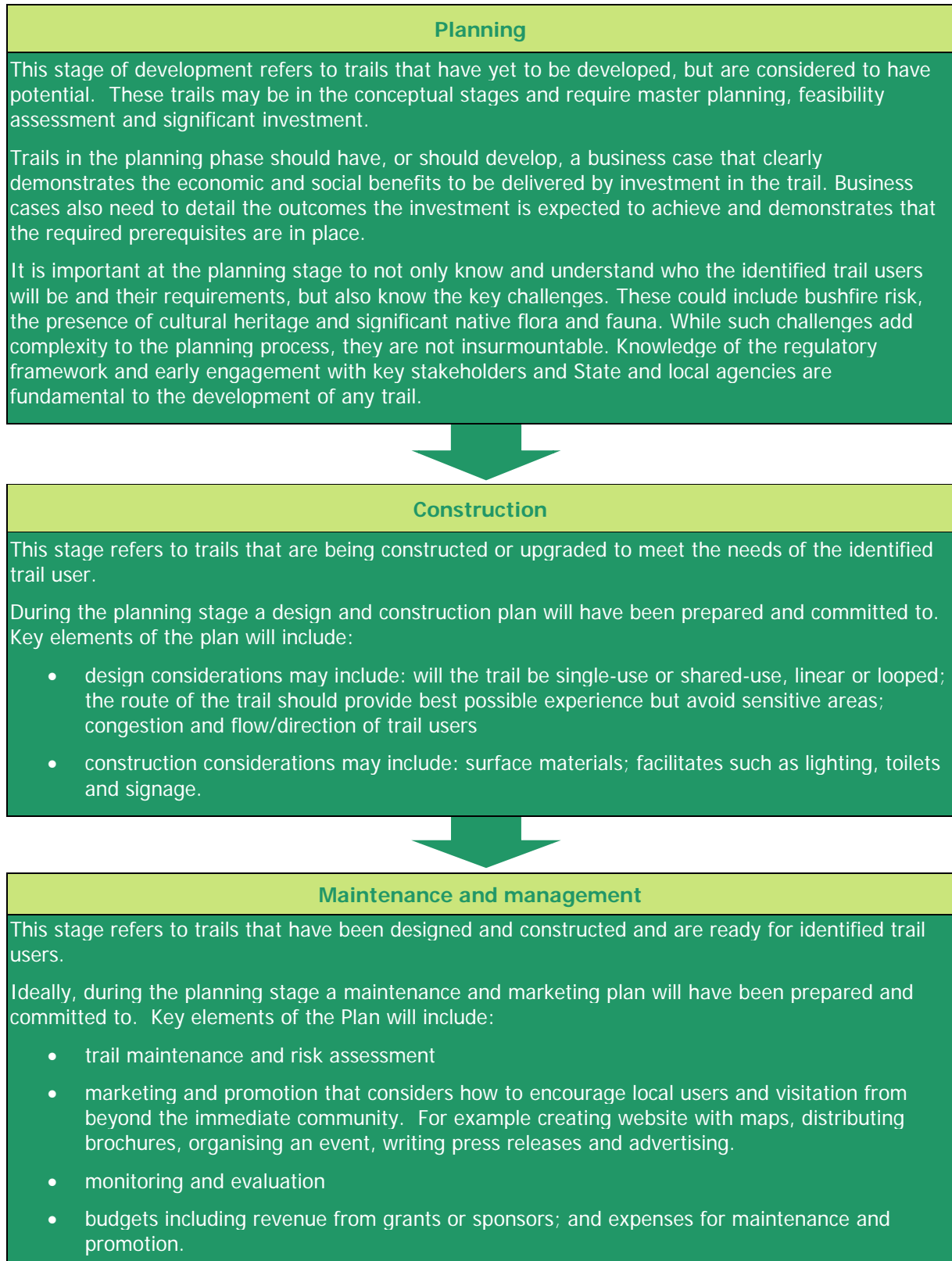
Still in the planning stage, the Grampians Peaks Trail in Victoria when completed will be a world-class, long-distance walking experience, showcasing the beauty and majesty of Gariwerd's natural and cultural landscapes. The trail, when completed, will be 138 kilometres, starting in the north and running south past Halls Gaps to Dunkeld. The trail will provide step-on, step-off options to suit the range of walkers' needs.

