

·GREAT VICTORIAN· RAIL TRAIL

Strategic DEVELOPMENT PLAN



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EXECUTIVE SUMMARY

OVERVIEW

The Great Victorian Rail Trail (GVRT) is a 134km recreational trail that follows the old railway through Mansfield, Murrindindi and Mitchell Shires. While the trail currently attracts 74k visitors per annum, the Council Partners associated with the trail are looking to activate it and support it in realising its true tourism potential. To this effect, the Great Victorian Rail Trail Strategic Development Plan has been created to guide the trail in transitioning from an asset into a signature tourism experience.

INDUSTRY BENCHMARKING

Industry benchmarking indicates that market leading rail trails share a number of commonalities: these trails connect thriving tourism towns; offer picturesque and varied landscapes; offer a strong range of accommodation and food/beverage options; are supported by a variety of tour and transport options; celebrate the rich history and heritage of the destination in which they are located; and are connected by cohesive branding and positioning. These critical success factors provide context for the development of the GVRT.

TRAIL EXPERIENCE

A trail audit undertaken from a visitor perspective identified a number of key trail issues. While the trail travels through rolling countryside, there are limited points of interest, poor connectivity with key townships, and a lack of business activation along the trail in terms of supporting services. These issues are exacerbated by the fact that current wayfinding and interpretive signage is inadequate, failing to celebrate existing trail features or direct users to commercially leverageable opportunities.

TRAIL GOVERNANCE

While a comprehensive governance framework was established to initially launch the trail, this has slowly diminished overtime. As a result, the GVRT currently lacks the strategic vision and senior LGA support required for tourism growth. Furthermore, business and community members originally formally included in the governance structure are now failing to be adequately engaged, leading to frustration and apathy.

MARKETING ASSESSMENT

The primary marketing issue associated with the GVRT is lack of awareness, meaning that it is failing to act as a tourism driver. However, historic budget allocated to marketing has been limited (primarily used to fund visitor services in association with the trail), target markets have lacked focus and marketing efforts have largely engaged people once in-region, rather than driving demand associated with the trail.

BUSINESS ENGAGEMENT

Businesses associated with the GVRT are primarily focused in the major townships of Yea, Tallarook, Alexandra and Mansfield, with little available between these destinations. While these businesses recognise that the trail is an asset, it is not seen as a key tourism driver for their operations. Among these business, there is a lack of awareness of business opportunities along the trail, poor understanding of who manages the GVRT, and a lack of effective collaboration. In terms of the trail experience, industry acknowledges the need for more trail services, greater focal points and better connections between the trail heads and key townships.

STRATEGIC TRAIL DEVELOPMENT

While recognising that there are some current challenges with the trail, Council Partners are committed to working together to establish the GVRT as a thriving tourism experience that delivers positive visitor economy outcomes for the destinations, businesses and communities associated with it. This goal will be realised through delivering a range of strategic initiatives in accordance with four key themes:

1. Improve and innovate the trail experience to provide a premium visitor offering:

- Capture and tell the story of existing sites along the trail.
- Create new points of interest along the trail through high-impact artistic installations.
- Improve signage on and around the GVRT.
- Develop new digital functionality to assist with user wayfinding and engagement.
- Extend the GVRT between Tallarook and Seymour to offer a better trail head experience in Mitchell Shire.
- Develop the Mansfield Station Precinct to offer an improved trailhead experience in Mansfield Shire.

2. Activate the trail with a new range of marketing leading products:

- Encourage the development of new tourism products through an EOI and seed funding program.
- Work with businesses to adapt existing products to meet the needs of trail users.
- Assist businesses in packaging existing products for seamless user experiences.
- Audit the offering of major townships through a visitor lens to determine gaps that need to be addressed.

3. Foster engagement and collaboration to optimise positive trail outcomes:

- Establish an effective governance framework with CEO, economic development and operational membership from each Council Partner.
- Form GVRT Industry Groups to inform, educate and collaborate with business and community members.
- Communicate with the Industry Groups to reinforce engagement and collaboration.
- Dissolve the current visitor servicing agreement and replace it with a well-educated and collaborative Visitor Information Centre network.

4. Support demand driving activities that stimulate awareness and conversion:

- Develop GVRT toolkits to assist industry to market the trail.
- Improve marketing efforts through focusing on cyclists and increasing budget for reach through regional and GVRT-specific activities.
- Develop a cooperative marketing program for industry to enhance impact.
- Secure a GVRT based event that drives visitation and exposure.
- Form partnerships with the broader cycle industry to leverage their networks.

These initiatives will cost approximately \$1.7million to implement in their entirety, but will deliver a collective uplift in visitor spend worth \$8.6million and a total economic output of \$15million.

FUNDING AND ADVOCACY

The recommendations noted in this strategy point to the need for significant investment from the Council Partners. Outcomes will be optimised by considering where local efforts can be supplemented by State and Federal funding to accelerate implementation. As such, Council Partners must work together to identify appropriate cooperative funding opportunities and develop a coordinated advocacy effort around common trail priorities.

1. INTRODUCTION

The Great Victorian Rail Trail (GVRT) is a 134km recreational trail that follows the old railway line from Tallarook to Mansfield with a spur line to Alexandra. The trail encompasses a wide geographic area crossing three different municipalities - Mansfield, Murrindindi and Mitchell shires. Launching in 2012, the GVRT is the longest rail trail in Victoria and one of the longest trails of its kind in Australia.

The GVRT is seen as a key tourism asset with the potential to become an iconic tourism product if properly developed and activated. To this effect, the three councils associated with the trail (the 'Council Partners') have commissioned the development of a strategic plan that will provide a blueprint for growth of the GVRT and support it in reaching its full tourism potential.

This project has incorporated a range of stages, starting with a review of all the previous strategic documents developed in association with the rail trail, along with an assessment of current trail agreements and marketing efforts. This was complemented by consideration of the current strategic context and competitive context in which the trail operates.

In conjunction with this, a comprehensive body of fieldwork was delivered that included a physical audit of the trail that assessed the ride experience through a consumer lens, and engagement with key GVRT stakeholders to determine key challenges and opportunities impacting growth.

The *Great Victorian Rail Trail Strategic Development Plan* has been developed in response to these learnings, market insights and visitor trends, identifying the short to long term actions required to transition the trail from a simple asset to a premium tourism experience.

Tourism North East (TNE) in conjunction with Urban Enterprise have been appointed to deliver this body of work. Both entities have strong tourism and development skill-set and significant experience with the GVRT and broader regional offering, so are well positioned to identify the greatest opportunities for trail growth.

For TNE, current work with the GVRT includes the delivery of content management services for its website and social media channels, and delivery of a Ride High Country regional cycle tourism marketing campaign that includes GVRT investment and exposure – tasks that it delivers in association with its role as the regional tourism board for North East Victoria. While this ensures that TNE is knowledgeable about the trail, its users and associated stakeholders, it does create a conflict of interest with several recommendations noted in this strategy. TNE has acknowledged this conflict from the commencement of the project, and been transparent with Mansfield, Mitchell and Murrindindi Shire Councils at all stages of strategy development.



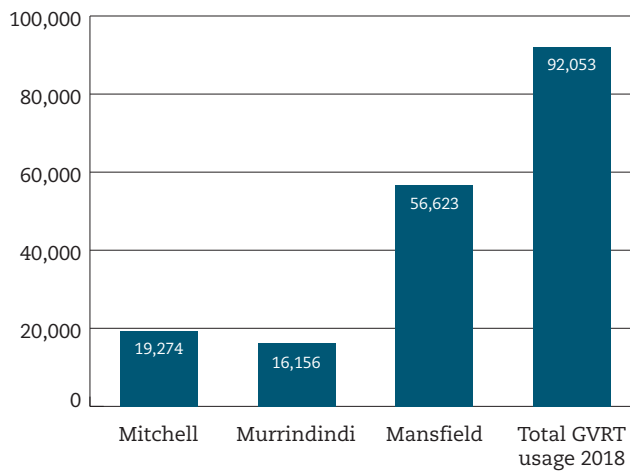
2. TRAIL PERFORMANCE

2.1 CURRENT RAIL TRAIL USAGE

Counters located along the GVRT allow for the tracking of trail usage. In 2018, the trail was used by 92,053 people, including both visitors and local residents. Mansfield Shire accounted for 61.5% of this usage, while Mitchell Shire received 21% of visitation and Murrindindi Shire attracted 17.5%.

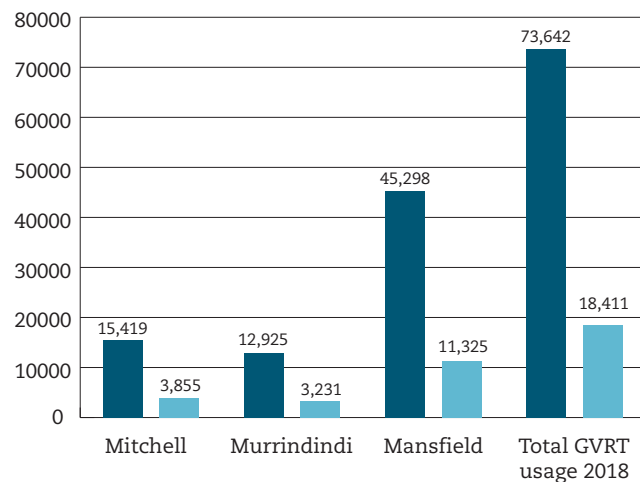
While trail counters provide an overview of usage trends, they do not distinguish between resident and genuine visitor use. Drawing on previous surveys conducted across the rail trails located in-region, overlaid with State and nationwide data associated with sports participation (like through the Australian Bureau of Statistics), it has been determined that residents account for 20% of GVRT usage. This means that the GVRT currently attracts a visitor base of nearly 74k users.

Figure 1: Trail Usage by LGA



Source: Trail counts provided by Mitchell, Murrindindi and Mansfield Shires, analysis by Urban Enterprise, 2019.

Figure 2: GVRT Users – Visitors vs Residents

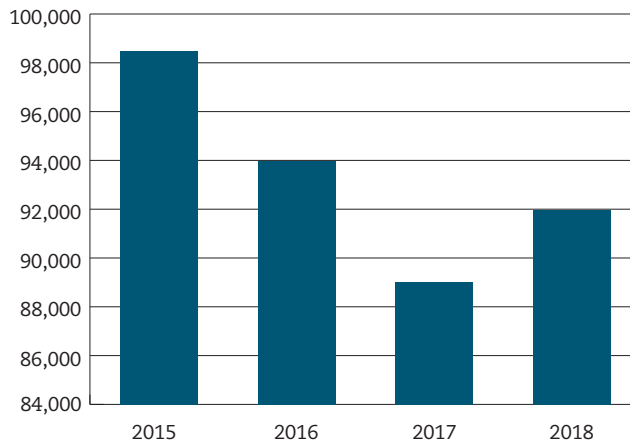


Source: Trail counts provided by Mitchell, Murrindindi and Mansfield Shires, analysis and modelling by Urban Enterprise, 2019.

2.2 HISTORIC USAGE TRENDS

Trail counters have been available on the trail since 2015, which allows for analysis of year-on-year usage. As depicted in the below graph, usage of the trail has largely declined as a result of lack of trail activation and coordinated marketing effort. Some growth has been experienced in 2018, which is likely from the trail being profiled in a \$1.2 million regional cycle tourism campaign – the only new factor introduced in association with the trail during this period.

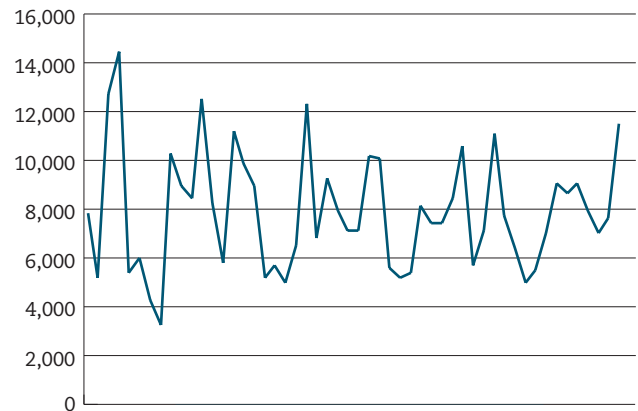
Figure 3: GVRT YOY Total Trail Usage



Source: Trail counts provided by Mitchell, Murrindindi and Mansfield Shires, analysis by Tourism North East 2019.

Trail counters also demonstrate the usage is highly seasonal with peak visitation occurring in autumn, particularly in association with the Easter break, and summer around the Christmas/New Year holiday period. Usage then tends to decline in February, which is reflective of broader regional tourism trends, and then again over winter when the weather may not be as conducive to outdoor activity.

Figure 4: GVRT Trail Usage: Jan 2015 – April 2019



Source: Trail counts provided by Mitchell, Murrindindi and Mansfield Shires, analysis by Urban Enterprise, 2019.

2.3 COMPETITIVE ASSESSMENT

It is important to understand how usage of the GVRT compares to other Victorian rail trails of a similar length. Of all benchmarked trails, the GVRT is the longest (134km), with the closest trail in length being the Murray to Mountains Rail Trail (116km). Despite its length and coverage of three LGAs, the GVRT only receives 92,053 visitors per annum, compared to the Murray to Mountain Rail Trail which receives 315,442.

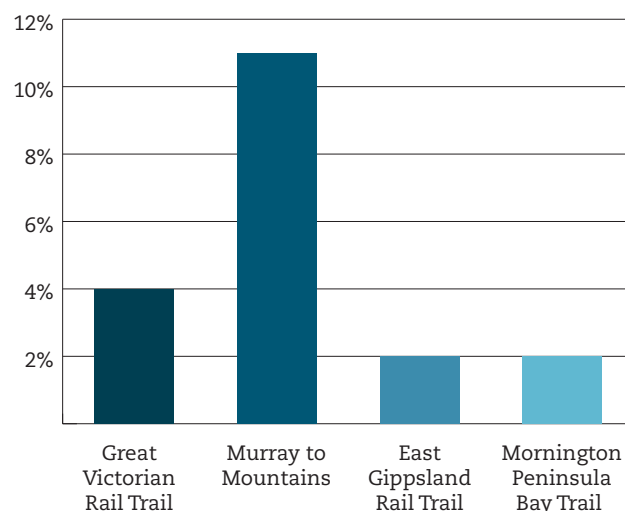
Figure 5: GVRT Benchmarking Against Other Trails

	Great Victorian Rail Trail	Murray to Mountains	East Gippsland Rail Trail	Mornington Peninsula Bay Trail
Trail Length	134km	116km	111km	100km
LGA	Mitchell Murrindindi Mansfield	Wangaratta Alpine Indigo	East Gippsland	Mornington Peninsula
Total Rail Trail Users	92,053	315,442	22,488	128,500
Residents	18,411	63,088	1,488	23,500
Visitors	73,642	252,354	21,000	105,000

The GVRT captures a significantly lower proportion of visitors than the Murray to Mountains Rail Trail (4% and 11% respectively). This is likely due to the greater amount of tourism product along the length of the Murray to Mountains Rail Trail, as well as each LGA the trail passes through having a range of high-quality visitor experiences to attract visitors.

