

JULY 2014

VICTORIA'S TRAILS STRATEGY 2014–24



Published by the Victorian Government, Melbourne, July 2014.

© The State of Victoria July 2014

This publication is copyright. No part may be reproduced by any process except in accordance with the provisions of the *Copyright Act 1968*.

Authorised by the Victorian Government,
Tourism Victoria
Level 32, 121 Exhibition Street
Melbourne Victoria 3000

Postal address: GPO Box 2219T
Melbourne VIC 3001

Printed by Impact Digital. Printed on recycled paper.

ISBN 978-1-921572-73-9 (Print)

ISBN 978-1-921572-74-6 (pdf)

For more information, please telephone (03) 9653 9777
or email feedback@tourism.vic.gov.au

Disclaimer

This publication may be of assistance to you but the State of Victoria and its employees do not guarantee that the publication is without flaw of any kind or is wholly appropriate for your particular purposes and therefore disclaims all liability for any error, loss or other consequence which may arise from you relying on any information in this publication.

Accessibility

If you would like to receive this publication in an accessible format, such as large print or audio, please telephone (03) 9653 9777 or email feedback@tourism.vic.gov.au

Deaf, hearing impaired or speech impaired? Call us via the National Relay Service on 133 677 or visit www.relayservice.gov.au

This document is also available in PDF format on the internet at www.tourism.vic.gov.au

CONTENTS

Minister's foreword	1
Chairman's foreword	2
Executive summary	3
Introduction	4
Demand for trails	7
Size and potential of the market	8
Benefits of trails	9
Opportunities for Victoria	11
Strategic directions	13
Strategic direction 1: Provide a strategic framework for trail investment	14
Strategic direction 2: Support effective planning, development and maintenance of trails	19
Strategic direction 3: Provide high quality information on trails	22
Strategic direction 4: Create better trail experiences	24
Strategic direction 5: Market trails	26
Stakeholder Partnerships	28
Implementation, monitoring and evaluation	29
Appendices	
Appendix 1: Relevant strategies and plans	30
Appendix 2: Trail grading systems	32
Appendix 3: Examples of Victoria's significant trails	34

MINISTER'S FOREWORD

Victoria's Trails Strategy 2014-2024 presents an exciting opportunity for State and local government agencies, community groups and investors to work together to realise the immense economic, social and environmental potential of our picturesque trail network.

Improvement, maintenance and promotion of Victoria's trails, as well as the creation of trail-based businesses, will provide local communities with valuable social and recreation hubs and generate tourism, business and employment opportunities.

This Strategy comes at a time when we are seeing significant growth in domestic and international demand for nature-based and adventure tourism.

Trails have also long been associated with physical and mental health, by facilitating exercise in the fresh air, inspiring artistic expression and providing a tranquil setting for relaxation and reflection.

Over the next 10 years, this Strategy will set a framework for actions that strengthen Victoria's profile as a tourism destination offering rich and diverse experiences and boost regional economies.

I look forward to working closely with the Victorian Trails Coordinating Committee to implement this Strategy and encourage everyone to explore the natural beauty of our State's trails.



A stylized, handwritten signature in blue ink, appearing to read 'Louise Asher'.

The Hon Louise Asher MP
Minister for Tourism and Major Events

CHAIRMAN'S FOREWORD

Victoria, blessed with natural beauty and abundant wildlife, is just waiting to be explored.

There are 2,000-plus trails that showcase our natural assets and represent exciting opportunities for economic growth, particularly in regional areas.

A wide range of people are attracted to our trails for a variety of reasons for a short, gentle walk to long distance, multi-day hike or an adrenaline-pumping mountain bike ride.

There are a wealth of health, educational, cultural and environmental benefits that can be drawn from exploring tracks and trails and enjoying the great outdoors.

Victoria's Trails Strategy 2014-2024 sets out the need for investment and ongoing maintenance of our trails system to ensure a safe and positive experience for all visitors.

Furthermore, Victoria's ability to tap into the fast growing nature tourism sector will provide a boost to regional economies and have positive flow-on effects, including job creation.

The five directions identified in the strategy are: provide a strategic framework for trail investment; support effective planning, development and maintenance of trails; provide high quality information regarding trails; create better trail experiences; and market trails.

Investment is also necessary to facilitate development of accommodation, amenities and destination marketing. Given the information needs and expectations of intrastate, interstate and international visitors, creating a central, comprehensive online resource is a must.

I acknowledge the input of senior personnel from State Government departments and agencies and community groups who provided feedback via written and verbal submissions.

Thank you to everyone who has contributed, especially the members of the Victorian Trails Coordinating Committee who collaborated to develop this Strategy's suite of initiatives that seek to enhance opportunities for trail tourism and regional development.

It is with great pleasure that I present *Victoria's Trails Strategy 2014-2024* which has the potential to open up Victoria's large network of tracks and trails to the world.