A master plan for the trail is currently being prepared. Economic analysis indicates that the walk is expected to yield 32,000 visitor nights in 2015, increasing to over 80,000 visitor nights by 2025 when fully developed. In 2015, the trail is expected to generate an estimated \$2.55 million, increasing to \$6.39 million by 2025. The draft plan identifies the opportunity for local towns, including Halls Gap and Dunkeld, to become 'walking hubs' which provide services and support to walkers.

## STRATEGIC DIRECTION 2: SHARE INFORMATION TO SUPPORT EFFECTIVE PLANNING, DEVELOPMENT AND MAINTENANCE OF TRAILS

Trail development has three distinct phases: planning; construction; and ongoing maintenance and management. All phases must be considered as part of all trail projects.

**Table 3: Stages of trail development**



Inconsistency in trail planning, construction and ongoing maintenance and management across the State shows a clear need for intervention and guidance. The Victorian Government acknowledges the fragmented and limited nature of information available to assist with planning, developing and maintaining trails. In order to assist potential trail developers navigate the process, the Government proposes to develop a trails 'toolkit' to assist agencies with decision-making.

**Action:** The Victorian Government will develop mechanisms to share information to support effective planning, development and maintenance of trails.

Successful trail planning, development and maintenance is dependent on a number of organisations, including Department of Environment and Primary Industries, Parks Victoria, VicTrack, Local Government, private land owners and land managers. Within this complex environment, project delivery can experience time delays and incur increased costs.

**Action:** The Victorian Government will encourage supportive partnerships to create sustainable trails.

#### Case study 5: Working model for sustainable trails

An excellent example of a long distance walking trail that has been well planned and developed – with support from Federal, State and local government, private enterprise and not-for-profit organisations – is the well-publicised Bibbulmun Track in Western Australia.

The 965 kilometre wilderness adventure trail stretches from Kalamunda (near Perth) to Albany, offers visitors the choice of short day strolls or epic six-to-eight week treks.

Whilst the Department of Environment and Conservation (DEC), acts as Manager of the Track, the Bibbulmun Track Foundation is recognised as the primary focal point for community-based support and involvement, and has primary responsibility for promoting the Track to potential walkers and maintaining the Track through a volunteer maintenance program. The Foundation contributes its success to its strong relationships with DEC and the multitude of individuals and organisations involved.

In June 2012, the Foundation launched a new website, which makes planning a walk on the Track much easier, but is also a wonderful promotion for the south west with hundreds of photos showcasing the scenery, flora, attractions and towns along the Track. Around 80 tourism operators are featured on the website.

The new website includes features such as Google maps with the location of campsites, access points and service providers; maps for all current realignments, diversions and alternative routes; section-by-section guide with all key planning information in one place; an online shop to purchase maps and souvenirs.

Not solely reliant on funding from government: 38% of the Foundations gross income came from earned income including walking breaks, tours, guided walks, hire gear and merchandise sales; sponsorship contributed 14%; membership fees contributed 10%; fee for services from DEC contributed 11%; and 27% came from other income generated by donations and fundraising.

In 2007/08, the estimated economic impact of the Track was reported in the following terms: the average day walker spends from an estimated \$50 to \$60 as a result of their walk; walkers on a two-to-three day walk average around \$200; while those on an end-to-end spend more than \$1,400. Based on the 167,200 walks estimated to take place each year, \$39 million (\$28 million excluding equipment) is spent each year as a result of walkers.<sup>26</sup>

<sup>26</sup> The Bibbulmun Track Foundation (2012) *The Bibbulmun Track Foundation Annual Report 2011-2012*.

## STRATEGIC DIRECTION 3: PROVIDE HIGH QUALITY INFORMATION ON TRAILS

In view of consumers' heavy reliance on the internet as an information source and planning tool for travel arrangements, it is imperative that Victoria's trails have a more prominent online profile.

In basic terms, if consumers cannot access internet information about trails (to develop awareness and entice visitation), then they will not be able to spend their tourism dollars on such experiences in Victoria.

At present, there is no central website resource where consumers can access quality information about Victoria's trail network. There is some commentary about trails on various websites hosted by Government agencies, councils, conservation and special interest groups, however, the information is not comprehensive or easy to find.

A lack of website presence is likely to impact awareness of trails' existence as well as deter visitation due to an inability for potential visitors to plan or 'visualise' their experience – a case of 'why risk going somewhere that might not be worth the effort or has a walking distance that's too long for my fitness level', etc.