This competitive overview points to the potential for the GVRT, particularly in comparison the Murray to Mountains – a rail trail located in the same region for which there is strong demand that could be similarly harnessed for this alternate yet complementary trail experience.

Figure 6: Rail Trail Visitors as a Proportion of Total Visitors



Source: Urban Enterprise, 2019

3. INDUSTRY BENCHMARKING

When considering the future of the GVRT it is important to understand the factors required to establish a trail as a premium tourism experience. A review of successful rail trails globally provides key insights in this regard, as illustrated by the following case studies:

A. THE OTAGO CENTRAL RAIL TRAIL

The Otago Central Rail Trail (OCRT) in New Zealand is similar in length and surface to the GVRT. It is a 152km recreational trail that follows the former Otago Central railway line between Middlemarch and Clyde. The Trail traverses the region's isolated, unique heartland and takes people to places preserved by the dry climate and distinct seasons, not easily accessible by any other means. It also offers connections with the rich 85-year history of the former railway line, which has significant appeal to today's visitors. Townships are spread along the trail with distances between rest stops ranging from 7km to 27km, providing natural hubs and service centres.

Trail users are mostly cyclists along with some walkers and horse riders. Over 15,000 complete the entire trail per year, with an additional 80,000 users either commuting or using the trail for short-ride recreation.

The OCRT contributes more than \$12 million to the Central Otago economy annually, creating business opportunities and revitalising small communities. The popularity of the Trail has led to substantial tourist business development in the Central Otago region providing an extensive range of cyclist support and services, catering for their accommodation, meals and transport needs. As such the OCRT significantly contributes to the improved economic well-being of the area and the communities along and near the Trail.

Figure 7: Otago Central Rail Trail, New Zealand, www.railtrail.co.nz



Source: Rail Trail .co.nz, www.railtrail.co.nz

Figure 8: Otago Central Rail Trail, New Zealand



Source: Tohu Whenua, a partnership between Manat Taonga - Ministry for Culture and Heritage, the Department of Conservation Te Papa Atawhai, Heritage New Zealand Pouhere Taonga, and the Ministry of Business, Innovation and Employment, www.tohuwhenua.nz

The features of the OCRT held in high regard by users include:

- a) Easy Access - The multiple access points and availability of services along the Trail increases accessibility for a wide range of users.
- b) Wide open vistas - The Trail meanders through “Big Sky” country, dotted with rocky peaks, creating a sense of space and freedom, complemented by panoramic views and spectacular landscapes.
- c) Rail heritage - The original supporting rail structures remains today. In particular, the Trail allows a close look at the skilled work of stonemasons who used the local Otago schist rock, shaping it into bridge abutments, piers, tunnel entrances and culverts.
- d) Land and climate - Landscapes throughout the Trail change with each season. The Otago block mountains shelter Central Otago, creating a rain-shadow producing distinct seasonal changes and experiential differences for Trail users.
- e) Host communities - Small communities that were once the heart of the railway line, still remain dotted along the length of the Trail. These revitalised communities have lost none of their charm. Old pubs, local characters with local knowledge are greatly valued and add significantly to the experience for Trail users.
- f) Tour operators - A range of tour operators service the trail, offering ‘one stop shop’ cycle adventures that are complemented by a choice of accommodation providers at each township.

In addition, the OCRT has an official website www.otagocentralrailtrail.co.nz that provides an array of detailed itineraries - from half day through to five day adventures.

Figure 9: Otago Central Rail Trail, New Zealand.



Source: New Zealand Tourism, www.newzealand.com

B. GREAT ALLEGHENY PASSAGE

Touted as ‘America’s Friendliest Long-Distance Rail Trail’, the 241km Great Allegheny Passage (GAP) soars over valleys, snakes around mountains, and skirts alongside three rivers - the Casselman, Youghiogheny, and Monongahela - on its nearly level path.

Much of the GAP is built on the abandoned grades of the Western Maryland Railway and the Pittsburgh and Lake Erie Railroad. They join at Connellsville and make up the majority of the trail between Cumberland and Pittsburgh. The trail showcases the rail heritage of the trail providing users with a mix of restored historical infrastructure like tunnels and bridges.

The GAP trail system is well-used, with total trail usage estimates ranging from 957,800 to 1,085,507 in 2017, with a mid-range estimate of 1,017,662. Economic impact studies have found that the contribution of these trail users is substantial. On average, operators estimate that nearly one-quarter (23%) of the business that they receive can be directly attributed to the existence of this biking/hiking trail.

Trail towns are spaced between 6-40km apart, with several road crossing and parking areas between each of these points. While there are other places along the trail with amenities, the 12 towns function as primary visitor stops, complete with a range of food and beverage options. These trail towns have taken advantage of the economic opportunity associated with trail visitation, transforming to provide a more inviting and memorable tourist destination.

The GAP has both general and dedicated transport and shuttle services along its entire route with a myriad of accommodation options catering to all budgets and styles. Information on booking trips or packages is all available on the GAP website (www.gaptrail.org).

Figure 10: Great Allegheny Passage, USA



Source: Adventure Cycling Association, www.adventurecycling.org

Figure 11: Great Allegheny Passage, USA



Source: Bikabout, www.bikabout.com

C. MURRAY TO MOUNTAINS

Located in North East Victoria, the Murray to Mountains Rail Trail is a recreational trail extending 116km from Wangaratta to Bright, with a side branch to Beechworth. Following the route of the former Bright railway line, the trail effectively links the popular tourist towns of Wangaratta, Beechworth, Rutherglen, Bright and Myrtleford.

The Murray to Mountains is considered the premier rail trail in Victoria. This is reflective of both its trail surface – which is sealed and therefore accessible by all bicycle and ride types – along with the tourism experiences offered along the trail. This includes a broad range of businesses located directly on the trail like wineries, cafes, pubs and farm gates, along with striking natural vistas that range from snow-capped mountains to sweeping farmlands.

Towns are spread along the trail creating options for half day to multi-day itineraries including complementary activities in and around the major townships. Several operators provide guided tours ranging from family friendly through to gourmet cycle escapes. For self-guided riders, a dedicated bike shuttle including bike hire provides pick-up and drop-off services.

Figure 12: Murray to Mountains Rail Trail



Source: Tourism North East

Figure 13: Murray to Mountains Rail Trail



Source: Tourism North East

The trail experience is heightened with cohesive branding and connection to the historic rail line with features including old station signage and themed rest stops to mimic the original station platforms.

Information on tour operators, things to see and do and suggested itineraries are available on the region's dedicated cycle tourism website www.ridehighcounry.com.au.

In terms of trail governance, the Murray to Mountains was initially developed and overseen by an independent management committee. However, in the years after trail launch, the tasks associated with its ongoing management and promotion were increasingly being managed by other organisations – particularly the three LGAs directly associated with it – meaning that the role of the management committee became redundant. With this in mind, it was dissolved and replaced with a strategic direction group that included CEO and Councillor representation from each partner LGA to keep trail development at a senior and strategic level in support of the hero tourism product.

3.2 CRITICAL SUCCESS FACTORS

As assessment of best practice rail trail case studies shows a commonality around a range of factors that can be considered as crucial to success in this space:

- Trails connect thriving tourism towns – These create natural hubs and rest points along the trail that are well positioned to cater for visitor needs with plenty to see and do. They allow visitors to engage with locals for an authentic experience, and immerse themselves in the destination’s culture, which is a major focus for people undertaking regional holidays.
 - Picturesque and varied landscapes – Leading recreational trails are surrounded by striking and varied natural landscapes that range from sweeping grasslands and rivers, to boulder fields and imposing mountains, which provide points of interest and sustains engagement.
 - Plentiful accommodation – Premium rail trail experiences are supported by a broad range of accommodation that caters for all budgets and interests. Accommodation types include hotels, motels, campsites and self-contained units, through to luxury holiday rentals and resorts.
 - Cohesive partnerships and packaging – Townships along key rail trails have activated around that tourism experience, partnering with other businesses to economically leverage the trail as well as deliver a seamless visitor experience. They value the trail and proactively look to drive growth and business opportunities associated with it.
 - Range of food and beverage options – Premium trails provide users with easy access to a range of food and beverage outlets that suit any taste or budget.
 - Wide variety of tour and transport options - Hire and tour options ranging from half-day to multi-day allow new visitors to explore the trail and region without substantial planning or investment in equipment. Services are also flexible and personalised to suit the needs of visitors.
 - Trails celebrate rich history – Successful rail trails actively celebrate their history – both that directly associated with the railway and other cultural and historical connections along the way. This creates points of interest, which includes restored sites that provide pause-points along the trail.
- Cohesive branding and brand story – Leading trails have a strong and recognisable brand that celebrates the uniqueness of the trail and secures an ownable position in the mind of the consumer.
- Understanding what makes rail trails successful will guide the recommendations of this plan, and also provide context for the competitive environment that the GVRT is operating in.

4. TRAIL EXPERIENCE

4.1 TRAIL AUDIT

The trail audit was undertaken by one person (TNE's Cycle Tourism Industry and Product Development Manager) who rode the entire length of the trail and assessed the GVRT from a consumer perspective. The audit considered components like trail quality, wayfinding, ride experience (things to see/do, highlights, points of interest), interpretation, public amenities (toilets, water, rest stops), commercial operators along the trail, safety and experience continuity.

Some key findings of the trail audit are as follows:

- **Trail surface in good condition**

The GVRT's trail surface is a combination of chert gravel and granitic sand, and easily rideable on either a gravel, touring, hybrid or mountain bike. The surface of the GVRT is in a good to excellent condition for the majority of the trail, with no significant obstructions (potholes, ruts), overhanging branches or vegetation encroachment, offering an enjoyable ride with little sustained climbing (Fig 14). Only small sections of the trail showed signs of weeds that would take minimal work to rectify (Fig 15).

The trail is wide and largely consistent, and while a sealed surface would increase its accessibility, it is by no means flagged as an immediate priority for this offering.

Figure 14: Trail surface was in good to excellent condition for the majority of the trail.



Figure 15: Only in a few isolated parts of the trail such as this section in Merton require attention.



- **Lack of sustained features and points of interest**

The GVRT offers a peaceful ride that traverses amazing countryside, and provides views of Lake Eildon and the Goulburn River. While the ride is enjoyable, it does not offer variety or points of interest to keep the rider engaged and motivated to ride it in its entirety. More regular features and opportunities for engagement would significantly lift the offering and ride experience.

Of the features that do exist, there is a lack of information that provides context for the offering, or effectively capitalises on the heritage associated with the railway, local towns or indigenous history.

- **Lack of connectivity between the townships and the trail**

In many cases, it is difficult to find the GVRT trail heads, with poor connection between the trail and major townships. Once on the trail, there is limited signage pointing users back into the major towns. In some instances, this means that riders pass within metres of applicable services without even knowing that they are there. Considering that the townships are the key stopping points for the trail, this is problematic for riders unfamiliar with the area.

- **Sections of the trail shared with vehicles**

Surprisingly, several sections of the trail were shared with vehicular traffic. This was not highlighted in any of the information panels or mentioned when discussing the trail with information staff. While shared trails are common, they are well signed and the rider is cognisant of the fact prior to joining them.

The sections of shared trail along the GVRT are sporadic, sometimes only sharing a vehicular driveway for a short distance but without adequate warning, a rider would be unaware that they may be approached by a moving motor vehicle. The most significant and dangerous section is Meyland Lane, Kanumbra which stretches for over 1km and is not marked clearly as shared use. The other significant shared use section is The Old Goulburn Valley Highway, Homewood, where the trail terminates for 500m, and riders are sent onto the roadway for 500m. While this road section is seldom used by vehicular traffic, it is disconcerting for a rider unaware of these on road diversions.

- **Good Public Amenities**

Public amenities were numerous and adequately spaced along the trail between townships. Toilets were clean and accessible and rest stops - whilst uninspiring - were situated in prominent trail locations (lookouts, points of interest etc). With several townships along the trail, access to drinking water and supplies was not a concern. The rest stops would benefit from the addition of information panels and/or play equipment to add to the experience of riding the trail.

- **Lack of business activation**

Using the GVRT website to plan the ride, the accommodation offer was substantial in Mansfield although in other major townships, Alexandra and Yea, there was minimal choice. Planning to finish in Tallarook, there was no accommodation offer apparent. The lack of advertised accommodation, and having to individually book each location did not promote an all-encompassing ride experience.

Beyond the main town centres, there was one operator, the Schoolhouse Gallery, servicing the trail directly (signage and trail frontage). Other commercial operators that would add to the trail experience, such as Kerrisdale Mountain Railway and Museum and Alexandra Timber Tramway and Museum, are only open a select number of days a year and were closed during the audit. Other operators in smaller townships that the trail passed through were only visited by chance (i.e. the rider needed a snack and went looking) rather than any true advertising to trail users.

Booking a return shuttle from Tallarook to Mansfield was only possible through one operator who, since completing the audit, has ceased operation.

- **Lack of Signage**

In 2013, the Council Partners commissioned the delivery of the *Great Victorian Rail Trail Signage Plan*, a comprehensive document that considered both the wayfinding and interpretive signage required along the trail. This strategy recommended a five-phase signage implementation plan, with the first four phases focused on new signage and the fifth stage looking at the replacement of existing signage. This strategy also pointed to the need for signage in key townships to assist with trailhead access. This project in its entirety was scoped at nearly \$2million - \$1million for new signage and \$915k to replace existing signage.

Having audited the trail, it appears that only stage one was implemented, which involved the implementation of the large trailheads featured in major hubs (see below images), supported by emergency markers designed to pinpoint the exact location of the trail user in case of emergency.

Failure to implement the other stages of the strategy has resulted in two key issues:

- A lack of wayfinding signage that points to commercially leverageable opportunities including places to buy meals or snacks, enjoy retail and activity-based opportunities or access the closest accommodation.
- A lack of interpretive signage means that points of interest (current and potential) along the trail are not showcased, impacting the trail experience. Indeed, the trail audit found that key trail features including the Cheviot Tunnel (northern entrance) Lake Eildon and the Goulburn River, were not accompanied by any signage.

Outside of stage one of the signage strategy, some ad hoc signage has been placed along the trail with the most prevalent being the Code of Conduct. These signs appear intermittently along the trail but are all carrying the old trail name – Goulburn River High Country Rail Trail – which is confusing for the consumer and fails to build equity for the current brand. Furthermore, these signs feature a long list of rules in a small font that are unlikely to be read, making them somewhat redundant.

Location (old station) signage appears at points on the trail but are placed on 10-foot poles, which is odd and failing to provide a cohesive user experience.

Irregular distance markers also appear along the length of the trail, taking one of three different formats:

- White distance markers that fail to indicate where the distance is measured from/to (ie/ they just say '60km') or provide any information on how frequently they will appear. They are also small and easy to miss.
- On select ESTA pylons there are panels identifying the distance to next town markers but they are very small and at knee height. Cyclists need to stop riding in order to read them.
- Blue '5km to next town' signs that are a good size, clear and the most useful of all the distance markers but only when available.

This lack of continuity for distance markers is confusing and impacting the trail's ability to offer a seamless and safe experience.

Figure 16: Trailhead signage at major townships



Figure 17: Features with no signage and inappropriate signage on trail.