A handwritten signature in dark ink that reads "Philip R. Davis". The signature is written in a cursive, flowing style.

Philip R Davis
Chairman
Victorian Trails Coordinating Committee

EXECUTIVE SUMMARY

The purpose of *Victoria's Trails Strategy 2014-2024* is to provide a whole-of-government approach and clear vision regarding the planning, management and promotion of trails in Victoria.

Vision

The vision is for Victoria to be recognised as a leading 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 Victoria's vision, this Strategy presents a set of key initiatives to:

- > improve the quality of trail experiences in Victoria
- > increase awareness and visitation to Victorian trails
- > support complementary tourism and retail businesses
- > seek improved understanding of trail-user markets, their motivations and influences.

Maximising the potential

Victoria's diverse and accessible landscapes, coupled with its extensive network of trails, provide an ideal platform from which to build stronger and more sustainable trail-based destinations. With a moderate level of investment to improve the quality of trail experiences and associated products and services, Victoria has an opportunity to attract visitors, grow regional economies and create jobs, while also delivering social, environmental and cultural benefits for local communities. Equally important are the local users, many of whom have worked hard so others may enjoy them and without whose efforts many trails would not exist.

Historically, developing a trail network entailed only building the trail. Today, consumers are more discerning and have higher expectations. To realise the potential economic and social benefits of trails, Victoria needs to create quality visitor experiences that match users' expectations. Therefore, the way we think about trail development needs to change significantly – encompassing trail infrastructure as well as related products and services, consumer information and marketing activities.

Strategic directions

This Strategy presents five key strategic directions relating to trail investment, development, awareness, experience and marketing:

- > strategic direction one: provide a strategic framework for trail investment
- > strategic direction two: support effective planning, development and maintenance of trails
- > strategic direction three: provide high quality information on trails
- > strategic direction four: create better trail experiences
- > strategic direction five: market trails.

Action plans

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

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

Subsequent 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.

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

INTRODUCTION

The purpose of *Victoria's Trails Strategy 2014-2024* (the Strategy) is to provide a whole-of-government approach and clear vision to the planning, management and promotion of trails in Victoria.

Vision

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

To achieve Victoria's vision, this Strategy presents a set of key initiatives to:

- > improve the quality of trail experiences in Victoria
- > increase awareness and visitation to Victorian trails
- > support complementary tourism and retail businesses
- > seek improved understanding of trail-user markets, their motivations and influences.

What's on offer in Victoria

Peaceful walking tracks, challenging mountain-bike routes and family-friendly rail trails following historic train routes – Victoria's trails offer an abundance of opportunities to explore and enjoy the great outdoors.

Victoria's network of 2,000-plus trails has a total length of approximately 8,000 km, including shared use trails in both urban and regional locations.¹

The Victorian Government manages 85% of the State's trails, many of which are in protected areas, such as National Parks, State Parks, State forests and reserves.²

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 km or 50% of recreational trails; the Department of Environment and Primary Industries manages 2,800 km or 35% of the network; and Local Government and Committees of Management manage 1,200 km or 15% of the trail network.³

Of the trails managed by Local Government and Committees of Management, some 800 km are rail trails.⁴ Victoria is recognised for its range of rail trails that provide opportunities for recreational walking, cycling and horse riding. Rail trails also provide a transport function for local commuters, moving between work and home, while others, such as the Murray to Mountains Rail Trail, are tourism attractions in their own right.

Maximising the potential of Victoria's trails

Victoria's diverse and accessible landscapes, coupled with its extensive network of trails, provide an ideal platform from which to build stronger and more sustainable trail-based destinations. With a moderate level of investment to improve the quality of trail experiences and associated products and services, the State has an opportunity to attract visitors, grow regional economies and create jobs, while also delivering social, environmental and cultural benefits for local communities.

Historically, developing a trail network entailed only building the trail. Today, consumers are more discerning and have higher expectations. To realise the potential economic and social benefits of trails, Victoria needs to create quality visitor experiences that match users' expectations. Therefore, the way we think about trail development needs to change significantly – encompassing trail infrastructure as well as related products and services, consumer information and marketing activities.

1 State of Victoria, Parks Victoria (2004), *Victorian Trails Strategy 2005-2010*

2 *ibid.*

3 *ibid.*

4 Railtrails Australia Inc (2007), *Rail Trails of Victoria and South Australia*

Trail definition

For the purpose of this Strategy, a trail is defined as an established path, route or track which often traverses natural areas and is used by people for non-motorised recreation, such as walking, running, cycling, mountain biking and horse riding.

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

Policy context

The Victorian Trails Coordinating Committee has overseen the development of this Strategy. The diagram below shows the key agencies involved in the Committee.