A trail-related website would be a cost-effective communication channel to share a variety of information for consumers planning their excursions as well as assisting visitors while 'in destination'.

Given the nature of Victoria's trail network as well as the needs and expectations of visitors, the website could provide helpful details such as: trail maps; trail history, features and highlights; activities permitted at specific trails; amenities and facilities available at various sites; advice on appropriate clothing and gear for terrain and conditions; safety and etiquette tips; and weather or incident warnings.

A dedicated website would provide wider opportunities for the government agencies and partnering organisations involved in the Trails Strategy to: create itinerary and trip-planning applications; book packages, accommodation and services; build a database of trail enthusiasts; develop an online trail-user community whose members are interested in trail experiences and events and keen to visit other regions' walking or riding tracks; and engage with trail-users to encourage personal safety as well as conservation of the trail environment.

**Action:** The Victorian Government will encourage trail use by providing high quality online information about Victoria's trails.

### Case study 6: Using the internet

The visitor market is technology-savvy and increasingly using the internet for end-to-end holiday planning and bookings.

The New Zealand Great Walks<sup>27</sup> online booking system, managed by the Department of Conservation (DOC), is an exemplar integrated information and booking system that meets customer needs. The site provides a seamless service across commercial operations and DOC-operated facilities.

Consumers can access information for planning and make real-time bookings for New Zealand's nine Great Walks, including transport services, huts and campsites, lodges, and ferry services. Visitors can also obtain permits via the website in advance of arrival. The system provides information about availability of transport and accommodation capacity for specific dates, making it easy for individuals and groups to confirm bookings.

Another leader is National Trails in the United Kingdom<sup>28</sup> whose website caters for the spontaneous and the planner. All the information necessary for walks in the UK is provided in the one place, from booking accommodation to providing educational and interpretive information on the native wildlife.

<sup>27</sup> <http://www.doc.govt.nz/parks-and-recreation/tracks-and-walks/great-walks/>

<sup>28</sup> <http://www.nationaltrail.co.uk/>



## STRATEGIC DIRECTION 4: CREATE BETTER TRAIL EXPERIENCES

Visitors expect integrated trail-based experiences that incorporate ready access to quality accommodation, good – and local – food and wine, appropriate transport and support services and other complementary experiences.

Encouraging private investment into sustainable trail-based tourism projects in some of Victoria's most compelling landscapes is critical to the future of trail-based tourism.

Building and improving amenities, trail visitor information kiosks, as well as businesses offering nature-based visitor services such as guided walks, group tours and guided interpretation, are other opportunities for improving trail experiences.

Creating better trail experiences also includes communication with potential trail-users through targeted marketing campaigns and the provision of detailed online information.

**Action:** The Victorian Government will work with the trails and tourism industry to deliver compelling experiences to visitors.

### Case study 7: Guidelines for Tourism Investment in National Parks

"The Victorian Government is working to unlock the tourism potential of Victoria's world-class natural assets. We are supporting efforts to attract more visitors to our great State while maintaining important environmental safeguards.

The Guidelines for Tourism Investment Opportunities of Significance in National Parks outline a set of principles for the consideration of investment proposals and a clear process for prospective investors and other parties.

These guidelines make it clear that investment proposals must demonstrate high environmental standards.

Proposals will require a detailed environmental management plan supported by an independent environmental risk assessment and auditing of the plan. There is to be proper community consultation and projects must generate a net public benefit for the community use of the park.

They are a key part of our efforts to enable investment in our regions and provide significant tourism opportunities to make the most of this State's remarkable natural assets.

This plan to boost eco-tourism in Victoria will enable our State to better compete with similar attractions in Australia and overseas and provide people the opportunity to experience, appreciate and care for their natural environment.

We will be supporting sensible and sensitive investment in national parks that complements local environmental, heritage and other values.

Our national parks are much loved and are enormously valuable to our State. By investing in these areas we will help to strengthen their future."<sup>29</sup>

<sup>29</sup> State of Victoria, Department of Sustainability and Environment (2012), *Tourism Investment Opportunities of Significance in National Parks Guidelines*

## STRATEGIC DIRECTION 5: MARKET TRAILS

There is limited market research available about trail visitor markets, including current usage and what visitors are seeking from trail products. An understanding of the target market/s is vital to delivering compelling trail experiences and positioning trails as a competitive strength for Victoria.