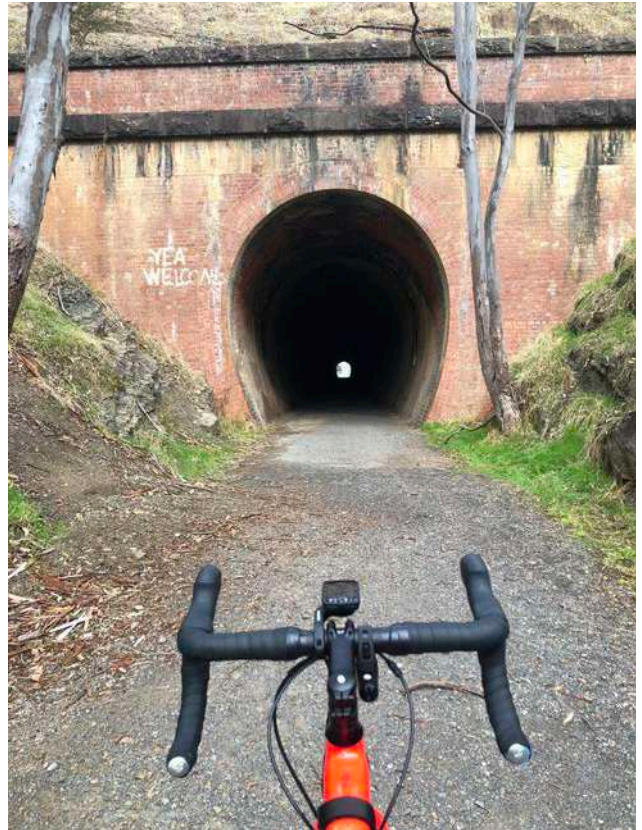
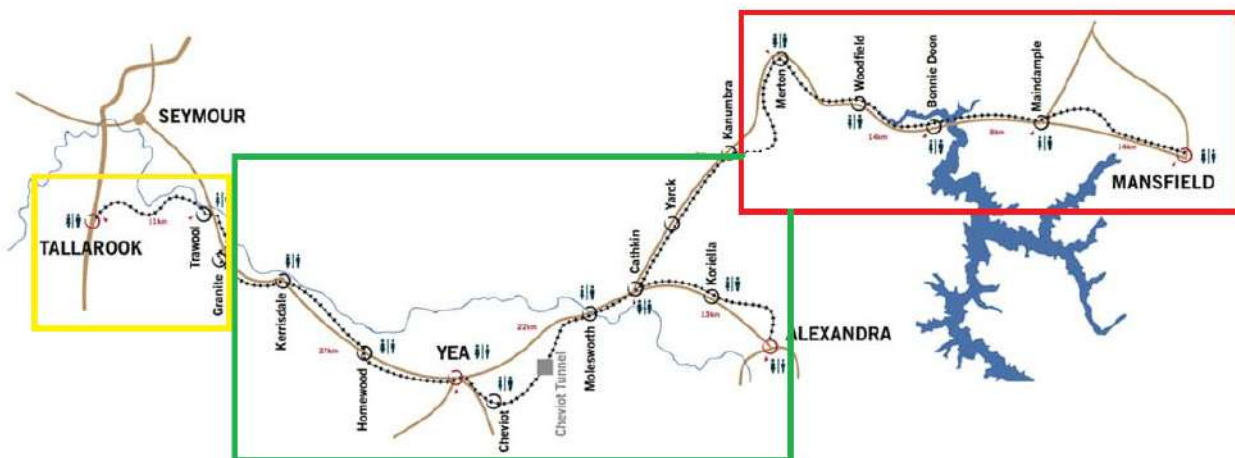


Figure 18: Varying types of distance markers on trail



4.2 LGA SPECIFIC TRAIL ASSESSMENT

The trail traverses three different Local Government Areas, with the largest portion being in Murrindindi Shire (74km), followed by Mansfield Shire (36km) and then Mitchell Shire (24km).



While the previous key findings relate to the entirety of the trail, some LGA-specific considerations must also be noted:

a. Mansfield to Merton – Mansfield Shire

Locating and safely accessing the trailhead from centre of town (roundabout/toilet block) was not intuitive. There was little information in the town centre to direct users to the information centre and trailhead.

Once on the trail, there are numerous road and driveway crossings, with ‘safety chicanes’ and gates that are not easily negotiable by bike. Many have been bypassed with unofficial routes to make the ride easier. These safety measures are only in Mansfield Shire, and repeated along the entire length of this section of the trail.

Throughout all the townships, there is a lack of arrival experience and access to town centres - i.e. Bonnie Doon. No signage or information is available on the trail to inform users that they have arrived in a town, or where facilities are located (Fig 19). Operators and residents on the trail have made an effort to fill this void and connect, but when not regulated it can cause more harm than good. Of particular note is the unofficial stop at Maindample. (Fig 20)

b. Kanumbra to Granite via Alexandra – Murrindindi Shire

Similarly to Mansfield, there is a lack of arrival experience at townships and access to town centres; and the route from the Alexandra trailhead to town was not well marked. Once in town, there was no evidence that the trail even serviced the township.

It was surprising that there were several sections of trail that were shared use with motor vehicles. Where the trail joins Meyland Lane it does not indicate that it is a shared use zone with vehicles. There was also a dangerous crossing of Goulburn Valley Highway at Kerrisdale. The downhill trail opens onto a narrow roadside stop that can easily send riders onto the roadway and oncoming traffic.

Given the feature rich section of trail, there are several features not properly showcased. i.e. Cheviot Tunnel approach from northern end, the ‘Turntable’ and Old Homewood Station. These historic locations were almost missed given the lack of information available on-site. There is also an opportunity to activate the Kerrisdale Mountain Railway and Alexandra Timber Tramway and Museum with opening hours as part of the GVRT experience.

Figure 19: Lack of welcome and informational signage at Bonnie Doon.



Figure 20: Unmaintained unofficial stop in Maindample



Figure 21: Scenic stop overlooking Cathedral Ranges with no information or signage.



c. Trawool to Tallarook – Mitchell Shire

While this section of the GVRT is the shortest, for the most part it runs parallel with the Goulburn River, which is a key natural asset for the Shire. However, at no stage is the River accessible from the trail, meaning users constantly glimpse the waterway but cannot truly enjoy it.

This section of the trail is picturesque, however the lack of supporting infrastructure, places to stop, viewpoints, etc, limits the points of interest.

Arriving in Tallarook, the trailhead terminates with no indication there is a general store and pub up just up the road, making for a very underwhelming finish to a 134km ride.

Figure 22: The Goulburn River is a key natural feature but not easily accessible



5. TRAIL GOVERNANCE

5.1 GOVERNANCE BACKGROUND

A comprehensive governance framework was established in 2012 to oversee the development, construction and commissioning of the GVRT, which included three key components – a Rail Trail Advisory Committee and two sub-committees. The terms of reference for each of these groups was defined and agreed to in a memorandum of understanding between the three Council Partners.

The Rail Trail Advisory Committee was charged with guiding and informing trail management, maintenance, development and promotion. Membership comprised of one Councillor, community and business representative from each LGA, who all sat on the Committee in a voting capacity. All LGAs also had a CEO (or CEO delegate) also sitting on the Committee in a non-voting capacity.

The Committee was then supported by a Marketing Sub-committee responsible for delivering trail marketing and promotion, and a Technical Sub-committee that advised on all operational matters pertaining to the physical trail.

In 2014, this governance framework was amended. The Rail Trail Advisory Committee was dissolved as the trail was implemented and the tasks that it was charged with overseeing were largely being managed by the councils, so it was deemed redundant.

In its place, an Implementation Advisory Network was to be developed to provide interested community and business members (like those that sat on the initial Committee) with a platform through which to contribute to ongoing trail development. This included providing advice to councils, sharing ideas and developing community/business led networks and initiatives.

The Advisory Network planned to meet twice a year with meetings attended by the Mayor and CEO (or delegate) from each partner LGA, while the Marketing and Technical sub-committees were to be maintained.

While the Council Partners agreed to form this Network, it did not eventuate. In its place, community and business representatives formed a 'Friends of the Great Victorian Rail Trail' group to continue discussions about the trail outside of the LGA framework.

Currently, the only formalised group that meets in relation to the GVRT is a marketing committee, which includes tourism/economic development representatives from each of the partner councils.

5.2 GOVERNANCE ASSESSMENT

The initial governance structure that was established to implement the rail trail was robust, balancing strategic oversight with operational deliverables. Importantly, from a council perspective it included senior level buy-in, with both CEOs and Councillors sitting at the table as key decision makers. The current lack of senior involvement with the trail has limited the ability to set and follow a strategic trail vision, and collectively pursue strategic tourism opportunities.

Additional issues have also resulted from changes in engagement with community and business representatives, who were initially involved in key decisions associated with the trail but have now been marginalised. The lack of a formal process for engagement has left a passionate group with no outlet. Even from a business perspective, there is a clear need for engagement and collaboration that is currently not being met by current governance arrangements.

The scope of the current Marketing Committee – as the only joint entity that exists between the partner councils relative to the trail – is too narrow and inadequate to drive strategic trail growth into the future.

6. MARKETING ASSESSMENT

6.1 AWARENESS ISSUE

Significant consumer segmentation research conducted across the region has shown that the primary issue inhibiting tourism growth is lack of awareness. This lack of awareness or knowledge gap about the offering presents a risk of the unknown for potential visitors – the risk of committing their time and money to an experience that may not satisfy the needs of the travel party.

Cycle-specific consumer research illustrates that this is a significant issue for the GVRT. This research considered the perceptions and awareness level of active rail trail participants, who already identified as rail trail riders who enjoy these types of trails, and rail trail considerers, for whom the rail trail offering was appealing but they were not actively involved in rail trail riding.

This research demonstrated that that 37% of rail trail participants – a core market for the trail – had no awareness of the GVRT. Among rail trail considerers, 60% of the market had zero awareness about the trail.

Lack of awareness can be addressed with a targeted and sustained marketing effort that is capable of building recall and recognition, and inspiring visitation.

6.2 MARKETING BUDGET

The *Goulburn River High Country Rail Trail Management Plan* (2011) establishes a management framework for the trail supported by the Council Partners. This Plan defines the collective marketing budget for the GVRT – a \$10k annual commitment from each council per annum, delivering a total marketing budget of \$30k.

At present, \$20k of this allocation is committed to the Mansfield Visitor Information Centre providing related services for the trail (see item 7 for further detail), leaving a \$10k budget for marketing.

However, marketing efforts designed to drive awareness and ultimately inspire conversion need to be of a certain scale to have impact, which is costly. As a standalone budget, \$10k is not adequate to support an independent marketing program capable of influencing visitation trends.

In the last two years, the Marketing Sub-Committee has looked to grow its marketing reach through investing this \$10k in the regional *Ride High Country* cycle tourism campaign delivered by TNE. As of 2018/19, this program has a four-year marketing budget of \$4.4 million, which ensures this GVRT buy-in has been significantly amplified, leveraging a far bigger marketing spend.

6.3 MARKETING ACTIVITIES

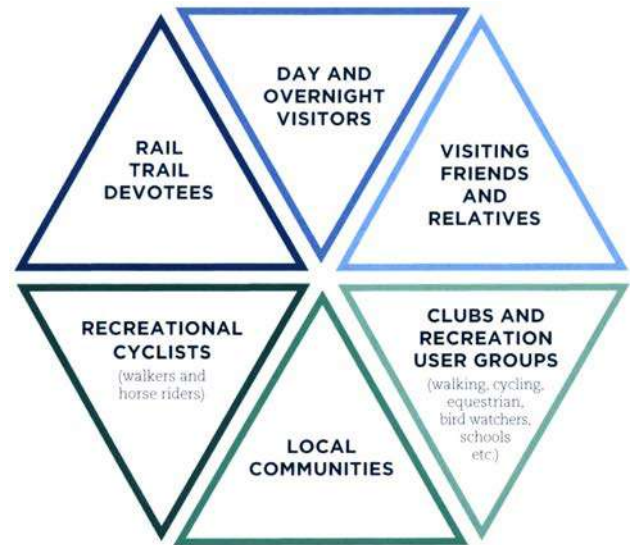
A number of documents have been developed to guide GVRT marketing efforts, with the most robust being the 2013 *Great Victorian Rail Trail Strategic Plan*, which identifies a range of actions required to drive trail growth.

As assessment of marketing activities delivered over the years shows that some effort has been made to deliver on the actions outlined in this document, however this work has been largely ad hoc and restricted by available budget.

Of those initiatives that have been delivered, some have focused on driving awareness and demand like print advertising in cycle titles and PR, however the majority of activity has focused on promoting to the consumer when they are in a major township. Meeting consumers' information needs while in-region is important, however it does not fulfil the primary marketing requirement of generating awareness and demand for the offering within core visitor markets (out of region).

A review of a range of strategic documents shows that the target segments considered via these marketing efforts have been poorly defined and far too general to be effective. This is not the fault of strategy authors but rather a lack of available research that has allowed for effective marketing insight. However, with a limited budget it is essential that all marketing activities are highly targeted, focusing on consumer segments that are engaged and high-yielding to deliver a strong return on investment.

Figure 23: Current Target Markets



Source: *Great Victorian Rail Trail Brand Style Guide 2013*

6.4 BRAND

When the rail trail was first launched it was called the Goulburn River High Country Rail Trail but was later renamed the Great Victorian Rail Trail, accompanied by a new brand identity.

The font reflects the historical railway station nameboards, the double parallels lines represents the railway track, and the bike is linked to the major tourism experience associated with the trail.

The new identity was supported by a comprehensive brand style guide that defined the positioning statement for the brand as 'create your own stories' and included a range of clear and engaging templates for brand application.

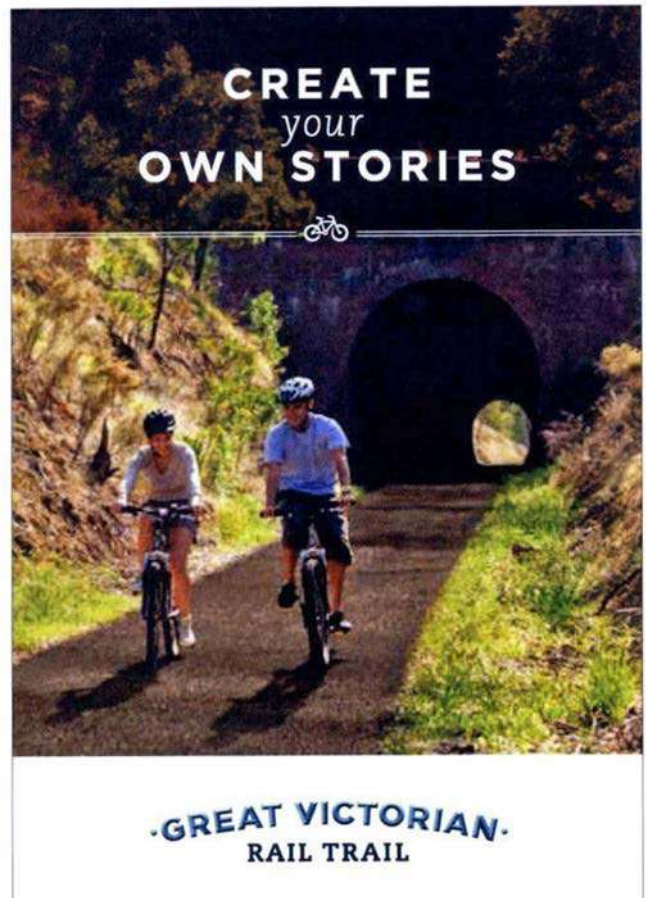


Figure 24: GVRT Brand Executions

Source: Great Victorian Rail Trail Brand Style Guide 2013

EXPLORE & DISCOVER
Us mi, cumente mpoiest parunt excepta set dus, corpoi inusciis et fugham que expies etiat remit, ut aut dolores ctitisciae aut vent quibus quo liquis neuno.