Established in 2011, the Victorian Trails Coordinating Committee provides strategic coordination and advice to the Victorian Government regarding the planning, development, management and promotion of trails. The Committee's Chair reports directly to the Minister for Tourism and Major Events. The Chair also provides regular reports to: the Minister for Roads; the Minister for Planning; the Minister for Environment and Climate Change; the Minister for Sport and Recreation; and the Minister for Regional and Rural Development. Each Minister has departmental representatives on the Committee.

Strategic context

This 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*
- > *Victoria's 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 that enables private tourism investment in national parks.



Case study one: Great Ocean Walk, Victoria, Australia

The Great Ocean Walk is the State's premier multi-day bushwalking experience. This walk stretch approximately 100 km trail along the spectacular south-west coast and traverses the coastline and forest from Apollo Bay to the iconic Twelve Apostles, Port Campbell National Park. The trail offers walkers the option of short walks 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 Great Ocean 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.⁵

5 Street, R (2009), *Economic Impact Assessment of the Great Ocean Walk*

DEMAND FOR TRAILS

Demand for trails is predominantly driven by tourism and physical activity.

Tourism and events

In Victoria, there is little trail-specific research, however, Parks Victoria's 2011 visitor survey⁶ shows sight-seeing and walking as the most popular activities undertaken by visitors in National and State Parks.

Trails have strong appeal with domestic and international travellers who are seeking nature-based and adventure tourism experiences. A major drawcard for overseas tourists is the opportunity to see Australian wildlife in a natural environment.

Trail-based events – such as adventure races and mountain biking competitions – are becoming increasingly popular and provide an economic boost to the 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 100 km trail run that starts and finishes in Anglesea and takes in ocean and forest scenery. The event attracts trail and mountain runners from around the world and encourages participants to stay and explore the Great Ocean Road region.

Physical activity

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

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 2011 visitor survey highlights walking as the most popular physical activity undertaken in park locations. The Australian Sports Commission⁸ reports that walking (excluding bushwalking) continues to be the most popular activity nationally, across gender and age demographics. Cycling is rated the fourth most popular activity, followed by running (fifth most popular) and bushwalking (eighth most popular).

Education

Trails provide an opportunity for visitors to access areas of natural or cultural value. Through storytelling and interpretation, visitors gain knowledge and an appreciation of Victoria's natural environment, culture and heritage.

As well as exploring natural and cultural places, these sites are ideal for pursuing artistic hobbies such as photography, painting and drawing, with the diverse landscapes, flora and fauna providing creative inspiration.

6 <http://www.enviroactive.com.au/resource/parks-victoria-visitation-data>

7 State of Victoria (2012), *Cycling into the Future 2013–2023, Victoria's Cycling Strategy*

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

SIZE AND POTENTIAL OF THE MARKET

There is a role for trail-based tourism to ensure the benefits of visitor spend are spread into regional Victoria.

Trails are key attractions for international and domestic visitors looking for quality nature-based experiences. Equally important are the local users, many of whom have worked hard to drive the development of trails so others may enjoy them and without whose efforts many trails would not exist.

International visitors

Engagement with international growth markets is important to the performance of the Victorian economy. Between 2013 and 2021, it is expected that approximately two-thirds of the growth in tourism spend will come from international markets.⁹ For the year ending September 2013, international visitor expenditure in Victoria was \$4.7 billion – of this, \$277 million was spent in regional Victoria.¹⁰

Discovering Australia's, including Victoria's, natural attractions is high on the 'to do' list of most international visitors. Tourism Victoria's data shows demand for nature-based tourism – including visits to a National or State Park, wildlife park, zoo or aquarium or botanic or public garden, and/or bushwalking, whale – or dolphin-watching, snorkelling or scuba diving – is steadily increasing.

Tourism Victoria's *Nature-based Tourism Market Profile for the Year Ending June 2013*¹¹ shows Victoria hosted almost 1.3 million international overnight nature-based visitors who stayed an average of 27 nights. Demonstrating a desire for trail-type experiences, during the same period, 36% went bushwalking or for a rainforest walk.¹²

Domestic visitors

Intrastate and interstate visitors are important to Victoria's tourism industry. In the year ending June 2013, domestic visitors spent (combined overnight and day trip expenditure) an estimated \$14.8 billion in Victoria – of this, \$7 billion was spent in regional Victoria.¹³

Nature-based tourism involving domestic visitors is growing in Victoria. According to Tourism Victoria's nature-based traveller data, the State hosted 3.3 million domestic overnight nature-based visitors staying on average 3.7 nights and almost 3.7 million day trips were undertaken to, and within, Victoria by domestic nature-based visitors in the year ending June 2013.¹⁴

Intrastate visitors represented the largest proportion (75%) of the domestic overnight nature-based visitors; interstate visitors accounted for 25% (primarily driven by New South Wales).¹⁵

Half of 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

From a local community perspective, trails are important infrastructure that support recreational and fitness activities, such as walking, cycling and running. They may also be a source of community pride and important local landmarks of cultural and heritage significance. Without continued community involvement, the extent and quality of the existing trail network is unlikely to be sustained.