Specific market research is therefore required to improve the understanding of the visitor market for trails in Victoria, including:

- identifying and distilling existing tourism market research that will improve insights into tourism trail users, their profile, commercial products, and emerging market trends
- identifying critical gaps in market information and knowledge and determining ways to address them to ensure there is a strong research base for marketing decisions.

**Action:** The Victorian Government will create strong demand for trails by undertaking consumer research to identify existing and potential markets and how best to reach these markets.

There is fierce competition amongst tourism destinations, organisations and operators to attract travellers' attention (and dollars), therefore, captivating marketing activity is crucial to raising awareness of Victoria's trail-based experiences and encouraging visitation. Effective marketing and promotion is required to engage potential trail visitors and convince them to choose a Victorian trip (due to the attractive nature-based experiences, including trail excursions, on offer) above other locations.

**Action:** The Victorian Government will 'hero' Victoria's significant trails in future marketing activity, initially focusing on established 'international-ready' trails, followed by other upgraded trail experiences as the strategy is implemented.

### Case study 8: Murray to Mountains Rail Trail, Victoria, Australia

North East Victoria has stunning scenery and excellent infrastructure for cycling through its rail trail network, including the Murray to Mountains Rail Trail, Great Victorian Rail Trail and High Country Rail Trail.

In 2011, Tourism North East commissioned an economic impact and gap analysis study of the cycling tourism in the region.

Market research indicated that of people who were unaware of the rail trails 74% were likely to visit once aware. Increased awareness of the rail trail is therefore quite likely to translate into higher visitation among its target groups.<sup>30</sup>

The study revealed that recreational cyclists to the Murray to Mountains Rail Trail contributed around \$26.2 million in regional output, and \$13.6 million in regional value, supporting 22.7 jobs. Increasing awareness is therefore likely to translate to higher visitation for the North East. A doubling of 2011 recreational cyclist visitation would see a total regional output of \$52.5 million, a value add to the region of \$27.1 million, with 45.4 jobs being supported.<sup>31</sup>

Anecdotal evidence suggests this is not an isolated case. Victoria has an extensive network of trails that few people know about.

<sup>30</sup> Qontum

<sup>31</sup> SGS Economics and Planning (2012), *North East Victoria Tourism Gap Analysis*

## STAKEHOLDER PARTNERSHIPS

While the Strategy focuses on how the Victorian Government will grow the trails industry, this will only be achieved through working in partnership with a number of key private and public stakeholders.

### **Federal, State and local government**

As previously mentioned, there are several 'layers' of government involvement (and potential for stronger links) with trail management. To ensure this strategy achieves its stated objectives, continued Federal, State and local government engagement will be imperative.

### **Regional Tourism Boards**

The Regional Tourism Boards for each of Victoria's 10 tourism regions have an important role to play in the implementation of the Victorian Trails Strategy. They operate at the interface between the tourism industry, local councils, regional agencies and communities and consequently provide valuable insight into the priorities for activating tourism growth and potential tourism trail products within their regions. Limited resources and competing interests for Government support in tourism will continue, but the Regional Tourism Boards are well positioned to determine the strategic priorities for tourism trails within their regions.

### **Special interest organisations and volunteers**

Fostering relationships with like-minded partner organisations (whose personnel and members have responsibility and passion for trail-based environments and activities) will be crucial to the ongoing preservation and patronage of trails.

Such organisations are significant stakeholders in the trail sector and require ongoing communication, consultation and engagement. These groups also act as important ambassadors for trail-based experiences and have valuable resources and contacts.

Organisations such as the Bushwalking Clubs and Associations, Biking Riding Groups, Committees of Management, as well as volunteer programs and, will prove beneficial for trail management, maintenance and promotion. They are effectively 'captive audiences' for trail experiences.

### **Private operations**

Encouraging trail-related business operations, including guiding services and equipment hire, as well as associated tourism products that are desired by travellers, will be crucial to increasing demand for, and uptake of, trail experiences as well as boost regional economies.

## IMPLEMENTATION, MONITORING AND EVALUATION

The VTCC will be responsible for implementing, monitoring and reporting on the progress of this strategy. It will also be responsible for the preparation of the action plans.

### Indicators

The VTCC will measure its progress using the following parameters:

- completion of tasks outlined in action plans and progression towards achieving set objectives,
- evaluating trail use and tourism expenditure in places where trails are located,
- examining industry support for trails and trail services,
- monitoring the number of trails products developed across Victoria,
- evaluating website 'hits' and uptake of online tools,
- tracking media exposure and marketing effectiveness in relation to Victoria's profile as a premier trail destination.