GREAT VICTORIA
 [Text in Latin describing Great Victoria]

ATTRACTIONS
 [Text in Latin describing Attractions]

DISCOVER
 [Text in Latin describing Discover]

OTHER THINGS TO SEE & DO
 • [List of activities in Latin]

GREAT VICTORIA
 [Text in Latin describing Great Victoria]

ATTRACTIONS
 [Text in Latin describing Attractions]

"Us mi, cumente mpoiest parunt excepta seto dus, corpoi the inusciis et fugham que et expies etiat remit, but autem aut dolores ctitisciae aut vent bus liquis neuno."

EMBARK on a GREAT ADVENTURE

.GREAT VICTORIAN. RAIL TRAIL

CREATE your OWN STORIES

.GREAT VICTORIAN. RAIL TRAIL

The use of 'Great Victorian' in the trail name suggests category ownership, and is aspirational in the mind of the user, so is considered to be strong and suitable to lead future growth of the trail. However, careful consideration needs to be given to the trail's claim to greatness. When launched, the trail's key positioning was that it was the longest continuous rail trail in Australia – a title that has now been surpassed by other trails (like the 161km Brisbane Valley Rail Trail) and is likely to be further challenged by proposed rail trail developments throughout the country. It is still the longest in Victoria but its needs to offer a more robust tourism experience to truly realise its position as a market leading rail trail offering.

In a similar vein, the 'create your own stories' positioning is emotive with broad appeal, suggesting that riders will be able to craft and enjoy their own, personalised rail trail experience. Again, this is a strong statement however there are limited tourism opportunities along the trail that supports the concept of a visitor choosing their own adventure. In terms of a way forward, either the trail experience needs to evolve to support the positioning, or the positioning statement needs to change to better align with the on the ground experience offered by the trail.

The GVRT brand is largely a wordmark that easily adapts to a range of channels and executions. It is fairly traditional, visually pointing to the railway heritage of the trail, and could perhaps do with some revamping to make it a bit more contemporary. However, when considered against other trail priorities, a brand review would be a longer term proposition.

Another key issue has been the management of the brand, which has been limited to date meaning that a range of entities have been using it in conjunction with their own collateral and operations in a way that is damaging brand equity.

Figure 25: Externally Produced GVRT Collateral



Source: Alexandra Newspapers

7. GVRT VISITOR SERVICING AGREEMENT

7.1 AGREEMENT OVERVIEW

Of the \$30k that Council Partners commit to marketing the trail, \$20k is paid to the Mansfield Visitor Information Centre to provide visitor and business services along the length of the trail.

More specifically, this includes:

- Answering the 1800TRAIL phone number established to service GVRT specific enquiries
- Responding to emails received via the info@greatvictorianrail.com.au address
- Receiving any maintenance requests associated with the trail and forwarding them to the appropriate LGA
- Managing the GVRT website and social media content
- Distributing GVRT merchandise
- Distributing GVRT collateral
- Forwarding media enquiries to Council Partners
- Encouraging/facilitating business listings associated with the GVRT website
- Providing business mentoring to operators associated with the GVRT

7.2 VISITOR SERVICING ASSESSMENT

The majority of the tasks commissioned under this agreement cover the standard deliverables of any visitor information centre, particularly answering visitor calls and emails, distributing collateral, selling merchandise and driving uptake of business listings. Forwarding phone calls and enquiries to other parties, whether they be media or operational issues, also comfortably sits within the visitor information centre remit.

Only two tasks require a specific skill-set and unique deliverables - content management, which is currently outsourced to TNE for \$5k - and business mentoring, which the Visitor Information Centre is not equipped to deliver in a meaningful way.

As such, this service is failing to deliver adequate return on investment and is impacting the limited budget currently available to activate the trail.

8. BUSINESS ENGAGEMENT

8.1 BUSINESS CLUSTERS

Tourism businesses along the GVRT have been mapped by Urban Enterprise. This includes businesses directly along the GVRT, as well as those within 1km of the trail and within the key townships of Mansfield, Alexandra and Yea.

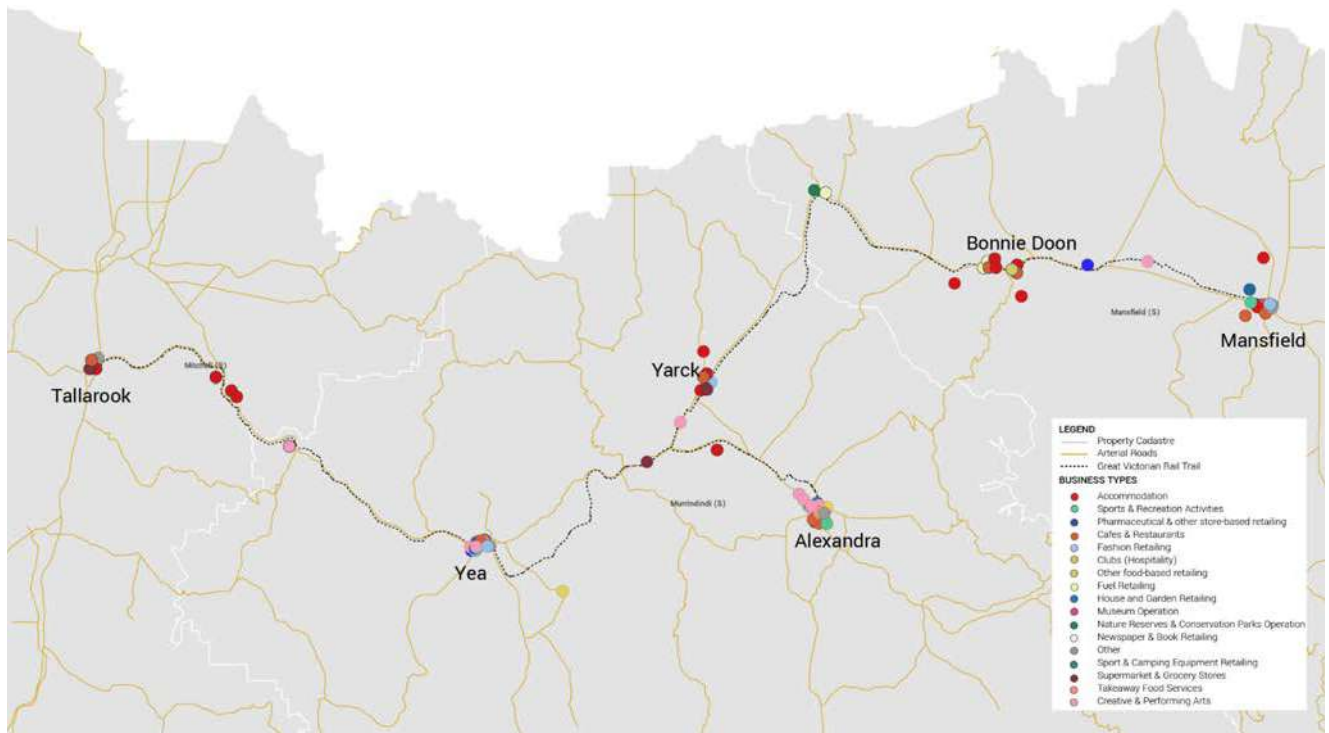
Tourism businesses have been retrieved from the Australian Business Register (ABR) and have been categorised using the Australian Bureau of Statistic's Tourism Industry Correspondence. Business categories have been classified according to product or service type.

This mapping shows the spread of tourism businesses along the GVRT, highlighting that businesses are contained to the main towns of Yea, Alexandra and Mansfield. Between major townships, there is a lack of tourism product and experiences, with most of the businesses between the key towns being low-quality, small-scale accommodation establishments or self-contained accommodation.

Of particular note along the various lengths of the trail:

- TALLAROOK TO YEA - There is one food and beverage business along the trail between Tallarook and Yea (the Schoolhouse Gallery), which is over 40km, and equivalent to over 2-hours of cycling. Most of the tourism product between Tallarook and Yea is small-scale accommodation, as well as the Kerrisdale Mountain Railway and Museum. However, it is worth noting that a revamped Trawool Estate will open in November 2019, assisting with this offering. This length of the trail is particularly picturesque, and the views and natural landscape are not being properly capitalised through trail activation and tourism product offerings.
- YEA TO YARCK/ALEXANDRA - There are very few businesses on the trail length between Yea-Yarck and Yea-Alexandra. The businesses between these areas include an accommodation provider and a small scale grocery/general store.

Figure 26: Business Clusters



Source: Urban Enterprise, 2019.

- YARCK TO BONNIE DOON - There is almost no tourism product between Yarck and Bonnie Doon - only a small nature-reserve and a petrol station. The rest of the businesses are clustered in Yarck and Bonnie Doon, which include mainly self-contained accommodation establishments as well as a few caravan and camping parks in Bonnie Doon.
- BONNIE DOON TO MANSFIELD - 61.5% of visitation to the GVRT occurs within Mansfield Shire, with much of the tourism product clustered in Bonnie Doon and Mansfield. The stretch of trail between Mansfield and Bonnie Doon is relatively short compared to other lengths of the trail, with user needs adequately met by these townships.

8.2 BUSINESS SENTIMENT

Stakeholder consultation sessions were held in the key townships servicing the GVRT to engage with community and business groups relevant to the trail. Key themes that emerged from this engagement are as follows:

- **An asset but not a key tourism driver:** Throughout the townships it was generally appreciated that the GVRT is a valuable asset to the destination and regional offer, however it has failed to deliver the tourism impact implied during its inception. As a result, it has not been a focal point for most businesses. Of those businesses that do see benefit from the trail, it was agreed that consumer engagement with it has been more by chance than attributable to marketing campaigns or prior knowledge.
 - **Lack of business collaboration:** A void of collaboration and communication was a common theme. Businesses along the trail do not engage with operators outside of their township, nor are they aware of complementary products that may be available nearby.
 - **Poor understanding of trail ownership/management:** Discussion highlighted the lack of understanding of who was behind the GVRT brand, who owned the trail and who was responsible for maintenance. This lack of knowledge led to poor interaction with the brand, with operators not knowing who to speak to, raise concerns with or suggest ideas. The lack of ownership and action translated to a perceived lack of care by the respective organisations managing the trail.
- Even those who were aware of the ties with Council, particularly the user groups, a lack of formalised communication was seen to be a major impediment and source of frustration. These groups felt there was a lack of coordinated effort in association with the trail and no evidence of money being spent on promotion or operation. They also flagged further implications for safety, including issues associated with the lighting of the Cheviot Tunnel, hazard reporting, water access points and fire corridors due to lack of mowing, all perceived as a lack of care by the responsible Councils.
- **Poor connection with townships:** The geographic separation of the trail from the town centre was echoed by all operators. It was reiterated that the trail has no presence in the townships and is hard to find. This lack of connection with the businesses meant they did not feel part of the GVRT brand and were all operating as individuals within their respective townships. Businesses believed that to build a connection between the town and the trail, a direct relationship was required.
 - **No marketing buy-in:** Businesses expressed a desire to be part of the GVRT brand and experience, however were unwilling to spend their own marketing dollars (for example on an ATDW listing) when there was no brand or marketing outcomes delivering them a return. All businesses wanted assistance with how to market the trail within their existing channels and to belong to a 'group' that was seen as being part of the GVRT.
 - **A need for trail focal points:** It was agreed that the existing trail features needed to be showcased, and that the history of the trail and its townships needed to be told as part of the experience via relevant interpretive signage.
 - **More trail services required:** While industry leading rail trails are supported by a range of commercial services like tours, bike hire and transport, the tourism products associated with the GVRT are very limited. Lack of transport options was raised by all townships, with only one operator (ATC Mansfield) running shuttles, and looking to cease that operation due to costs. The need for reliable bicycle transport via existing V/Line and local services was raised as a key issue needing immediate resolution for users.

9. STRATEGIC DEVELOPMENT PLAN

Drawing from the learnings and insights presented in this report thus far, a strategic development plan has been developed to capitalise on trail opportunities, mitigate challenges and define a clear path for GVRT activation.

9.1 TRAIL VISION

The Council Partners understand the value of GVRT and its potential to become a hero tourism experience if properly activated. To provide a focus for these efforts, it is essential to define the trail vision and mission – what these Council Partners and industry are collectively looking to achieve and how they are going to achieve it:

Vision Statement:

To establish the Great Victorian Rail Trail as a thriving recreational tourism experience that drives positive visitor economy outcomes for the destinations, businesses and communities associated with it.

Mission Statement:

Council Partners will collectively lead efforts to establish the Great Victorian Rail Trail as a leading tourism experience for the region. This will be achieved through acting strategically and collaboratively to evolve the visitor experience, stimulate private sector activation and promote the trail among core visitor segments.

In order to realise this vision and fulfil this mission, a range of strategic actions must be undertaken that are designed to drive positive visitation, yield and dispersal outcomes. These actions will be developed in accordance with four key themes:

- Improve and innovate the trail experience to provide a premium visitor offering
- Activate the trail with a new range of marketing leading products
- Support demand driving activities that stimulate awareness and conversion
- Foster industry engagement and collaboration to optimise positive trail outcomes

9.2 IMPROVE AND INNOVATE THE TRAIL EXPERIENCE TO PROVIDE A PREMIUM VISITOR OFFERING

Significant investment is required if the trail is to become a premium trail offering that is an effective tourism driver rather than a value-added product. A range of initiatives have been explored in accordance with this theme:

Tell the Story of Existing Sites

There are many sites along the trail that have strong and interesting links to local communities and the history of the townships, the railway and the land. Sites with existing points of interest – like old train stations, tunnels and bridges - need to be identified along the entirety of the trail. Uncovering not just the factual information about these sites but the rich stories that intersect people with place will be key in bringing them to life, and will also ensure alignment with the ‘create your own stories’ brand positioning.

These sites and stories should be curated so they take on a similar tone and style that ensures this is an integrated and holistic trail experience. Site signage should then be developed to mark these sites, rolled out across all LGAs to an agreed template to ensure cohesion.

Create Trail Features Through Artistic Installations

There are a number of sections of the trail where the landscape lacks features. In these areas, opportunity exists to develop new pause-points through the creation of artistic and interpretive installations. This includes the implementation of large-scale 'X-Factor' sculptures - high-impact, often polarising pieces that act as major tourism drivers and points of interest.

The installation of this sculptural work would deliver several additional outcomes for the GVRT:

- Position it as a world-class rail trail offering with a competitive point of difference.
- Inspire, delight and encourage talk-ability and social media shareability so as to position the GVRT as a 'must do' accessible cycling experience
- Drive repeat visitation and advocacy for the GVRT through enhancing the visitor experience.
- Attract new markets to the trail that are motivated by arts versus cycling.