9 Tourism Victoria (2013), *Victoria's 2020 Tourism Strategy*

10 Tourism Victoria (2013), *International Tourism Expenditure in Victoria*

11 Tourism Victoria (2013), *Nature-based Tourism Market Profile for the Year Ending June 2013*

12 *ibid.*

13 Tourism Victoria (2013), *Domestic Tourism Expenditure in Victoria*

14 Tourism Victoria (2013), *Nature-based Tourism Market Profile for the Year Ending June 2013*

15 *ibid.*

BENEFITS OF TRAILS

The broad and growing appeal of trails to domestic and international visitor markets, as well as local residents for recreational purposes, means Victoria's trails have great potential to boost regional economies and generate business opportunities and jobs if they are developed into quality, well-marketed tourism experiences.

Trails also play an important part in improving health and wellbeing – enhancing the liveability of communities and providing prospective visitors with a reason to visit and stay.

To gain maximum benefit from the trail network through increased usage and visitation, however, there needs to be further:

- > investment
- > development of infrastructure and complementary tourism products
- > consumer information provision
- > marketing.

Economic

Tourism is a major driver of economic growth. In 2012/13, Victoria's tourism industry employed more than 203,000 people and injected \$19.6 billion into the economy.¹⁶ The total contribution of tourism accounted for approximately 5.8% of Victoria's Gross State Product.¹⁷

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

16 Australian Bureau of Statistics (2014), *Tourism Satellite Account 2012-2013* (ABS cat. no. 5249.0)

17 State of Victoria (2013), *Victoria's 2020 Tourism Strategy 2013*

Environment and heritage

Trails provide an opportunity for people to experience a cultural and natural environment first-hand as well as improve their environmental and cultural awareness and appreciation.

Many trails also connect users to heritage values, such as shipwreck sites and lighthouses along the coast and former gold mining and sawmilling locations in forests.

Other benefits may include protecting the environment by focusing activities and visitation away from ecologically sensitive areas.

Social

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. Trail activities, such as voluntary trail maintenance and conservation, also provide opportunities for social interaction and enjoyment.

Liveability

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 private car use. Trails also provide a low environmental impact means of travelling through the landscapes and play an important role in connecting people with nature.

Case study two: 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 £46.5 million per annum to Scotland's economy.¹⁸ When the total estimated economic contribution of visitors who participated in mountain biking during their visit was measured, the estimate increased to £116 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 CA\$18.8 million, including CA\$16.5 million in direct tourism expenditure.¹⁹

¹⁸ Scottish Enterprise (2009), *Economic Value of Mountain Biking in Scotland*

¹⁹ Western Canada Mountain Bike Tourism Association (2007), *Sea to Sky Mountain Biking Economic Impact Study – Overall Results*

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 – 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 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 investment (into trail infrastructure)
- > 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 used the internet to plan their travel.²⁰

Common travel planning activities include:

- > research for upcoming trips
- > research as the result of seeing online advertising
- > brainstorming or starting to think 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-based tourism, is a key strength for Victoria. With approximately 17% of the State designated as National Parks and 26 rail trails, Victoria is well positioned to capitalise on these assets over the next 10 years.²¹

Victoria's tourism industry is already taking advantage of trails in regional areas, with new businesses opening and existing business expanding their offerings to include trail experiences for visitors. A relevant example is the Great Ocean Walk where more than 40 operators now participate in the Walk's marketing program (see Case study one: Great Ocean Walk, Victoria, Australia on page 6).

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.

Walk Victoria's Icons is a branded portfolio of four

20 Google/Ipsos MediaCT US (2012), *The 2012 Traveler*

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

long distance walks managed by Parks Victoria comprising of the Great Ocean Walk, Grampians Peaks Trail, Falls to Hotham Alpine Crossing and the Coastal Wilderness Walk. Located across Victoria, the walks offer four distinctive walking experiences highlighting natural beauty, iconic landscapes, Australian wildlife and cultural values. The collective approach is an initiative designed to drive visitation and spend to regional Victoria. An opportunity exists to leverage this brand with further marketing activity.

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 incorporated into a regions' brand. A prime example is north-east Victoria, renowned for its cycling experiences, which has leveraged the Murray to Mountain Rail Trail, and 'Bike Buller' brand activities to reinforce its brand strength in this area.

In some regions, trail-based walking and cycling activities are available, but are not amongst the tourism attractions promoted through marketing activity. In these regions there may be opportunities to link and integrate trail experiences with the region's (and Victoria's) overall product strengths, including food, wine, heritage, events and touring.