## EXAMPLES OF VICTORIA'S SIGNIFICANT TRAILS

[Trails to be identified on a map of Victoria in design stage]

### Examples of International/National Significant Trails

For walking:

- Falls to Hotham Alpine Crossing (a section of the Australian Alps Walking Track)
- Grampians Peaks Trail
- Great Ocean Walk

For cycling:

- Mt Buller Mt Stirling Mountain Bike Hub
- Murray to Mountains Rail Trail

### Examples of State Significant Trails

For walking:

- Coastal Wilderness Walk (Croajingalong National Park)
- Great South West Walk
- Great Walhalla Alpine Trail (a section of the Australian Alps Walking Track)
- Mornington Peninsula Walk
- Murray River Adventure Trail
- Surf Coast Walk
- Wilsons Promontory Circuit

For cycling:

- Crater to Coast Rail Trail (Camperdown to Princetown)
- East Gippsland Rail Trail
- Falls Creek Mountain Bike Hub
- Forrest Mountain Bike Hub
- Gippsland Plains Rail Trail
- Goldfields Track (a section of the Great Dividing Trail)
- Great Victorian Rail Trail
- Great Southern Rail Trail
- Lilydale to Warburton Rail Trail
- You Yangs Mountain Bike Hub



## DESCRIPTION OF INTERNATIONAL/NATIONAL SIGNIFICANT TRAILS

### **Grampians Peaks Trail** (in planning)

The Grampians Peaks Trail will be a world-class, long-distance walking experience, showcasing the beauty and majesty of Gariwerd's (the Grampians National Park) natural and cultural landscapes. The trail will connect some of the area's most spectacular peaks, from the massive sandstone outcrops in the north to the rugged and remote Mount William Range and will include the townships of Dunkeld and Halls Gap. When complete, the full trail will be a 138-kilometre walk and it will be a step-on, step-off experience where visitors can tailor the walk to suit their needs.

### **Great Ocean Walk**

The Great Ocean Walk is the State's premier multi-day bushwalking experience. This 104-kilometre trail stretches the spectacular south-west coast and traverses coastline and forest from Apollo Bay to the iconic Twelve Apostles, Port Campbell National Park. The trail offers walkers the option of short walks of a few hours to day hikes and seven-night/eight-day experiences.

Priority infrastructure works are needed to ensure this walk remains a world class experience and include: extending it to end at the Twelve Apostles; realignment of the track at Milanesia Track and Coach Road; and track works on Elliot Road and Parker Road.

### **Falls to Hotham Alpine Crossing**

The Falls to Hotham Alpine Crossing follows a beautiful section of the Australian Alps Walking Track, one of the world's great Alpine walks stretching 680 kilometres from Walhalla to Canberra. The Alpine National Park is a spectacular setting for cross-country hiking. This walk features a 25-kilometre trek (approximate minimum distance) between Mt Hotham and Falls Creek Alpine Resorts. Suitable for experienced walkers, highlights include spectacular landmarks such as the Razorback Ridge, Mt Feathertop and the basalt column structures that give Ruined Castle its name. The Tawonga and other historic huts and mines along the way provide a glimpse into the history of the High Country and any number of wildlife can be encountered – from pygmy possums to wild brumbies and emus. Work is currently underway to develop a Master Plan that will strengthen this tourism product.

### **Mt Buller Mt Stirling EPIC Mountain Bike Trail** (in development)

The Mt Buller Mt Stirling EPIC Mountain Bike Trail project involves the construction of a 40-kilometre trail that will offer visitors to the region a long-distance, cross-country descending ride, with stunning views across the Victorian High Country. The construction of the trail is set to become Australia's first International Mountain Bicycling Association (IMBA) EPIC mountain bike trail building on the success of Mt Buller Mt Stirling Alpine Resort as Australia's first mountain bike destination to be awarded the IMBA Ride Centre (Bronze Level) designation. Mt Buller Mt Stirling has a range of Mountain Bike trails that cater for beginners to advanced riders.