These major installations could be designed by high-profile domestic or international artists if budget allows. Alternatively, local artists could be engaged to better create links with local communities and township heritage. Either way, impact must be prioritised.

TNE has engaged Oculus – specialists in landscape architecture, urban design and environmental planning – to deliver the conceptual work associated with this initiative, to illustrate what is proposed:

Figure 27: Artistic Installation Concepts Incongruous to the Landscape



Source: Oculus (2016) Game Changing Rail Trail Projects, Tourism North East

While the Oculus examples provided are bold and impactful, installations in sympathy with the landscape could also be considered, particularly those that harness the natural environment. For instance, there are some beautiful and mesmerizing sculptures that move with the wind, along with installations made out of materials that complement the natural surrounds.

Figure 28: Kinetic Wind Driven Sculptures



Source: Anthony Howe, www.howeart.net



Source: Viral Galleries, www.viralvideogallery.com



Source: Wayfair, www.wayfair.com

Figure 29:
Sculptures Inspired by the Natural Landscape



Source: James Seaman Sculpture, www.jamesseaman.com



Source: Around and About with Viv, www.viviennemackie.wordpress.com



Source: Sylvain Meyer, www.twistedsifter.com



Source: Kim Graham Studios

Alternatively, artists could be commissioned to bring icons and events of the rail heritage to life, or to showcase the rich history of the destinations and communities around the trail to again tell the GVRT story. Key to success in this space is a focus on high-impact, engaging and contemporary installations – not just static statues and plaques – that will excite and motivate trail users.

Figure 30: Sculptures that Highlight Destination History and Heritage



Source: Doctor Brian Lynch



Source: Simeon87, Wikimedia Commons



Ideally, ten installations along the trail – every 10km outside of the major townships – would elevate the trail to a signature tourism experience. It would act as a competitive differentiator unlike any other rail trail in the Australia, intersecting cycle and nature-based tourism and arts/cultural heritage.

There are also options for smaller installations that can be used to frame or highlights parts of the landscape to creating points of interest, particularly in sections of the trail that feature long, flat sections with limited natural features.

Two separate reports commissioned by TNE and Regional Development Victoria have considered the value of developing new trails in isolation compared to developing trails with these types of enhancements. This work illustrated that these installations have the ability to transform the trails they are located on, in line with international best practice, and significantly increase trail related visitation and yield.

Figure 31: Installations that Frame the Landscape



Source: Oculus (2016) *Game Changing Rail Trail Projects*, Tourism North East

SIGNAGE UPGRADE

A clear issue on the trail is the lack of signage and inadequate existing signage. As a priority, a signage plan needs to be undertaken that maps the trail and key locations for signage, prioritising the following:

- Signage that points users from the trail to towns and commercial operators
- Interpretive panels for existing features on the trail to enhance the user experience
- Consistent distance markers along the length of the trail that are at agreed intervals and that contain the same data.
- Signage that points users from major townships to the trailhead
- The removal/replacement of signage with the old brand.
- As new features are created on the trail, interpretive panels that tell their story.

It is important that this signage plan draws on and finesses the significant body of signage work already commissioned – the *Great Victorian Rail Trail Signage Plan (2013)* – to avoid duplication and unnecessary cost.

To this effect, TNE has also received funding by way of the Federal Government's Building Better Regions Fund to commission the delivery of a Ride High Country Signage Strategy for the region. This Strategy will set industry best practice for both wayfinding and interpretive signage in association with cycle tourism product, and set a template for trail signage across the High Country. Learnings from this projects relative to best practice signage can be drawn upon for the GVRT, leveraging work that is already funded and currently in progress.

GVRT DIGITAL FUNCTIONALITY

While the implementation of signage along the trail is key, it will be costly so may take time to complete in its entirety. An immediate solution to both wayfinding and interpretive elements is the development of new digital GVRT functionality that could take the form of an app or enhanced capabilities added to the existing website – whichever offers the best user outcomes in a cost-effective manner. This functionality could be used to provide a range of information to trail users:

- Effective mapping that depicts the entirety of the trail and advises people where they are and how far they are from points of interest and townships.
- A link to local businesses, identifying where people can stop for food and beverages, and the type and cost of the available offering.
- Details on points of interest – the app should provide both overviews of key focal points, along with the ability to delve into further detail if an areas if of interest to the user. This is information could be read by the user or delivered via audio to allow them to continue on their journey while listening to details about the site they had just visited.
- The ability to log trail maintenance issues directly with the appropriate council (based on their geolocation) negating the reliance on this service currently provided for Mansfield Visitor Centre.

The new functionality will also be most effective when it can represent a robust product offering in and around the trail, pointing to a concerted need for product development that supports rich digital content. It will also need to consider how to assist people in navigating the trail experience in areas where mobile coverage is limited, so offline access will be key.

It is recommended that this functionality is developed for the GVRT as opposed to having content about the trail on another entity's platform to ensure full control over content and the user experience. It is also recommended that any content related to trail businesses be linked to the ATDW listings on the GVRT website, providing added value to operators actively supporting the trail and alignment with key brand messaging.

TRAIL EXTENSION

At present, the Mitchell Shire trail head is at Tallarook, which marks a start/finish point of the trail. However, Tallarook has a small tourism product available, so offers a limited arrival experience, and only has a small population base to draw from to impact change.

An extension of the rail trail between Tallarook and Seymour would resolve this problem by establishing Seymour as the trail head. Seymour has a far bigger population and therefore service base that is capable of supporting a more robust visitor experience. Furthermore, with the Seymour Revitalisation Initiative underway, this destination is likely to benefit from increased public and private investment into the future, further enhancing its visitor servicing capability. Its proximity to the Melbourne market also provides opportunities to capture market share for the rail trail.

Engagement with key tourism businesses that attended the rail trail engagement session in Tallarook were also supportive of this concept. Rather than detracting from Tallarook it was felt that the extension would help establish the destination as a natural stopping point, boosting associated business opportunities.

While a number of trail alignment options have been identified for this extension, it is essential that the trail head is viewed through a consumer lens for the best possible tourism experience. This may mean additional cost is incurred in implementing the extension but it is important that the trailhead experience is strong, matching the level of experience that will also be supported with the proposed Station Precinct development proposed for Mansfield (see below).

MANSFIELD STATION PRECINCT DEVELOPMENT

The Mansfield Station Precinct is a 13 hectare site on the main approach to town that also marks the locations of the GVRT trail head. Mansfield Shire Council has developed a masterplan for this site that will see it become a tourism and community hub that offering an impressive arrival point for the GVRT. With new food/beverage options, bike services and even a pump track it will become a focal point for all types of cyclists in Mansfield.

As such, this initiative is fully recommended, and Mansfield Shire Council is urged to look at where GVRT recommendations can be packaged with this broader project to achieve both efficiencies and impact.

Figure 32: Mansfield Station Precinct Conceptual Design



Source: SJ Urban 2018, Mansfield Station Precinct Activation Project Concept Master Plan, Mansfield Shire Council

9.3 ACTIVATE THE TRAIL WITH A NEW RANGE OF MARKETING LEADING PRODUCTS

While improving the trail experience is key, it is important to consider ways to activate this experience through a new range of products. This delivers several key benefits:

- Creates economic activity associated with the trail, effectively leveraging the existing asset.
- Extends the reach of marketing efforts and the potential visitor base through the commercial and promotional activities of independent operators.
- Improves and diversifies the user experience.

Several initiatives have been explored under this theme:

Product EOI and Seed Funding Program

There are currently no tours or shuttles available along the GVRT, and only one bike shop (located in Mansfield). While product growth is required, there are currently several key barriers to development in this space:

- Lack of demand to warrant trail-specific services
- Lack of operator skill-set or capacity to development new products
- Lack of any business coordination along the trail to support cooperative product development
- Lack of knowledge about any tourism offering by businesses outside of key tourism hubs

In order to overcome these barriers, a proactive approach to product development is required to de-risk the opportunity for the private sector. To this effect, it is recommended that a product brief is developed that summarises the opportunity associated with providing bike hire, tours and transport in association with the GVRT, or any other products that Council Partners are looking to activate (even potentially the product adaption/packaging or GVRT event noted in this report). This should then be distributed as an expression of interest (EOI) that calls for operators who can either independently or in-conjunction with other businesses deliver one or all of these services. The EOI would be open to businesses located in and outside the GVRT region interested in offering these types of visitor experiences. This EOI should be administered by the Council Partners as a collective GVRT opportunity.

Importantly, there needs to be some level of seed funding to help establish or launch these products. Some Councils already have industry development funding programs that could be utilised for this purpose, while others have the potential to encompass this type of activity in existing or emerging destination specific tourism and development projects. With this in mind, the EOI should note a threshold for local financial support and the potential for being escalated to State Government for any major investment that may be required. This would ensure that all private sector opportunities are captured as part of this EOI, potentially pointing to a range of short to long term development opportunities.

It is recommended that the Council Partners work in conjunction with their Regional Tourism Board or Visit Victoria to ensure that any new products are mentored through the development and launch stage. These entities already offer various programs to this effect, which can provide the added assistance businesses need in their infancy to heighten potential for market success.

Product Adaptation

There are a number of businesses in close proximity to the trail that offer a product that could be adapted for the cycle tourism market, or repositioned for heightened appeal to trail users.

An ideal example of this would be existing food/beverage suppliers, who already offer hampers or take-away meals, that could provide packaged lunches/snacks of locally sourced food that could be taken on a rail trail trip.

While such a product is normally targeted at the foodie market, it could be adapted for trail users at no cost to the operator, just a re-think of applicable packaging and the ability to cool/heat products. This would be particularly useful on sections of the trail where there are limited food/beverage stops, or where the offering is currently poor.

Produce could also point to local suppliers on the trail that may be worth a small trip deviation in order to engage with.

Product Packaging

Leading rail trails present a cohesive and accessible tourism product to visitors, which often involves effective packaging. This does not necessarily require the creation of new products – just the bundling of existing products in a way that presents a seamless experience to the consumer. Packaging is effective in educating consumers about tourism experiences that they were not previously aware of, as well as providing an effective way to up-sell.

Businesses along the GVRT require the following assistance in this regard:

- They need to be informed about the range of experiences available along the trail, so they understand what products are available that may complement their own offering, and even fill current gaps.
- They must be networked with other businesses along the trail so they can establish connections with like-minded businesses.
- They need to be educated about what is involved with packaging products with other businesses (management of transactions, commissions, consumer experience etc).

Once again, this is a program that can be scoped and delivered by either the Council Partners via their economic development teams or in conjunction with their Regional Tourism Board or a contractor.

Township Audit and Revitalisation

Analysis of market leading rail trails has shown the importance of having townships located on the trails that deliver a range of accommodation and food and beverage options. While this type of development sits outside of the scope of this strategy, it must be acknowledged that greater activation of GVRT towns would lead to stronger outcomes for both the trail and tourism more broadly.

As such, it is recommended that Council Partners independently conduct an audit of the tourism offerings of their townships and prepare a gap analysis that determines where visitor needs are not being adequately met. Filling these gaps may then involve working to improve, upgrade or diversify existing businesses, or may necessitate the attraction of new businesses as part of a broader economic development or revitalisation strategy (as per Seymour’s current program).



9.4 FOSTER ENGAGEMENT AND COLLABORATION TO OPTIMISE POSITIVE TRAIL OUTCOMES

The GVRT is a long trail covering three Council Partners across a wide geographic area and diverse stakeholder base. At present, there is a lack of effective coordination at all levels, which is impacting the trail's ability to grow and thrive. Great gains can be achieved through driving collaboration and communication across all entities involved with the trail, no matter how small or significant their association is with the GVRT.

Effective Governance Framework

Good engagement and collaboration starts with having an effective governance structure in place.

The initial governance framework adopted for the GVRT was comprehensive, covering strategic and operational components associated with the trail, and providing the level of robustness required to support initial implementation. Now operational for many years, the trail still needs to be supported by an effective governance structure however not of the same scale as in the initial planning stage.

In order to activate the trail and deliver on the recommendations of this strategy it is recommended that a GVRT *Management Committee* of Council Partners is formed. This Committee will be charged with determining and pursuing strategic priorities associated with the maintenance, growth and promotion of the GVRT.

Each council will have three representatives on this Committee: the CEO, a tourism/economic development representative and an engineer/technical representative, with no proxies sent in place of members.

As the peak ride season is Summer and Autumn, the Committee will need to meet pre and post this period to both plan for and assess trail performance. Ideally, this includes meeting in:

- June to assess the performance of the trail over the financial year that is just coming to a close, and to agree to operational and strategic priorities for the coming season. Much of the work progressing or implementing said priorities will need to occur over Winter/Spring to ensure readiness for the coming trail season.
- October to report back on agreed actions and learnings from the June meeting, finalise any programs that need to be rolled out over the peak trail season, and determining any trail priorities that will need to be included in the coming Council budget cycle.

Uniting all components of trail management into the one meeting will ensure consistent GVRT priorities across and within all Council Partners. Having the CEO present at this meeting will also ensure senior endorsement for agreed priorities, coordination between council department and a reporting line back to Councillors.

Following each of these meetings, a list of agreed actions that are attributed to specific individuals will be produced and distributed to all Committee attendees to ensure clarity on expected deliverables.

GVRT Industry Groups

At present, there are user groups that are proactive and failing to be engaged, and business groups who are seeking some formalised collaboration. To address this issue, a GVRT *Industry Group* will be formed in each LGA that is open to any business or community members interested in the trail.

The Industry Groups will meet twice per year following the Management Committee meetings. They will be coordinated and facilitated by the Tourism/Economic Development representative from each Council Partner and will provide information on:

- Details on any operational matters coming out of the Management Committee meeting, including an agreed maintenance schedule.
- An overview of all marketing activity being delivered in association with the trail and opportunities for industry involvement
- Implementation and reporting against industry and product development programs
- Information on new/key cycle tourism offers along the trail (both within and outside of the given LGA)
- Opportunity for industry to provide GVRT feedback into Council pertaining to all matters associated with the trail.

Managed by Council Partners, these groups will enable Councils to take a visible leadership role in their own communities relative to trail management and development, and provide a formalised engagement structure and strategic network for industry.

Tourism/Economic Development Managers from each Council will liaise with their peers as required on key insights/learnings arising from these groups that may be shared or even coordinated along the entire trail.

GVRT Industry Communication

The Industry Groups will form the basis for a new, single GVRT stakeholder database that must be communicated with every two months (or even on a seasonal basis) to ensure they are engaged, and that the GVRT is front of mind with businesses. At a minimum, these communications should:

- Profile a tourism experience associated with the trail (directly or indirectly) to help drive awareness of the broader GVRT commercial offering.
- Provide updates on any new trail developments, either strategic or operational.
- Promote participation in the Industry Group.
- Offer marketing tips or updates that businesses can integrate into their businesses.

These communications should be co-branded by the Council Partners to reiterate trail ownership and management. The one communication should be sent to all Industry Groups for consistency and to address awareness gaps. The management of these periodic communications could be alternated between the Council Partners.

Visitor Information Centre Collaboration

It is recommended that the Visitor Servicing Agreement that the Mansfield Visitor Information Centre currently holds with the Council Partners is dissolved, which will free funding for marketing activities as per item 9.5.