Improving Victoria's overall brand health

Tourism Victoria's *Brand Health Survey* conducted by Roy Morgan Research measures the current strength or health of Tourism Victoria's brand and Victoria's position across a range of attributes among Australians. 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
- > offering iconic walks in a natural setting.

The latest survey results show that Victoria holds the leading position (21%) as the Australian State that is ideal for cycling and mountain biking, followed by New South Wales (18%).

In relation to 'offering iconic walks in a natural setting', Victoria is in fourth position (12%) behind Queensland (23%), New South Wales (19%) and Tasmania (17%), with Tasmania jumping to first place when excluding respondents who identified their own State.²²

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

22 Tourism Victoria's *Brand Health Survey*, Roy Morgan Research July 2013

STRATEGIC DIRECTIONS

Victoria's Trails Strategy 2014-2024 presents five key strategic directions relating to trail investment, development, awareness, experience and marketing:

- > strategic direction one: provide a strategic framework for trail investment
- > strategic direction two: support effective planning, development and maintenance of trails
- > strategic direction three: provide high quality information on trails
- > strategic direction four: create better trail experiences
- > strategic direction five: market trails.

Action plans

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

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

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 trail-based tourism destinations located interstate or overseas.

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

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.

Investment criteria

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

Case study three: Milford Track, New Zealand

The Milford Track in New Zealand is 53 km and walked by approximately 14,000 visitors each year, with up to 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, which is the sole provider for guided walks on the Milford Track. Costs are approximately NZ\$1,750 per person.

Independent 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 NZ\$300.

Commercial licences are granted by the DOC. In 2004, Ultimate Hikes accommodated 6,000 walkers, achieved revenue of approximately NZ\$10.5 million and employed about 50 full-time staff. Ultimate Hikes allocates 5% of its revenue to DOC to contribute to the management of the track.²³

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

Table 1: Investment criteria

Principle	Guidance
Experience	
Trail-user profile	> Define target markets and establish trail-user profile.
Quality	> Provide a quality experience to meet the needs and expectations of the identified trail-user. > The extent to which the track meets standards appropriate to its classification such as the Australian Walking Track Grading System and the IMBA Australia Mountain Bike Trail Difficulty Rating System (see Appendix 2). > 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.
Access	> Provide a level of access appropriate to its identified trail-user. > Consideration of the extent 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.
Safety	> Manage all potential safety issues, including flood and fire risk and consider emergency access. Potential safety issues may be managed by providing sufficient information to allow trail-users to make informed decisions.
Benefits	
Economic benefits	> Demonstrate economic benefits, e.g. trails may generate tourism spend and provide direct/indirect economic benefits of local labour, purchasing of local services or materials.
Environment and heritage benefits	> Demonstrate environment and heritage benefits, e.g. trails provide opportunities for the community/visitors to experience a natural and cultural environment and increase their environmental and cultural awareness and appreciation. Other benefits may include protecting the environment by focusing activities/visitation away from sensitive areas.
Social benefits	> Demonstrate social benefits, e.g. trails provide an opportunity to develop and grow community pride and help people connect through community groups.
Sustainability	
Demand	> Identify demand, e.g. does the trail fill a gap in the market, what is the point of difference or how is it unique?
Landowners and/or land managers	> Consider the support of landowners, land managers, local councils and wider community.
Development costs	> Identify resources to design and construct the trail.
Long-term commitment of resources	> 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.

Trail categories

To stimulate visitor demand within different 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: Characteristics and attributes of trail categories

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

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 existing research regarding demand for, and economic benefits of, trails and trail products.

Opportunities to better integrate existing research and undertake joint investigations offer a cost-effective means of sourcing data to improve the 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 related products to support infrastructure development of trails.

Infrastructure development, maintenance and promotion are expensive, and mostly rely on government funding. To create sustainable trails, better models of funding and cost recovery must be employed.

ACTION: The Victorian Government will investigate sustainable funding models for trails.

Case study four: Grampians Peaks Trail, Victoria, Australia

In the planning and stage one construction stage, the Grampians Peaks Trail in Victoria 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 144 km in length, starting in the north near Mt Zero and running south past Halls Gap to Dunkeld. The trail will provide step-on, step-off options to suit a range of walkers' needs.

A master plan for the trail is currently being prepared. The draft plan identifies the opportunity for local towns, to become 'walking hubs' that provide services and support to walkers. The plan also proposes trail alignment, camping grounds and accommodation zones that may provide future opportunities for private investment.

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.

STRATEGIC DIRECTION 2: SUPPORT EFFECTIVE PLANNING, DEVELOPMENT AND MAINTENANCE OF TRAILS

Trail development has three distinct phases: planning; construction; and ongoing maintenance, management and marketing. The three phases must be considered for all trail projects.

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

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

To create sustainable trails, their planning, development and maintenance is dependent on stakeholders working together. Depending on the complexity of the trail or project, organisations involved may include Federal, State and Local Government, regional tourism boards, peak bodies, special interest organisations, volunteers and business operators.