### **Murray to Mountains Rail Trail**

Reputably Australia's best known rail trail – and most developed Victorian rail trail – this popular trail is ideal for exploring the well-known gourmet food and wine region in which it is located. Over 100 kilometres of sealed off-road trails provide the perfect link between the already popular tourist villages of Wangaratta, Beechworth, Rutherglen and Bright. The off-road sealed trail network has recently been extended from Wangaratta to Milawa, and from Bright to Wandiligong. Priority infrastructure to complete the network includes extensions from Bright to Harrietville, from Beechworth to Huon via Yackandandah – connecting the Murray to Mountains Rail Trail to the High Country Rail Trails – and from Wangaratta to King Valley.

## DESCRIPTION OF STATE SIGNIFICANT TRAILS

### **Coastal Wilderness Walk**

The Coastal Wilderness Walk extends over 120 kilometres from Marlo to Mallacoota in East Gippsland. This walk features a magnificent section of an isolated stretch of coastline in the Croajingolong National Park. Currently it is graded as level 4 and only experienced and suitably equipped hikers are recommended to undertake this remote walk. The focus of future planning will be on a 40-kilometre section that will start at Tamboon Inlet and finish at Wingan Inlet. Existing walking tracks and associated infrastructure will be upgraded to provide a sustainable and high quality walk. In time it is intended that this trail will be of international significance and become an 'Icon Walk'.

### **Crater to Coast Rail Trail**

Starting at a volcanic lake south of Camperdown in Western Victoria, this trail runs through some spectacular rainforest and over trestle bridges. Rough in sections, it is best tackled by those with good quality mountain bikes and an adventurous spirit. Currently the 40-kilometre trail ends at Timboon with planning underway to extend it to Princetown.

### **East Gippsland Rail Trail**

This 94-kilometre trail runs between Bairnsdale and Orbost, travelling through the towns of Nicholson, Bruthen, Colquhoun, Nowa Nowa and Tostaree. It passes through forest and farmland landscapes with occasional views of the Gippsland Lakes and connects to Lakes Entrance joining the Gippsland Lakes Discovery Trail.

### **East Prom Circuit via the Lighthouse**

One of Victoria's best known National Parks, Wilsons Promontory is the most southerly point of the Australian mainland and one of Victoria's favourite wilderness destinations for its beautiful beaches, superb coastal scenery and abundant wildlife. This trail is 54 kilometres in length and graded as level 4.

### **Falls Creek Mountain Bike Trails**

A series of aqueducts form the backbone of the resort's cross-country offering – a trail network spanning over 40 kilometres and past iconic local features such as Wallace's Hut, Mt McKay and Rocky Valley Lake. A four-stage, fully funded project to expand the network is underway. Stage 1 has been completed, stage 2 is in progress and stages 3 and 4 are due to be completed by March 2015.

### **Forrest Mountain Bike Trails**

Rated as some of the best mountain bike trails in Australia, Forrest has become a "must do" location. With over 60 kilometres of sign-posted single tracks, there is way too much for just one day. Further investment and upgrading is required to strengthen its tourism appeal.

### **Gippsland Plains Rail Trail**

The Gippsland Plains Rail Trail extends 67 kilometres from Traralgon to Stratford in Central Gippsland. Priority infrastructure to complete the rail trail is to undertake an off-road realignment of the 10 kilometre section between Traralgon and Glengarry.

### **Goldfields Track**

This 210-kilometre trail runs from Mount Buninyong through Ballarat, Creswick, Daylesford and Castlemaine, finishing in Bendigo. It targets the reasonably fit and skilled mountain bikers, with some great short track options for the novice. Further investment in track maintenance is required for the trail to become a significant tourism product.

### **Great Southern Rail Trail**

This 49-kilometre rail trail starts in Leongatha, travels through Koonwarra, Meeniyan and Stony Creek before finishing at Foster and it offers spectacular views of Wilson's Promontory along the way. Work is currently underway to extend the trail to Welshpool. An additional extension to Yarram and Port Albert will complete the trail, at which time it will be 93 kilometres in length.

### **Great South West Walk**

The Great South West Walk has been developed as a bushwalking trail suitable for most ages and abilities comprising short two-hour loop walks, full day walks, or for the intrepid, the entire 250 kilometre loop that begins and ends at the Portland Maritime Discovery and Visitor Information Centre.

### **Great Walhalla Alpine Trail**

The Great Walhalla Alpine Trail follows the first 40 kilometres of the Australian Alps Walking Track, one of the world's great Alpine walks stretching 680 kilometres from Walhalla to Canberra. This level 4 trail is located in the beautiful Baw Baw National Park with alpine meadows of native wildflowers, twisted snow gums, towering mountain ash, prehistoric myrtle beech, stunning geological formations and fast flowing streams.

