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## Report prepared by:



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Photos are courtesy of Tourism Victoria's image library

## **Traditional owner acknowledgment:**

Trails across the State of Victoria traverse the traditional lands of many Aboriginal groups. The land has special cultural significance for the Traditional Owners who have always had a spiritual relationship with their country. This relationship remains strong and important to the people today. The agencies responsible for producing this plan recognise and respect the connection between Traditional Owners and their country.

## Introduction

The Barwon South West Cycle Tourism Strategy (the strategy) sets out a short to medium term approach to capitalise on the opportunities to grow the cycle tourism sector. This strategy forms part of a project to strengthen adventure tourism in Victoria's Barwon South West Region (the BSW region) through the development of a sustainable network of trails that will bring social and economic benefits to the community.

Cycle tourism is a fast-growing and high yield tourism niche market within Australia with bicycle sales and the popularity of cycling by tourists and the general public all showing strong growth domestically. Demand for cycling experiences by international tourists is also increasing.

The BSW region covers nine local government areas in south-west Victoria and incorporates two sub-regions – G21 (the City of Greater Geelong, Borough of Queenscliffe, the Surf Coast, Colac-Otway and Golden Plains Shires<sup>1</sup>) and the Great South Coast (the City of Warrnambool and Corangamite, Moyne, Glenelg and Southern Grampians Shires).

The region possesses a unique advantage to grow its cycle tourism sector. This is supported by a number of factors. These factors include the State Government's recent positioning of Victoria to become Australia's premier destination for cycling (*Victoria's Cycle Tourism Strategy 2014* - 24); the region's important geographical location close to Melbourne; a large network of trails and quality mountain bike hubs; an established program of national and international cycling events; and a spectacular and iconic natural landscape.

But the BSW region is not alone in seeking to advance its standing as a cycle tourism destination. Other regions in Victoria such as North East, East Gippsland and Mornington Peninsula are all developing their cycle tourism product and other areas in Australia are also looking at doing so. If the BSW region does not capitalise on its capacity to attract more cycle tourists then it will almost certainly be left behind.

### **VISION**

To be recognised as Victoria's premier trail destination with a range of trails and cycling touring routes that offer exceptional natural adventure experiences

This strategy identifies how the region can best develop exceptional cycle tourism experiences in a consistent and collaborative way that strengthens its adventure tourism offering, increases visitor numbers and generates economic and social benefits. It identifies a relatively modest but achievable number of strategies and specific actions to guide the sector's growth.

## Methodology

The methodology adopted for the preparation of the strategy has involved a strong collaboration between industry, the local councils within the G21 and Great South Coast sub regions, Parks Victoria, Department of Department of Environment, Land, Water & Planning (DELWP), Tourism Victoria, Regional Development Victoria (RDV) and other key stakeholders.

Key steps have been:

- » a number of workshops which brought together the key stakeholders
- » meetings with commercial operators and user groups
- » release of the Draft Cycle Tourism Strategy to key stakeholders for comment, and consideration of comments for development of the final strategy.

This strategy connects the broad range of organisations and initiatives that have historically worked independently on the development of cycle tourism products, drawing them together in a shared vision to effectively and consistently develop cycle tourism across the BSW region.

<sup>&</sup>lt;sup>1</sup> Golden Plains Shire is not involved in this project

This strategy is underpinned by a number of other documents prepared to support the on-going development of the region's adventure tourism offering (see below).

# **Business Case and Action Plan for Barwon South West Region**

A business case and action plan to develop the region as Victoria's premier trail destination. These documents provide an update on the recommendations in the Barwon South West Regional Trails Master Plan prepared in 2009.



## **Regional Trails Marketing Plan**

A coordinated and measurable marketing strategy aimed at positioning the region as a premier trail destination in Victoria.



# **Guidelines for Trail Planning, Design and Management**

A tool kit to assist managers to adopt best practice design principles and standards for planning, constructing, maintaining and managing quality trails and associated infrastructure across the Barwon South West region.