ACTION: The Victorian Government will engage with key stakeholders to create sustainable trails.

Table 3: Stages of trail development

 Planning This stage of development refers to trails that have not yet been developed, but are considered to have potential benefits to Victoria. Such trails may be in the conceptual stage and require master planning, feasibility assessment and significant investment. In the first instance, project facilitation discussions with all land managers, land owners and decision-makers are necessary to ensure there are no 'show stoppers' before significant outlay of resources. Trails in the planning phase should have, or should develop, a business case that clearly demonstrates the economic and social benefits to be delivered by investment in the trail. Business cases also need to detail expected outcomes of the investment and demonstrate that the required prerequisites are in place. It is important during the planning stage to not only identify and understand the trail-user markets and their requirements, but also know the key challenges. These could include bushfire risk and the protection of cultural heritage and significant native flora and fauna. While such challenges add complexity to the planning process, they are not insurmountable. Knowledge of the regulatory framework and early engagement with key stakeholders and State and local agencies are fundamental to the development of any trail.
 Construction This stage refers to trails that are being constructed or upgraded to meet the needs of the identified trail-user. During the planning stage a design and construction plan will have been prepared and committed to. Key elements of the plan will include: > design considerations which may include: emergency access; whether the trail will be single use or shared use, linear or looped; whether the route of the trail will provide the best possible experience, but avoid sensitive areas; possible congestion and flow/direction of trail-users. > construction considerations, e.g. surface materials, amenities and facilities such as lighting, toilets and signage.
 Ongoing maintenance/management/marketing This stage refers to trails that have been designed and constructed and are ready for identified trail-users. During the planning stage a maintenance and marketing plan will have been prepared and committed to. Key elements of the plan will include: > governance arrangements and management body > trail maintenance and risk assessment > renewal of infrastructure > marketing and promotion that considers how to encourage local users and visitation from beyond the immediate community, e.g. creating a website with maps, distributing brochures, organising an event, preparing media materials and advertising > monitoring and evaluation > budgets, including revenue from grants or sponsors > expenses for maintenance and promotion.

Case study five: 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 km wilderness adventure trail stretches from Kalamunda (near Perth) to Albany, offering visitors the choice of short day strolls or epic six-to-eight week treks.

Whilst the Department of Environment and Conservation (DEC) manages 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 attributes 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 to make visit planning easier and promote the scenery, flora, attractions and towns along the Track. About 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 guides 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 Foundation's gross income in 2011/12 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 \$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.²⁴

24 The Bibbulmun Track Foundation (2012), *The Bibbulmun Track Foundation Annual Report 2011/2012*.

STRATEGIC DIRECTION THREE: 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 information online about Victoria's trails (to build awareness and drive 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 Victoria's trails but it is fragmented across various websites and hard to find, and the information is incomplete and not comprehensive.

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 live up to expectations'.

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

Given the diversity and extent of Victoria's trail network as well as the needs and expectations of visitors, a new 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
- > weather and incident warnings.

A dedicated website could also provide wider opportunities for government agencies and partnering organisations to be involved in this Strategy to:

- > create itinerary and trip-planning applications
- > enable booking of 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
- > 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 information about Victoria's trails.

Case study six: 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 Walks²⁵ online booking system, managed by the Department of Conservation (DOC), is an exemplar of integrated information and booking systems that meets customer needs. The site provides a seamless service across transport services 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 Kingdom²⁶ whose website caters for spontaneous visitors and those who like to plan their trips. 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.

While some websites focus on long walks, others entice visitors to their town by showcasing their great short walks. Tasmania's 60 Great Walks website and iPhone app offer a range of their best walks. The site provides information on the trail distance, grade, and facilities and includes maps and photos.

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

26 <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 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 all 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 local tourism businesses to support the development of tourism products and services to create a quality visitor experience.



Case study seven: 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 with 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."²⁷

27 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 target markets 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 markets 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 undertake 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 Victoria above other locations.

ACTION: The Victorian Government will promote Victoria's trails.

Case study eight: Murray to Mountains Rail Trail, Victoria, Australia

North-east Victoria has stunning scenery and excellent infrastructure for cycling on 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 trails is therefore quite likely to translate into higher visitation among target groups.²⁸

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. Improved awareness is therefore likely to result in 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.²⁹

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

28 SGS Economics and Planning (2012), *North East Victoria Tourism Gap Analysis*

29 *ibid*

STAKEHOLDER PARTNERSHIPS

While this 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

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 (excluding Melbourne) for each of Victoria's 10 tourism regions have an important role to play in the implementation of this Strategy. They operate as 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 engagement, communication and consultation. These groups also act as important ambassadors for trail-based experiences and have valuable resources and contacts.