In its place, greater coordination and collaboration between the Visitor Information Centres (VIC) associated with the trail would ensure that the servicing needs of trail users could still be met but in a more cost effective way as part of standard VIC operations.

The following actions are recommended in support of this direction:

- GVRT briefings are collectively delivered to these VICs twice per year to ensure there is a strong understanding of the trail and any new developments.
- A VIC representative attends the relevant GVRT Industry meeting delivered in their LGA to understand any emerging operator needs.
- Any emails sent to the info@greatvictorianrail.com.au email address are redirected to reach both the Mansfield and Yea VICs to respond to as relevant, which includes forwarding booking requests to appropriate operators.
- The GVRT phone number is disbanded with users pointed to the range of available VICs regarding their queries. Alternatively Mansfield VIC may wish to continue receiving calls on behalf of Council Partners, using it as a potential way to generate local sales.

Adopting a longer-term view, it would be ideal if this VIC collaboration could facilitate multi-destinational bookings along the trail (outside of the destinations they represent) to facilitate a seamless rail trail booking experience.

9.5 SUPPORT DEMAND DRIVING ACTIVITIES THAT STIMULATE AWARENESS AND CONVERSION

GVRT Industry Toolkits

Feedback from the business engagement sessions indicated that industry was happy to support and promote the GVRT but were unsure how to do so, citing poor marketing skill-set as a limiting factor in this regard.

It is recommended that a GVRT toolkit is developed for any businesses looking to promote the trail that includes:

- Copy that provides an overview of the trail, its key selling features and appropriate links, which can be included on business websites.
- Copy relevant to each major township and the associated trail and business offering.
- GVRT images and vision that can be used copyright free via their own marketing effort and digital channels (including social media). The assets supplied to businesses will be updated on a seasonal basis to ensure they are relevant and fit for use.
- A brand licencing agreement which, once executed, will enable businesses to use the GVRT brand is association with relevant channels/communication.
- The GVRT Brand Style Guide.

This will make supporting the rail trail as easy as possible and optimise brand reach by leveraging existing supplier networks.

GVRT Marketing

GVRT marketing has been largely ad hoc, had limited budget and failed to connect with key target segments. As a result, visitation growth has largely been organic rather than intentional. The GVRT needs to be marketed so that it becomes a visitation driver rather than a value-add product, however it is also acknowledged that significant product improvement is required to ensure the on the ground experience reflects the brand promise.

With this in mind, it is recommended that Council Partners increase exposure in the Ride High Country campaign in the short-term to leverage the far broader State funded effort currently in-market. This will keep the product front of mind with consumers and address some of the awareness issues that currently exist with the trail. However, as new GVRT experiences become available, a GVRT specific campaign will be required to raise direct awareness and conversion associated with the trail and its market leading products and experiences. Further details to this effect are noted under item 10.

While the trail is used by cyclists, walkers and horse riders, available budget and promotional opportunities dictate that one market should be prioritised within the marketing effort. To this effect, cyclists should be the primary target due to:

- The long distance of the GVRT in its entirety, as well as the distance between major hubs and townships, which makes access via bike more practical.
- The strong association that rail trails more generally have with cycling.
- The current association of the region with cycling.

That is not to say other users will be alienated from the trail – they just will not be targeted in the short-term marketing program.

GVRT Cooperative Marketing Program

Accompanying a GVRT specific campaign should be the development of a cooperative marketing program available to industry partners. This will have the dual effect of increasing marketing budget, while providing industry with a tangible way to support the trail and gain exposure for their offering.

When this campaign is being developed, Council Partners should develop an advertising prospectus that relates to the channels that feature in the annual marketing program. For a cooperative spend, advertising would be led by the GVRT brand and style-guide but feature the offering of a specific business and its trail-related experience.

Ideally, the prospectus should package:

- A range of cooperative advertising opportunities
- An ATDW listing
- Advertising associated with collateral so that the production of rail trail maps/brochures can become cost neutral.

This would enable Council Partners to also control the GVRT brand message as it would provide an official channel for industry to invest in, rather than the unofficial publications currently being produced by other entities.

Preference should be given to working with businesses most closely associated with the trail, ideally within 1km of the trail itself, to maintain integrity of the campaign being associated with true trail-based business.

GVRT Event

While the GVRT is used for some community based rides and small local events, it would benefit from attracting a signature event that offers scale. Such an event would generate awareness and visitation for the trail, and could also be used to repositioning it in the mind of the consumer.

Some of the councils along the trail already offer event funding – particularly seed funding – that could be used to secure a GVRT event and support its launch. If an event could be secured for the length of the trail, Council Partners could also potentially pool this funding to allow for the securing of a bigger event, or for an event to be secured more economically.

Some options include:

- **Cycle event** – a mass participation, non-competitive challenge like the L'Erocia'; a competitive point-to-point event targeting the ever growing gravel riding market; a novelty bike ride like the 'Tweed Ride' currently hosted in Rutherglen or moonlight ride complete with glow sticks and star gazing; or a mass ride that finishes in one of the trail townships with a festival and bike expo.
- **Running event** – like an ultra-marathon
- **Multi-disciplinary event** – that could incorporate horse riding, cycling and running either as part of a race or in more of a pub-to-pub style offering.

Council Partners could approach existing event promoters active in the region, or develop an EOI association with the opportunity more broadly.

Cycle Partnerships

The Council Partners can secure cost-free exposure for the GVRT by forming strategic relationships with other key rail trail and cycling bodies who have their own database of engaged cyclists that they communicate with. This includes: Bicycle Network, Rail Trails Australia, Audax Australia and Adventure Cycling Victoria.

9.6 IMPLEMENTATION PRIORITISATION

Some of the recommended initiatives are quick fixes while other concepts will take time to develop and implement. With this in mind, the following implementation timeline is recommended:

	Short Term	Medium Term	Long Term
<i>Improve and innovate the trail experience to provide a premium visitor offering</i>	Tell the Story of Existing Sites Signage Upgrade GVRT Digital Functionality	Create Trail Features Through Artistic Installations	Seymour to Tallarook Trail Extension Mansfield Station Precinct Development
<i>Activate the trail with a new range of marketing leadings products</i>	Product EOI and Seed Funding Program Product Adaptation	Product Packaging	Township Audit and Revitalisation
<i>Support demand driving activities that stimulate awareness and conversion</i>	Effective Governance Framework GVRT Industry Groups GVRT Industry Communication Visitor Information Centre Collaboration		
<i>Support demand driving activities that stimulate awareness and conversion</i>	GVRT Industry Toolkits GVRT Marketing GVRT Cooperative Marketing Program	GVRT Event Cycle Partnerships	

9.7 ACTION PLAN AND HIGH LEVEL COSTINGS

Urban Enterprise has reviewed the key recommendations association with the Strategic Development Plan and provided cost estimates for implementation, along with a high-level review of anticipated return by way of additional visitors, dwell-time and spend.

Disclaimer: *Urban Enterprise has relied solely on secondary sources of information provided. This has been a desktop exercise to determine the relative magnitude of economic impact for each investment project, with modelling and assumptions based on secondary research derived from similar product benchmarking. Nevertheless, the professional judgement of the members and employees of Urban Enterprise Pty. Ltd. have been applied in making these assumptions, such that they constitute an understandable basis for estimates and projections. Beyond this, to the extent that the assumptions do not materialise, the estimates and projections of achievable results may vary.*

Project	Action	Details	Responsibility	Cost	Economic Impact Method	Key Economic Outcomes	Economic Impact			
							Additional Visitors	Additional Direct Expenditure	Total Output	Total Jobs
<i>Tell the Story of Existing Sites</i>	<ul style="list-style-type: none"> Appoint researcher and writer to prepare content for signs Council Partners to assist in identifying location of signs. Council Partners to manage sign design and implementation 	Researcher/Writer (\$10k) 20 signs @ \$800 each	Council Partners with independent consultant	\$26,000	For current rail trail users, additional time generated from learning about the area through interpretive signs. 5 minutes per sign per visitor \$3.60 additional yield from time. (assume visitors to average of five signs, assume 50% of visitors)	Drives additional length of stay and visitor yield Improves visitor experience	N/A	\$144,009	\$256,000	1
<i>Create Trail Through Artistic Installations</i>	<ul style="list-style-type: none"> Scope suitable sites for installations Determine themes/stories for trail and/or specific sites. Seek expressions of interest from Artists for 10 installations 	Allowance of \$100,000 per installation	Council Partners	\$1,000,000	For current rail trail users, additional time generated from exploring the artistic installations. (assume two sculptures explored by visitors). It is assumed the trail will attract an additional 15% of visitors per annum staying for 2 nights in the region, based on previous TNE research into cycle tourism (based on projected economic impact modelling for M2M in NEVCO report) Estimates includes both additional yield from existing visitors and expenditure from additional visitors	Drives additional length of stay Attracts additional visitors to the region. Improves visitor experience	11,816	\$2,764,967	\$4,912,000	25

Project	Action	Details	Responsibility	Cost	Economic Impact Method	Key Economic Outcomes	Economic Impact			
							Additional Visitors	Additional Direct Expenditure	Total Output	Total Jobs
Signage Upgrade	<ul style="list-style-type: none"> Review previous signage study and identify priorities for next stage of signage (directions to businesses and townships and distance markers) 	Allow \$300 per sign (allowance 300 signs). Excludes labour for installation, assumed to be provided by Council Partners within operational budgets	Councils Partners	\$90,000	Increase in additional spend from 20% of rail trail visitors (based on additional F&B activity-40% of visitors). These are joined – both contribute to the same outcome.	Drives additional length of stay and yield	N/A	\$921,656	\$1,638,000	8
GRVT Trail Digital Functionality	<ul style="list-style-type: none"> Seek quotations to develop new digital functionality 	Tourism North East to scope on behalf of Council Partners	Tourism North East	\$45,000	Increase in additional spend from 20% of rail trail visitors (based on additional F&B activity-40% of visitors). These are joined – both contribute to the same outcome.	Drives additional length of stay and yield	N/A	\$921,656	\$1,638,000	8
Trail Extensions	<ul style="list-style-type: none"> Agree and design Tallarook to Seymour Extension 	(see UE work)	Mitchell Shire Council	(see UE work)	Modelling taken from previous Economic Impact Assessment Note yield from visitors is low due to low level of product and primarily daytrip visitation for this section of trail.	Drives additional length of stay Attracts additional visitors to the region.	17,612	\$280,149	\$383,489	3
Mansfield Railway Station Precinct Development	<ul style="list-style-type: none"> Deliver bike hub and food and beverage component 	(see SJB work)	Mansfield Shire Council	(See SJB work)		Drives visitor yield from existing visitors by providing new product and experiences at the trail head in Mansfield	N/A	N/A	N/A	N/A

Project	Action	Details	Responsibility	Cost	Economic Impact Method	Key Economic Outcomes	Economic Impact			
							Additional Visitors	Additional Direct Expenditure	Total Output	Total Jobs
Product EOI and Seed Funding Program	<ul style="list-style-type: none"> Arrange seed funding to support product development Prepare an expression of interest for product development 	Grant of \$20,000 X 4	Council Partners in conjunction with Regional Tourism Board	\$250,000	Four new businesses established to service the rail trail – 2 employees each + turnover of \$250,000 allocated to rail trail	Business development and enhancement Drives additional length of stay and yield	N/A	\$1,000,000	\$1,777,000	8
Product Adaption	<ul style="list-style-type: none"> Prepare a product adaption information kit for businesses to consider 		Regional Tourism Board and/or Visit Victoria	In Kind						
Product Packaging	<ul style="list-style-type: none"> Undertake engagement with businesses to educate and facilitate product packaging Prepare and promote packages which respond to market need 		Regional Tourism Board and/or Visit Victoria	In Kind	Increase in revenue for 10 businesses servicing the trail. Additional \$50,000 revenue per business	Business development and enhancement drives additional length of stay and yield	N/A	\$500,000	\$889,000	5
GVRT Toolkit	<ul style="list-style-type: none"> Develop a toolkit for businesses 	Content/ imagery already available. Allow \$2k per annum for any additional packaging required to make it fit for purpose.	Regional Tourism Board	\$2,000	Increase in revenue for 20 businesses servicing the trail. Additional \$200,000 revenue per business					

Project	Action	Details	Responsibility	Cost	Economic Impact Method	Key Economic Outcomes	Economic Impact			
							Additional Visitors	Additional Direct Expenditure	Total Output	Total Jobs
Township Audit and Revitalisation	<ul style="list-style-type: none"> Councils to commission tourism audit/gap analysis of town offering per LGA 	\$100,000 per Shire	Murrindindi and Mansfield Shires	\$200,000	N/A (outside of project scope)	Will deliver increased yield and visitation with product and experience enhancement in townships	N/A	N/A	N/A	N/A
Effective Governance Framework	<ul style="list-style-type: none"> Establish a GVRT Management Committee of Council Partners 	Three representatives on from each Council (CEO, tourism/ economic development manager and engineer)	Mitchell, Murrindindi and Mansfield Shires	In Kind	N/A	Improved collaboration leading to streamlined messaging and consistent and strategic approach to delivery	N/A	N/A	N/A	N/A
Industry Groups	<ul style="list-style-type: none"> Twice yearly meeting of industry groups 		GRVT Management Committee	In Kind	N/A	Improved collaboration between industry leading to improved visitor servicing, experience and product consistency	N/A	N/A	N/A	N/A
GVRT Industry Comms	<ul style="list-style-type: none"> Develop a communications plan to engage with industry 		GRVT Management Committee	In Kind	N/A	Improved collaboration between industry leading to improved visitor servicing, experience and product consistency	N/A	N/A	N/A	N/A

Project	Action	Details	Responsibility	Cost	Economic Impact Method	Key Economic Outcomes	Economic Impact			
							Additional Visitors	Additional Direct Expenditure	Total Output	Total Jobs
Visitor Information Centre Collaboration	<ul style="list-style-type: none"> Dissolve the visitor servicing agreement with Mansfield Shire VIC GVRT briefings at the VICs twice yearly Information requests to be forwarded to both Mansfield and Yea VICs GVRT phone number to be disbanded 		GRVT Management Committee	In Kind	N/A	Delivery of contemporary targeted visitor services to support consistent experience across the length of the trail	N/A	N/A	N/A	N/A
GVRT Marketing	<ul style="list-style-type: none"> Leverage from Ride High Country program in years 1 – 3. Deliver complementary GVRT specific campaign in years 2 and 3. 		Tourism North East	\$30k year 1 \$60k year 2 \$90k year 3	Based on growth outcomes from Ride High Country Campaign which was based on significant investment and achieved 6.2% growth per annum in cycle visitors. 6.2% growth p.a. applied to rail trail visitors of 78,774 in 2018. P.a. outcomes based on proportion of total economic impact (based on proportion of total budget p.a.)	Increased visitation per annum Increased awareness and motivation to visit	15,579	Total: \$1,822,762 Yr 1: \$260,395 Yr 2: \$781,184 Yr 3: \$781,184	Total: \$3,223,000 Yr 1: \$463,000 Yr 2: \$1,380,000 Yr 3: \$1,380,000	Total: 16 Yr 1: 2 Yr 2: 7 Yr 3: 7
GVRT Cooperative Marketing Program	<ul style="list-style-type: none"> Prepare a prospectus for cooperative marketing 		Council Partners							
GVRT Event	<ul style="list-style-type: none"> Council partners to allocate funding for attraction of an event 	\$10,000 per Council	Council Partners	\$30,000	Direct expenditure in region for an event with 1000 visitors, staying two nights.	Increased visitation Increased awareness and motivation to visit	1,000	\$234,000	\$416,000	2
Total**				\$1,673,000			46,007	\$8,589,199	\$15,132,489	65

9.8 IMPLEMENTATION RESOURCE

It is acknowledged that considerable effort must be made in the short-term to lift the performance of the GVRT and begin to transition it from a simple asset to a premium tourism product. To scope, facilitate and/or implement these recommendations, a coordinated effort will be required between the Council Partners that is likely to be over and above current internal resource. As such, this effort would benefit from the appointment or contracting of a resource who is charged with delivering some or all of these tasks on behalf of the three Council Partners to realise plan goals in a timely manner and ensure program accountability.