### **Great Victorian Rail Trail**

The Great Victorian Rail Trail is the longest continuous rail trail in Australia, traversing 134 kilometres through north east Victoria. The rail trail meanders through farmland, along the Goulburn River and in the foothills of the magnificent Victorian High Country. It travels through the Mitchell, Murrindindi and Mansfield shires, connecting towns and communities including Tallarook, Trawool, Kerrisdale, Homewood, Yea, Yarck, Molesworth, Cathkin, Alexandra, Koriella, Kanumbra, Merton, Woodfield, Bonnie Doon, Maindample and Mansfield.

### **Lilydale to Warburton Rail Trail**

This 40-kilometre rail trail is one of Australia's most popular, starting from the end of the Melbourne metropolitan rail network at Lilydale and heading through increasingly rural landscape to the resort town of Warburton nestled in the mountains.

### **Mornington Peninsula Walk**

On the 100-kilometre Mornington Peninsula Walk visitors can explore the beautiful bushlands, see kangaroos and birds, gaze over deserted ocean beaches of national, marine and State parks, and discover the area's early history at Point Nepean, Cape Schanck, Collins Settlement Site, the Briars and Coolart Homestead.

### **Murray River Adventure Trail (in planning)**

The proposed Murray River Adventure Trail is to be a multi-day adventure along the river, including walking, kayaking and cycling. The next step for the trail is to develop a master plan.

### **Surf Coast Walk**

The 44-kilometre Surf Coast Walk, located only 75 minutes from Melbourne on the Great Ocean Road, runs from Point Impossible to Fairhaven along the coast and through the towns of Torquay, Jan Juc, Bells Beach, Anglesea and Aireys Inlet.

### **You Yangs Mountain Bike Trails**

The You Yangs Mountain Bike Trails are located 55 kilometres southwest of Melbourne and 20 kilometres north of Geelong. The You Yangs has two designated mountain biking areas that contain over 60 kilometres of purpose build trails that cater for riders of all ages and abilities. The easier and flatter Kurrajong Plantation weaves for 20 kilometres and is ideal for family groups wanting to experience mountain biking for the first time. The Stockyards area for the more experienced rider has 40 kilometres of flowing single trails and a number of dedicated downhill trails with steep technical sections, making the most of the rocky landscapes.

## APPENDIX 1: RELEVANT STRATEGIES AND PLANS

### **Victoria's 2020 Tourism Strategy, July 2013**

*Victoria's 2020 Tourism Strategy* is a whole-of-government document providing a clear vision of how the tourism industry can increase its economic and social contribution to the State. Through seven priority areas, the strategy outlines how Tourism Victoria, working with key stakeholders, will implement identified actions to realise the potential of the tourism market. The major directions identified in the strategy include: increasing focus on growth markets, such as China, India, Malaysia and Indonesia; building stronger collaboration between the Victorian Government and regions to ensure growth in visitation; increasing the tourism benefits of major and business events; and identifying and realising key tourism investments.

### **Unlocking Victorian Tourism: an Inquiry into Victoria's Tourism Industry 2011 and Victorian Government response to the Victorian Competition and Efficiency Commission's Final Report 2012**

The Inquiry reviewed State and local regulatory barriers to the development of the tourism industry and creation of new tourist infrastructure and opportunities to improve the management of State assets to better meet the needs of the tourism industry. The Victorian Government's response provides information about changes made to the land-use planning system and the management of public lands to ensure the tourism sector can respond and grow in an appropriate way.

### **Tourism Development Guidelines in Victorian National Parks**

The Victorian Government has approved guidelines outlining the process for private investment in sensible, appropriate and sustainable tourism infrastructure in Victoria's national parks. The guidelines consider values of public land categories, planning requirements for bushfire risk, climate variability and any native title implications. The Minister will be able to grant up to 99-year leases in national parks to provide greater certainty for investors, with lease conditions applied to ensure proposals are consistent with the principles of ecological sustainable development and the management of any identified environmental risks.

### **Draft Regional Tourism Strategy 2013–2016**

This draft strategy outlines the course for regional tourism for the next three years and fulfils a major direction of the *Victoria's 2020 Tourism Strategy*.