Organisations such as walking clubs and associations, cycling groups, committees of management, as well as volunteer programs will prove beneficial for trail management, maintenance and promotion.

Private operators

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

IMPLEMENTATION, MONITORING AND EVALUATION

The Victorian Trails Coordinating Committee will be responsible for coordinating the implementation, monitoring and reporting on the progress of this Strategy. The progress of this Strategy and each action plan will be reviewed annually and reflected in annual report cards. The Committee will also be responsible for the preparation of the action plans.

Indicators

The Committee will measure its progress using the following parameters:

- > status of tasks outlined in action plans
- > nature-based visitor expenditure in regional Victoria (domestic overnight and day trips)
- > nature-based visitor expenditure in regional Victoria (international overnight)
- > brand health – perception as a State that offers an ideal place for cycling and mountain biking
- > brand health – perception as a State offering iconic walks in a natural setting
- > page views of walking, hiking and cycling content on Tourism Victoria's website (visitvictoria.com).



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, this 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 this 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 Investment Opportunities of Significance in National Parks – Guidelines 2013

The Guidelines outline the process for tourism investment 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 management of any identified environmental risks.

Regional Tourism Strategy 2013–2016

Victoria's Regional Tourism Strategy 2013–2016 is the key medium term strategy for realising the directions for regional tourism identified in Victoria's 2020 Tourism Strategy. *The Regional Strategy outlines how* Tourism Victoria will address challenges confronting regional tourism in the period of 2013 to 2016.

Cycling into the Future 2013–2023

The Cycling Strategy recognises the important role that cycling plays in Victoria – as part of the transport system, an enjoyable recreation activity, a healthy form of exercise and a tourism drawcard.

Victoria's Cycle Tourism Action Plan 2011-2015

The Cycle Tourism 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.

Environmental Partnerships, October 2012

The Victorian Government's *Environmental Partnerships* outlines the priorities for Victoria's environment. The document is a pathway for action by government, communities and businesses in Victoria to maintain a healthy environment.

Since its launch by the Minister for Environment and Climate Change Ryan Smith, Environmental Partnerships has been a key part of the government's delivery of real and tangible results for Victoria's environment.

APPENDIX 2: TRAIL GRADING SYSTEMS

Trail Grading Systems are used to categorise the relative technical difficulty of recreation trails. These systems are used to assist trail users make informed decisions; encourage visitors to use trails that match their skill level; manage risk and minimize injuries; improve the outdoor experience for a wide variety of visitors; and aid in the planning of trails and trail networks.³⁰

Table 4: Australian Walking Track Grading System³¹

	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5
Minimum information					
Symbol					
Distance	x km	x km	x km	x km	x km
Recommended information					
Symbol					
Distance	Distance to complete walk x km	Distance to complete walk x km	Distance to complete walk x km	Distance to complete walk x km	Distance to complete walk x 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 1.5-2 hours)	High and low estimate of time needed to complete track (eg 1.5-2 hours)	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

30 <https://www.imba.com/resources/freeriding/trail-difficulty-rating-system>

31 <http://www.depi.vic.gov.au/forestry-and-land-use/visiting-parks-and-forests/visiting-state-forests/activities/australian-walking-track-grading-system>

Table 5: International Mountain Bicycling Association (IMBA) Australia Trail Difficulty Rating System³²

	Very easy	Easiest	More difficult	Very difficult	Extremely difficult
Symbol					
Description	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.
Suitable for	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.
Fitness level	Most people in good health.	Most people in good health.	A good standard of fitness	Higher level of fitness	Higher level of fitness
Trail width	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.
Trail Surface and obstacles	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 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.
Trail Gradient	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.

APPENDIX 3: EXAMPLES OF VICTORIA'S SIGNIFICANT TRAILS

The following trails are examples of what an international and national or state significant trail may look like. Some of the examples are already developed and popular with international visitors and locals alike. Others shown on the map are still in the planning stage, but are listed because of the potential identified in master plans and feasibility studies.

This list of examples, is just that – examples that have been identified based on information made available to the Victorian Trails Coordinating Committee. It is the intent of this Strategy to provide the framework to develop selection criteria and categorise Victoria's trails as an outcome of the first action plan.

Description of International and National Significant Trails

Falls to Hotham Alpine Crossing (November-April)

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 km from Walhalla to Canberra. The Alpine National Park is a spectacular setting for cross-country hiking. This Icon Walk features a 37 km trek between Falls Creek and Mount Hotham Alpine Resorts. Suitable for experienced walkers, the trail winds its way along alpine ridges through snow gum woodlands and snow grass plains, over rocky summits and past historic huts. The huts along the route 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.

Grampians Peaks Trail (in planning and Stage 1 construction)

The Grampians Peaks Trail will be a world-class, long-distance walking experience, showcasing the beauty and majesty of Gariwerd's natural and cultural landscapes. This Icon Walk 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 144 km walk that allows visitors to step-on, step-off and tailor the walk to suit their needs.