10. THREE-YEAR MARKETING STRATEGY

In line with the recommendation noted under section 9.5, this three-year marketing strategy has been developed with a focus on growing visitation amongst cyclists. However, this should not detract from the multi-use nature of the trail and efforts to communicate its availability and suitability to other users, particularly walkers and horse riders.

10.1 AUSTRALIAN CYCLING MARKET

The North East region has commissioned significant research into the Australian cycle market in association with three key cycle disciplines – road cycling, mountain biking and rail trail riding.

While only 4% of the Australian population participate specifically in rail trail riding, 17% of Australians ride on bike paths pointing to a far larger recreational cycle market that can be captured for the GVRT.

This research was also used to ascertain consumer awareness for regions around Australia associated with rail trail riding. This research identified that the High Country is comfortably the most considered region for rail trail bike riding, followed by Victoria’s Goldfields and then Adelaide and surrounds. While it is acknowledged that the Murrindindi and Mitchell Shires do not sit within the High Country, their physical proximity to the region and the fact that a trail head is located in the High Country area creates a leverageable and competitive position for the GVRT.

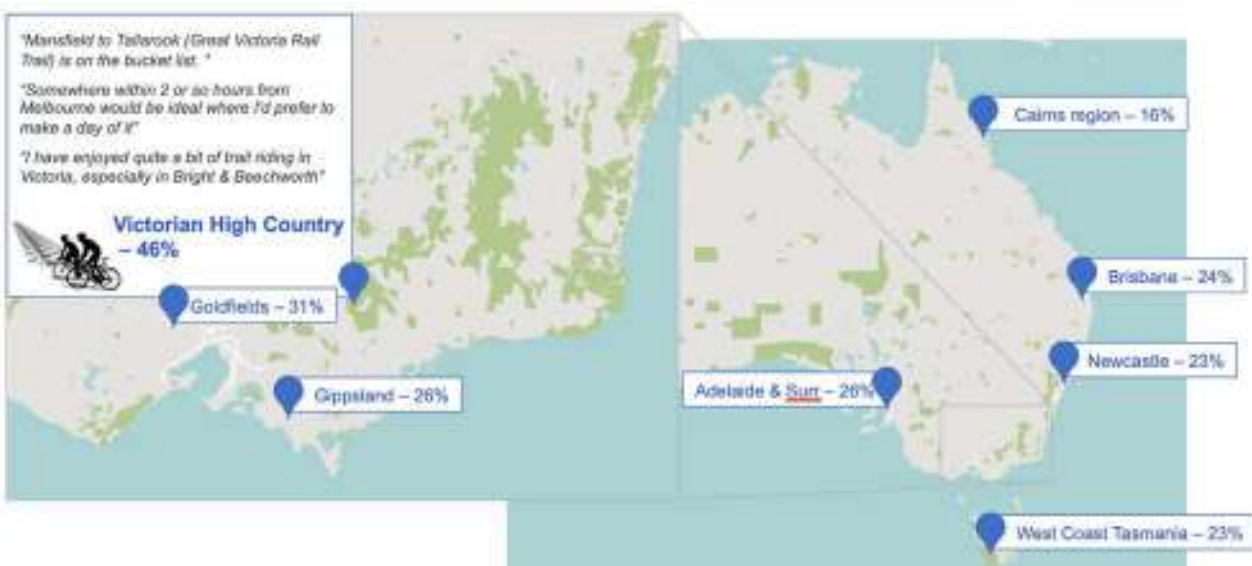
Figure 33: Australian Cycling Participation

Source: BDA Marketing, 2018



Figure 34: Competitive Australian Rail Trail Destinations

Source: BDA Marketing, 2018









10.2 CONSUMER SEGMENTS

There are 750,000 cyclists who specifically identify themselves as rail trail riders, complemented by a further recreational cycle market of 3.3million cyclists who ride on bike paths. Those who specifically ride rail trails are segmented as per the following table.

a. Rail Trail Consumer Segments

Research of the rail trail market indicates that it consists of three key consumer segments, summarised as follows:

Segment (% of market)		% Value	Summary
Cycling All-rounders (54%)			<ul style="list-style-type: none"> • Mostly males under 45 • Rail trail riding one of the types of cycling enjoyed, though other types more frequent (& generally more preferred) • Rail trailing is for fitness, enjoying nature & doing something different to the routine • Take ~3 overnight trips per year on which they go Rail trailing
Rail Trail Families (16%)			<ul style="list-style-type: none"> • More even gender spread with an average age of ~40 • Key motivations for rail trail riding are spending time with the family & enjoying the natural environment • Take an average no. of trips per year, but larger travel party leads to higher spend
Rail Trail Only (31%)			<ul style="list-style-type: none"> • 60% male, 40% female, majority below 35 years • Rail trailing allows them to enjoy nature & try something different whilst exercising • Rail Trail the preferred type of cycling, though other hobbies more important • Fewer than average trips per year, below average spend

These three segments are explored in more detail as follows:

Cycling All-Rounders

Cycling All-Rounders are primarily male (67%) and aged between 18-44 (26% aged 18-24, 33% aged 25-34 and 22% aged 35-44).

Their main motivation for riding is fitness, however they also use it as a way to enjoy the natural environment and to spend time with their partners. These riders enjoy rides that range from easy, short-distance routes to intermediate, longer distance options. They have a preference for scenic or sight-seeing rides that offer several stop-offs, and 20% of them also partake in multi-day rides.

Cycling All-Rounders have taken an average of 2.8 overnight cycling trips in the past year and spend an average of \$659 per trip. When choosing a travel destination, the quality of the trails and surrounding scenery is of most importance, complemented by safe access to bike trails, bike friendly public transport and networks of trail that link with key towns. However, the distance to the destination is also a primary consideration factor.

These riders participate in a broad range of cycling, with 81% also being road cyclists and 68% mountain bike riders, with rail trail riding just seen as another way to enjoy their chosen activity. Rail trail riding is seen as relaxing, a great way to experience the natural landscape and also provides an opportunity to ride with less experience partners and family members.

Rail Trail Families

Rail Trail Families are one of the few cycle segments that has a fairly even male/female representation, with riders primarily aged 35-44 (40%).

The family-based nature of this group means that it has different motivators than most of the other segments targeted in this plan. That is, their number one motivation for cycling is to spend time with the family, followed by enjoying nature and the environment. Catering for different ride abilities, they prefer easy, short distance rides for leisure or scenic sight-seeing rides with multiple stops.

Rail Trail Families have taken 2.5 overnight cycling trips in the last year and exhibit a higher spend due to the larger travel party, spending an average of \$1,339 on their overnight trips. When selecting a destination to go riding in, key factors in determining destination choice are other things to see and do in the area, quality of trails and scenery and safe access to trails. However, distance to the destination is also an important consideration.

One or both of the parents in this segment are likely to have been avid riders before having kids, and now see rail trail riding as a great way of continuing the activity with their children while spending quality time outdoors. As such, Rail Trail Families also participate in other ride disciplines, with cross-over with mountain biking (48%) and road cycling (44%).

Rail Trail Only

Rail Trail Only riders are named after the fact that they only ride on rail trails or similar recreational bike paths. They exhibit no crossover with any other type of riding like mountain biking and road cycling.

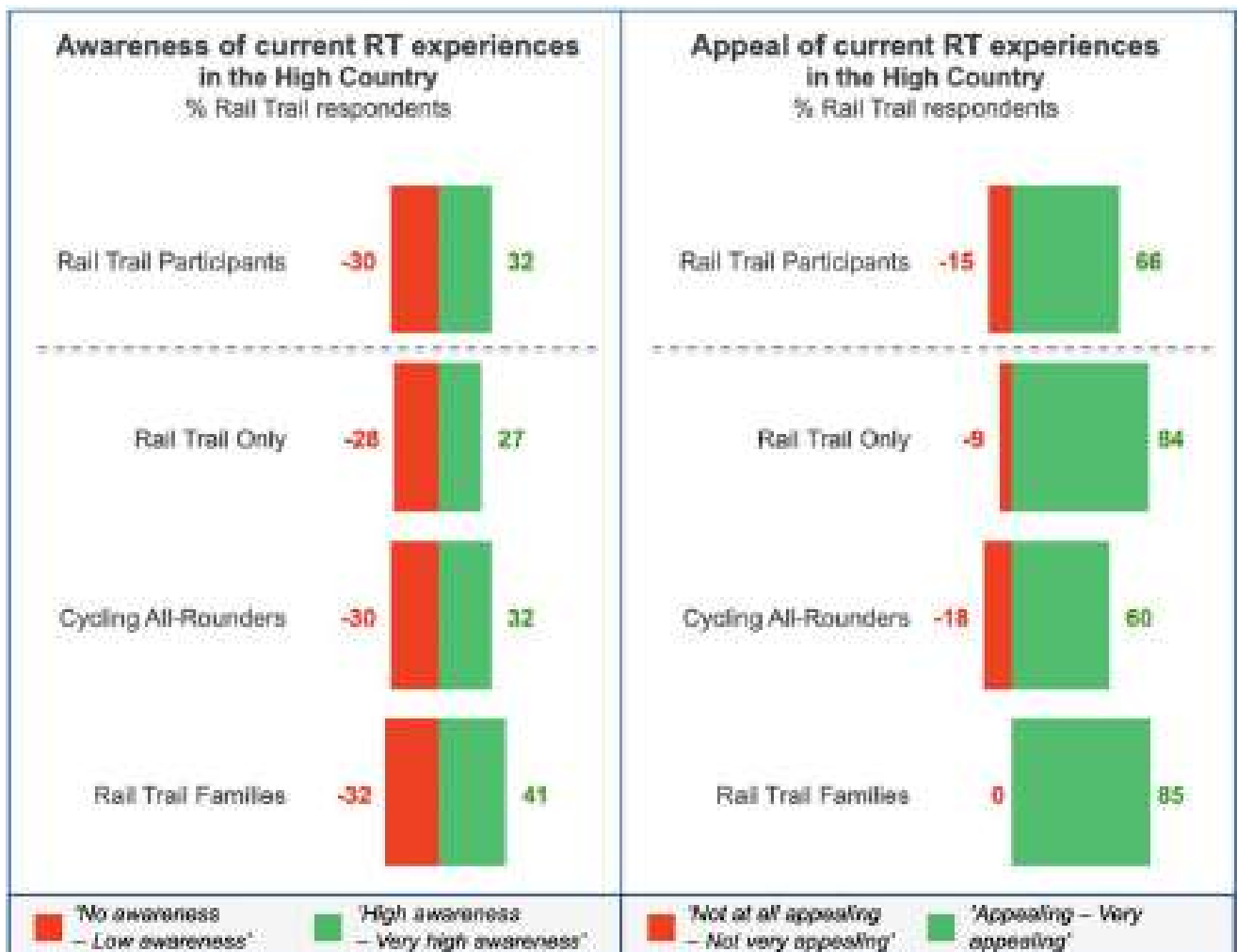
They are primarily male and aged 18-24 or 25-34 (both 29%). They ride as a way of enjoying nature and the environment, as well as for fitness. They overwhelmingly prefer easy, short-distance rides for leisure (63%) but will also participate in longer intermediate rides, and scenic rides with several stop-offs.

In the last year they have taken 1.3 overnight cycling trips, spending an average of \$683. There are several predominant factors in their cycling destination choice – from a trail perspective it is safe access to bike paths and the quality of the trails and surrounding scenery; however other things to see and do and distance to the destination are just as important.

b. Segment Awareness and Intention to Visit

Research provides insights into the awareness and High Country appeal amongst the rail trail market. Overall, this research shows that there is relatively low awareness of the regional rail trail offering, which includes the GVRT. However, when the offering is presented to respondents, it is viewed as highly appealing.

Figure 35: Awareness and Appeal of High Country Rail Trail Experiences



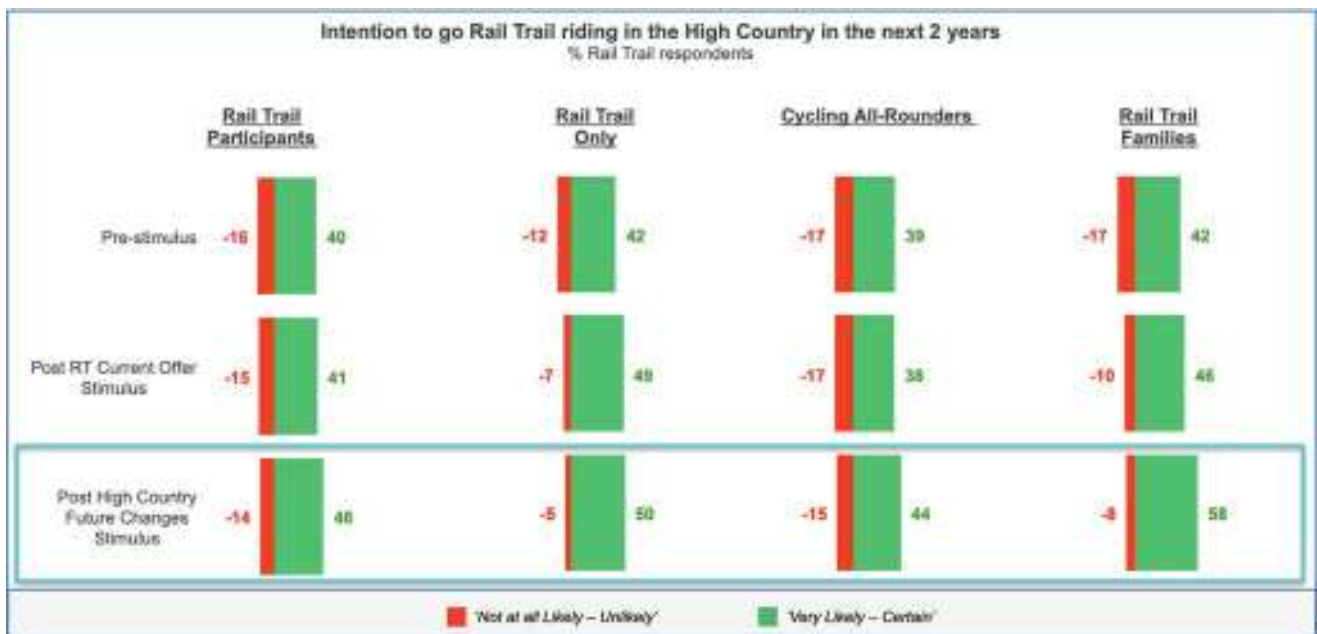
Source: BDA Marketing, 2018

The research also considered how the introduction of the following would impact intention to visit:

- Introduction of stimulus: How intention to visit lifted by simply telling riders what was already available in-region through the introduction of imagery and content about the existing rail trail offering.
- Change in the offering: It then gauged how intention to visit would improve if new services were offered in association with the trails, like easy trail access from townships, bike transport, great signage and bike friendly towns.
- Future concepts: The research then looked at how the introduction of new tourism concepts, like rail trail look-outs, installations and supporting tourism products like wine and produce trails would impact intention to visit.