### **Cycling into the Future 2013–23, Victoria's Cycling Strategy, December 2012, and Victoria's Cycling Tourism Action Plan 2011–2015**






This strategy recognises the important role that cycling plays in Victoria – as part of the transport system, as an enjoyable recreation activity, a healthy form of exercise and a tourism drawcard. The action plan has been developed by Tourism Victoria to position Victoria as the leading state for cycle tourism, as well as outlining how the Government will leverage and enhance opportunities in cycle tourism.

### **Victoria's Cycle Tourism Action Plan 2011-2015**






The plan recognises that cycle tourism plays a key role in offering sustainable transport and tourism experience options to visitors to and within the State of Victoria.

## APPENDIX 2: AUSTRALIAN WALKING TRACK GRADING SYSTEM

[Example below - to be inserted in design stage]






Minimum information					
	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5
Symbol					
Distance	x km	xx km	xx km	xx km	xx km

Recommended information					
	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5
Symbol					
Distance	Distance to complete walk. x km	Distance to complete walk. xx km	Distance to complete walk. xx km	Distance to complete walk. xx km	Distance to complete walk. xx km
Gradient	Flat.	Gentle hills.	Short steep hills.	Very steep.	Very steep and difficult.
Quality of path	Well formed track.	Formed track.	Formed track, some obstacles.	Rough track, many obstacles.	Rough unformed track.
Quality of markings	Clearly sign posted.	Clearly sign posted.	Sign posted.	Limited signage.	No directional signage.
Experience Required	No experience required.	No experience required.	Some bushwalking experience recommended.	Experienced bushwalkers.	Very experienced bushwalkers.
Time	High and low estimate of time needed to complete track (eg 1.5-2hrs).	High and low estimate of time needed to complete track (eg 1.5-2hrs).	Time needed to complete track (hours/days).	Time needed to complete track (hours/days).	Time needed to complete track (hours/days).
Steps	No steps.	Occasional steps.	Many steps.	N/A	N/A

## APPENDIX 3: INTERNATIONAL MOUNTAIN BICYCLING ASSOCIATION (IMBA) AUSTRALIA TRAIL DIFFICULTY RATING SYSTEM

[Example below - to be inserted in design stage]

7.0 Trail Difficulty Rating System - User Guide					
	Very easy  White Circle	Easiest  Green Circle	More Difficult  Blue Square	Very Difficult  Single Black Diamond	Extremely Difficult  Double Black Diamond
<b>Description</b>	Likely to be a fire road or wide single track with a gentle gradient, smooth surface and free of obstacles.  Frequent encounters are likely with other cyclists, walkers, runners and horse riders.	Likely to be a combination of fire road or wide single track with a gentle gradient, smooth surface and relatively free of unavoidable obstacles.  Short sections may exceed these criteria.  Frequent encounters are likely with walkers, runners, horse riders and other cyclists.	Likely to be a single trail with moderate gradients, variable surface and obstacles.	Likely to be a challenging single trail with steep gradients, variable surface and many obstacles.	Extremely difficult trails will incorporate very steep gradients, highly variable surface and unavoidable, severe obstacles.
<b>Suitable for</b>	Beginner/ novice cyclists. Basic bike skills required. Suitable for most bikes.	Beginner/ novice mountain bikers. Basic mountain bike skills required. Suitable for off-road bikes.	Skilled mountain bikers. Suitable for mountain bikes.	Experienced mountain bikers with good skills. Suitable for better quality mountain bikes.	Highly experienced mountain bikers with excellent skills. Suitable for quality mountain bikes.
<b>Fitness Level</b>	Most people in good health.	Most people in good health.	A good standard of fitness.	Higher level of fitness.	Higher level of fitness.
<b>Trail Width</b>	Two riders can ride side by side.	Shoulder width or greater.	Handlebar width or greater.	Can be less than handlebar width.	Can be less than handlebar width.
<b>Trail Surface and obstacles</b>	Hardened with no challenging features on the trail.	Mostly firm and stable. Trail may have obstacles such as logs, roots and rocks.	Possible sections of rocky or loose tread. Trail will have obstacles such as logs, roots and rocks.	Variable and challenging. Unavoidable obstacles such as logs, roots, rocks drop-offs or constructed obstacles.	Widely variable and unpredictable. Expect large, committing and unavoidable obstacles.
<b>Trail Gradient</b>	Climbs and descents are mostly shallow.	Climbs and descents are mostly shallow., but trail may include some moderately steep sections.	Mostly moderate gradients but may include steep sections.	Contains steeper descents or climbs.	Expect prolonged steep, loose and rocky descents or climbs.