Great Ocean Walk

The Great Ocean Walk is the State's premier multi-day bushwalking experience. This 100 km Icon Walk stretches along the spectacular south-west coast and traverses coastline and forest from Apollo Bay to the Twelve Apostles, Port Campbell National Park. The trail offers walkers the option of short walks to day hikes and seven-night/eight-day experiences.

Mt Buller Mt Stirling Mountain Bike Hub (November-May)

Mt Buller is Australia's first and only accredited IMBA Ride Centre, recognised as offering world-class mountain-bike facilities for all levels of riders. This iconic mountain-bike park features over 100 km of cross-country trails, including: 40 km of dedicated single track; Australia's best cross-country trail – the Stonefly; two skills parks; the country's first flow-down trail – the Copperhead; the country's first modular pump track; and the only chairlift accessible downhill course in the State.

In December 2014, Mt Buller will also launch a new 40 km cross-country trail that offers a long distance, descending ride through Victoria's High Country. It is envisaged that this trail will become an accredited IMBA EPIC Trail, providing an iconic and high quality back-country ride experience. This will make it the first of its kind in Australia and one of the few trails outside of North America to receive such an endorsement.

Murray to Mountains Rail Trail

Reputed as Australia's best known – and Victoria's most developed – rail trail, this popular trail is ideal for exploring the well-known gourmet food and wine region in which it is located. More than 100 km 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; Beechworth to Huon via Yackandandah – connecting the Murray to Mountains Rail Trail to the High Country Rail Trails; and Wangaratta to King Valley.

Description of State Significant Trails

Coastal Wilderness Walk

The Coastal Wilderness Walk extends over 120 km from Marlo to Mallacoota in East Gippsland. This walk features a magnificent stretch of coastline in the Croajingolong National Park. Currently it is a grade four walk and only experienced and suitably equipped hikers are recommended to undertake this remote walk. The focus of future planning will be on a 40 km 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'.

East Gippsland Rail Trail

This 94 km 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.

Falls Creek Mountain Bike Hub (November-May)

A series of aqueducts form the backbone of the resort's cross-country offering – a trail network spanning over 40 km and passing 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 one has been completed, stage two is in progress and stages three and four are due to be completed by March 2015.

Forrest Mountain Bike Hub

Rated as some of the best mountain bike trails in Australia, Forrest (in the Great Ocean Road region) has become a 'must do' location. With over 60 km of sign-posted single tracks, there is way too much for just one day.

Gippsland Plains Rail Trail

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

Goldfields Track

This 210 km trail runs from Mt Buninyong through Ballarat, Creswick, Daylesford and Castlemaine, finishing in Bendigo. It suits the reasonably fit and skilled mountain-bikers, with some great short track options for novice riders.

Great Southern Rail Trail

The 58 km rail trail starts in Leongatha (South Gippsland), travels through Koonwarra, Meeniyan, Stony Creek, Buffalo, Fish Creek and Foster before finishing in Toora and it offers spectacular views of Wilsons Promontory along the way. Work is currently underway to extend the trail 10 km to Welshpool, it is anticipated this section will be open by mid 2015.

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, day walks, or for the intrepid, the entire 250 km 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 km of the Australian Alps Walking Track, one of the world's great alpine walks stretching 680 km from Walhalla to Canberra. This grade four 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 km through north-east Victoria. The rail trail meanders through farmland, along the Goulburn River and into the foothills of the magnificent Victorian High Country. It travels through the Mitchell, Murrindindi and Mansfield Shires, connecting numerous 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 km 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 town of Warburton nestled in the mountains on the upper reaches of the Yarra River, surrounded by lush, tall forests of mountain ash.

Mornington Peninsula Walk

On the 100 km 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 developing a master plan.

Surf Coast Walk

The 44 km 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 and tourist attractions of Torquay, Jan Juc, Bells Beach, Anglesea and Aireys Inlet. It is a high quality, easily accessible trail that can be enjoyed in short or longer lengths for both walking and cycling.

Twelve Apostles Trail (in planning)

Connecting the Twelve Apostles with the volcanic hinterland of Camperdown in Western Victoria, the Twelve Apostles Trail is a shared use trail extending along the old Camperdown Timboon Rail Trail through spectacular rainforest, over trestle bridges in dairy country to the old whiskey distillery town of Timboon. The planning process to extend the trail through Port Campbell, past the Twelve Apostles to Princetown is well progressed.

Wilson's Promontory Circuit via the Lighthouse

One of Victoria's best known National Parks, Wilson's 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 54 km trail is grade four.

You Yangs Mountain Bike Hub

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

EXAMPLES OF VICTORIA'S INTERNATIONAL/NATIONAL AND STATE SIGNIFICANT TRAILS