Simply presenting the current offering created a lift across all rail trail segments, however the launch of new products – both standard services and more blue-sky concepts - created a significant uplift in intention to visit. This is to be expected considering that riding rail trails is seen as part of holistic tourism experience.

Figure 36: Impact of Stimulus on Rail Trail Riding Intentions



Source: BDA Marketing, 2018

c. Target Segments

Rail Trail Families have the highest existing awareness of the High Country rail trail offering and the current trail experiences appeals to the majority of the segment (85%). They also have the highest existing intent to visit the High Country (equal with Rail Trail Only) and also exhibit a positive response to marketing efforts. The high value of this segment due to the party size, strong alignment with both the region's cycle and other activity offering, and the potential to convert younger riders to regional loyalists, ensures that this is a primary segment for marketing efforts.

The Rail Trail Only segment specifically identifies with this type of recreational cycling, so is a natural fit for the GVRT. However, rail trail riding is one of many activities that these consumers pursue, so marketing effort must consider how to position this offering as a key tourism driver ahead of competing interests – something that GVRT's position as the longest rail trail in Victoria is well positioned to cater for. As such, Rail Trail Only consumers are also a primary segment for the GVRT.

Cycling All-Rounders have sound existing awareness of the rail trail experiences available in the High Country and the appeal of the current offering is good. However, when presented with marketing stimulus regarding the current rail trail offer, intention to visit does not increase, which means that improvements to the GVRT may be required before this segment can be effectively engaged. As this segment participates in a range of riding types, growth in this segment will also come by positioning the GVRT as a hero product within a suite of broader regional cycle experiences. As such, this is currently considered a secondary market for the GVRT but one that must still be targeted due its relative market size and value.

While the travel parties associated with Cycling All-Rounders and Rail Trail Only versus Rail Trail Families are quite different, there are some messaging commonalities between these segments that should form the focus of GVRT marketing efforts:

- The GVRT is longest rail trail in Victoria that is safe and easy to ride.
- It is a signature cycle experience that offers access to beautiful natural landscapes and unique pause-points that are worth travelling for.
- The GVRT is supported by breadth of supporting tourism experiences including great walks and food/wine.
- It is accessible and within close proximity to Melbourne.



10.3 MARKETING OBJECTIVES

The three-year objectives of the GVRT marketing campaign are as follows:

- To increase awareness of the GVRT as an appealing recreational cycle tourism experience.
- To increase cycle tourism visitation and yield in association with the trail.
- To position the GVRT as the longest rail trail in Victoria and a 'must do' cycle experience.

These overarching objectives should be supported by specific annual targets that are reflective of available marketing budget.

10.4 PRODUCT-MARKET STRATEGY

The strategic plan has ascertained that significant product enhancement and development is required to lift the visitor experience associated with the trail. However, the implementation of such experiences may take several years to come to fruition.

While trail improvements are occurring, it is recommended that a market penetration strategy is adopted that celebrates existing trail features amongst existing segments. This approach will be effective in growing market share through simply raising awareness of the current offering - the product-market strategy with the lowest risk.

However, as new and experiences launch, the marketing strategy should transition to one of New Product Development – targeting established markets with a new range of relevant experiences. It will be important to move into this phase as quickly as possible considering the aforementioned impact that new services and blue-sky concepts have on intention to travel among key segments.

Neither a Market Development nor Diversification approach is recommended, as there is still so much unrealised potential within existing markets that should be optimised before considering new opportunities.

Figure 37: GVRT Product-Market Approach

		Products	
		Existing	New
Market	Existing	<p>Market Penetration Year 1</p> <p>Take a greater share of the existing cycle market through promoting the current product to existing segments</p>	<p>New Product Development Year 2 and 3+</p> <p>Promote new cycle services and trail experiences to drive new and repeat visitation, and extend length of stay/yield</p>
	New	<p>Market Development Not recommended</p>	<p>Diversification Not recommended</p>

10.5 TARGET MARKETS

For both the High Country and Goulburn River Valley tourism regions in which the GVRT sits, the visitor market is overwhelmingly domestic, with less than 1% of the market representing internationals.

The domestic market is also primarily intrastate for both regions, with 79% of the High Country's visitors being from Victoria and 80% of Goulburn River Valley.

There is a heavy skew for Melbourne market particularly in terms of overnight stays, however regional Victoria is also clearly an important source market for the trail.

With this in mind, the campaign should focus on growing the valuable intrastate market as it is the largest current customer base for the region. Intrastate visitors are more likely to have some awareness of the GVRT and experience less barriers to travel, which means it also represents the strongest growth opportunity. While the greatest effort will be placed on the profitable Melbourne market, investment throughout key regional centres will also be required to fully leverage Victorian market opportunities.

Visitor	High Country		Goulburn River Valley	
	Melbourne	Other VIC	Melbourne	Other VIC
Domestic Daytrip	29%	56%	62%	32%
Domestic Overnight	59%	19%	61%	22%



10.6 STRATEGIC FRAMEWORK

This three-year Marketing Strategy provides the overarching direction for GVRT marketing efforts, which will then need to be supported by an annual marketing plan that identifies specific program initiatives. While these deliverables may change each year in response to changing market trends and annual campaign learnings, they will be guided by the following strategic framework, which defines two key campaign phases:

a. Year One:

Regionally Led Brand Awareness

In line with the Market Penetration strategy, the first phase of the campaign should focus on driving brand awareness for the GVRT. Driving awareness requires a heavy use of above the line (ATL) media – high-cost, high-impact mass media channels that can stimulate brand recall and recognition.

While an appropriate budget could be recommended for this to be delivered independently by GVRT, a better use of spend would be to increase visibility of the GVRT within the existing regional Ride High Country campaign, leveraging a \$1.1million per year budget that can significantly amplify local investment and existing brand equity.

This will also ensure that awareness of the GVRT brand grows while the product itself is being developed, laying the foundations for the next phase which features targeted GVRT marketing.

Complementary to this, Council Partners should invest in a small social media campaign that leverages the broader Ride High Country effort and continues to build an online following specifically for GVRT.

b. Year Two and Three:

Locally Led Product Awareness and Conversion

In years two and three, investment should be sustained in Ride High Country marketing to ensure that the GVRT remains front of mind with consumers as part of a broader cycle tourism program. However, budget needs to be allocated to an independent GVRT campaign.

In line with the Product Diversification strategy, it is envisaged that on-the-ground improvements to the GVRT experience will start to come to fruition in years two and three of this strategy. These improvements – the ‘new news’ specific to GVRT and of appeal to target markets - should be showcased via a GVRT specific campaign that incorporates some ATL media but primarily employs below the line (BTL) channels.

In order to effectively reach the target market, it will be important to translate the comprehensive segments noted above into insightful media profiles to determine which of these channels best speak to them, and how their media preferences may evolve on an annual basis in line with changing media trends.

Rather than just speaking to the mass market, these targeted activities will be more personalised and tailored to meet the needs of the trail’s primary customer segments. This phase of the campaign is likely to incorporate a strong digital component, which is a channel perfectly positioned to carry an individualised messaging and speak to customers via media that appeals directly to them.

Key to Phase Two efforts will be focus on consumer engagement and conversion, with the promotion and uptake of new product and services being central to the program. This means that some investment in the capturing of new photos and videos of these assets will be required to lead campaign efforts.

10.7 BUDGET

The below budget reflects the minimum of what is required to ensure that marketing efforts impact visitation trends. As always, the greater the budget the more significant and integrated the campaign can be, so optimising spend is recommended where possible.

Opportunities to bolster the budget should also be sought through working with industry, particularly in years two and three in support of the GVRT specific campaign, as noted in in item 9.5.

Year	Activity	Budget	Annual Total
One	Ride High Country Buy-in	\$20k	\$30k
	Digital Asset Management	\$5k	
	GVRT Social Media Campaign	\$5k	
Two	RHC Buy-in	\$20k	\$60k
	Digital Asset Management	\$5k	
	Asset Capture	\$5k	
	BTL campaign	\$30k	
Three	RHC Buy-in	\$20k	\$90k
	Digital Asset Management	\$5k	
	Asset Capture	\$5k	
	BTL campaign	\$60k	

11. ADVOCACY STRATEGY

Most of the recommendations within this strategy point to the need for significant investment, which may require the support of State and Federal funding to implement. Success in this space will come from having a clear advocacy strategy that all Council Partners can subscribe to:

Advocacy priorities

On an annual basis (at the Committee meeting), Council Partners must determine advocacy priorities over the coming financial year, presumably moving through the short to long terms priorities noted in this strategy. These should be priorities that involve or benefit all LGAs associated with the trail for collective impact and action.

Council Partners should consider where smaller or less engaging projects can be partnered with high-profile recommendations to improve their investment potential.

Once the priorities have been identified, a local financial contribution to the implementation of these projects must be determined that can be used to leverage broader public investment.

Priority project messaging

If advocacy efforts are to be united and have impact, then all parties must be carrying a consistent message. This includes:

- Agreed GVRT message: GVRT is the longest rail in Victoria and has the potential to be a hero nature-based tourism asset for the State if properly developed.
- Priority project message: Three simple messages associated with the specific project:
 - > What: XX project has been identified as key to driving visitor economy uplift in association with the GVRT.
 - > It will cost \$XX to implement with \$XX already committed at a local level.
 - > It will attract XX more visitors and increase visitor spend by XX.
- Collaborative LGA message: This project will benefit a broad range of stakeholders, supported by the Councils, industry and communities across three LGAs who are working collaboratively in association with this project.

Advocacy Targets

The Council Partners must collaboratively determine who they need to target with their advocacy efforts, and who will take the lead with each of these entities. This should include relevant Ministers (particularly Regional Development and Tourism), Regional Development Australia, Regional Development Victoria, Regional Partnerships, Visit Victoria and relevant regional tourism boards. However, it may also include private sector or philanthropic entities.

Depending on the scope of the project, some of this advocacy work may be undertaken jointly (ie/ the three LGAs meeting with the aforementioned Government entities) or may form part of broader economic development discussions undertaken by the Council Partners independently from each other. This is where agreed messaging is key to ensure alignment between these efforts.

Advocacy Ambassadors

For projects of scale, it is ideal to identify some advocacy ambassadors who can add their profile to the effort. This may not always be possible but lends weight to the collective voice.

12. POTENTIAL FUNDING

The Council Partners must identify potential grant funding streams that will assist in the implementation of key strategy recommendations. While they may elect to submit funding applications specific to their sections of the trail, greater success will come from collective submissions that are seen to benefit and be supported by multiple stakeholders.

At the time of writing this strategy, limited funding streams are available that are suited to the proposed GVRT developments. This is reflective of potential organisational changes on the horizon within the regional development portfolio, and a Regional Tourism Review that is currently underway that has largely suspended tourism grant funding. However, it is anticipated that this will likely change in the 2020/21 financial year, so Council Partners must be clear in the development of priorities and be ready to act when Government grant funding again comes online. Some likely candidates for GVRT include:

Regional Tourism Infrastructure Fund

Regional Development Victoria

Funds high value projects that activate, create or redevelop tourism assets that demonstrate a significant impact on the visitor economy. In particular, the fund focuses on projects that attract increased visitors to the region, increase visitor yield, deliver an improved experience for those who visit and reside in regional Victoria and stimulate increased private sector investment.

Building Better Regions Fund

Commonwealth Department of Industry Innovation and Science

Supports the Australian Government's commitment to create jobs, drive economic growth and build stronger regional communities into the future. Two streams fund infrastructure projects and community investments.

Regional Events Fund

Visit Victoria

Provides funding for activities that support regional visitation. Consideration is given to a broad range of potential impacts including visitation, expenditure, seasonal hotel occupancy, potential to encourage local development and economic flow on to the local business community.

Some alternate Government and non-government grant funding opportunities that are currently available are noted below. While some of these are not available to LGAs specifically, alternate organisations can auspice applications as required:

GRANT NAME	FUNDING PARTNER	AMOUNT	PURPOSE	POTENTIAL APPLICATION
Arts Projects - Organisations	Australia Council	\$10,000 to \$100,000	Funds a range of activities that deliver benefits to the arts sector and wider public, including national and international audiences.	Implementation of artistic trail installations
General Grants	The Gordon Darling Foundation	Undisclosed	Supports the visual arts and promotes, through public institutions, access to and enjoyment of all areas of the visual arts, to the broadest possible audience	Implementation of artistic trail installations
Regional Arts Fund Community Grants	Regional Arts Victoria	\$0 to \$15,000	Benefits regional and remote arts practitioners, art workers, audiences and communities	Implementation of artistic trail installations
Public sector innovation fund	Department of Premier and Cabinet	\$50,000 to \$400,000	Drives new, more effective solutions to complex policy and service delivery arrangements in Victoria	A range of applications for co-developed initiatives
Regional Jobs Fund	Regional Development Victoria	Undisclosed	Facilitates job creation and retention of existing jobs. It attracts and facilitates investment with a focus on competitive advantage or high-growth potential businesses and will assist to diversify the regional employment base.	Could support the development of new products/ services that stimulate job creation
Stronger Regional Communities Plan Small Grants Program	Regional Development Victoria	To \$50,000	Supports rural and regional towns in attracting families and young people to live and work. It invests in community-led initiatives and partnerships that create or enhance the conditions for economic growth and build resilient, diversified and sustainable economies.	Could support a range of recommendations.

GRANT NAME	FUNDING PARTNER	AMOUNT	PURPOSE	POTENTIAL APPLICATION
<i>Conservation and Interpretation Grants</i>	Copland Foundation	To \$50,000	Awarded for the conservation, research and/or interpretation of historic houses or gardens, or collections and individual pieces already held by an institution	Could support the showcasing and celebration of historic sites along the trail
<i>Regional Infrastructure Fund</i>	Regional Development Victoria	To \$500,000	Harnesses key regional strengths to improve Victoria's productivity and liveability. It invests in major infrastructure projects that create or enhance the conditions for economic growth and which build diversified and sustainable regional economies that are resilient to change.	Could support a range of larger scale recommendations
<i>Qantas Regional Grants</i>	Qantas	Undisclosed	Provides financial, flight and marketing support to community groups and organisations to help further their causes and set them up for success	Could support a range of smaller recommendations
<i>Significant Sporting Events Program</i>	Sport and Recreation Victoria	To \$150,000	Helps sporting, community and event organisations to deliver significant sporting events in Victoria	Could be used to secure more competitive event associated with the trail