## Scope and coverage

The area covered by this strategy extends from Geelong to Portland along the Great Ocean Road, north to the Grampians and back to Geelong via the Hamilton Highway. It encompasses stunning coastal scenery, rolling countryside, flatlands, lakes, country towns, rivers and the rugged forests of Great Otway National Park.<sup>2</sup>

For the purposes of this strategy, cycle tourism involves road and off-road riding. It includes day and overnight trips undertaken by intrastate, interstate and international visitors. The focus is on cycling that draws visitors away from home from start to finish of a trip. It involves using a car or other transport to take bikes to a destination for riding. It includes riding for fun, exercise, social occasions, challenge, events, training, and to explore a region.<sup>3</sup>

## **Objectives**

This strategy is designed to achieve the following objectives:

- 1. More visitors riding in the BSW region by 2025
- 2. Greater economic benefit from cycle tourism by 2025

<sup>&</sup>lt;sup>2</sup> Referred to interchangeably as 'Barwon South West,' 'BSW' or 'the region' in this document.

<sup>&</sup>lt;sup>3</sup> Cycle Tourism Australia 2014 *Different Types of Cycle Tourists*. Market segments identified by Cycle Tourism Australia include (i) The Day Tripper (ii) The Loop Rider (iii) Event Participant – rider and observer (iv) Tourer – on and off-road (v) Mountain Bike Riders. These are broad segments that have further divisions within them. This document uses some of the same segments as Cycle Tourism Australia as well as others that are more specific to BSW region.

## Strategic alignment with state and regional initiatives

The development of the cycle tourism sector in the BSW region is linked to several state and regional initiatives, including:

- » G21 and Great South Coast Regional Strategies that aim to improve livability and health and well-being of communities by expanding cultural and recreational activities
- » Victoria's Cycling Strategy 2013 2023 sets out the Victorian Government's 10-year plan to grow and support cycling and build a more bike-friendly state
- » Victoria's Cycle Tourism Action Plan 2011-2015 that identifies the Great Ocean Road and Grampian Region as having primary strength in mountain biking and major cycling events and secondary strengths in road cycling and trails
- » Victoria's Trails Strategy 2014 –24 a whole-of-Victorian Government approach to create an 'enabling environment' for investment and promotion of trails in Victoria
- » The Regional Tourism Strategy for Victoria that focuses on improved marketing of regions to the major intrastate market and encourages private sector investment in regional tourism
- » A new GOR Destination Management Plan (under development)
- » The Shipwreck Coast Master Plan 2015 to revitalise tourism-related infrastructure and activities, create outstanding visitor experiences and improve environmental sustainability in the iconic Twelve Apostles area
- » Strong support for cycle tourism from local and state government stakeholders
- » Strong support and interest from cycle tourism product development from commercial operators and local community.

The details and relevance of these strategic planning documents are summarised in Table  ${\bf 1}$ 



Table 1 – Strategic background to developing cycle tourism in BSW region

PLAN / STRATEGY	RELEVANCE
Victoria's Cycling Strategy	An over-arching document for cycling in Victoria. Six strategic directions include:
2013 - 2023	Build evidence (to inform decision-making)
	3. Enhance governance and streamline processes (for inter-agency collaboration)
	4. Reduce safety risks
	5. Encourage cycling (get more Victorians onto bikes)
	6. Grow the cycling economy
	7. Plan networks and prioritise investment (this relates directly to the BSW Cycle Tourism Strategy in terms of rationalising investment in trails)
Victoria's Trails Strategy	State strategy to guide investment in trails for walking, biking and horse riding. This influences the BSW Cycle Tourism Strategy in terms of the ranking of
2014 – 2024	significance and investment priority for selected trails. These are discussed further on in this document. Five strategic directions include:
2014 2024	1. Provide a strategic framework for trail investment
	8. Support effective planning, development and maintenance of trails
	9. Provide high quality information on trails
	10. Create better trail experiences
	11. Market trails
Shipwreck Coast Master	This plan is nearing completion. It covers the area from Bay of Islands in the west to Princetown in the east and focuses on the key visitor attractions of the
Plan 2014	Twelve Apostles and Loch Ard Gorge. Recommendations include a series of nodes where cycle touring routes will be developed into the hinterland. Bike hire
Vistaviala Caslina Tassiana	and support services are envisaged to get people out of cars and other vehicles and into the landscape for longer.
Victoria's Cycling Tourism	Developed to position Victoria as the leading state for cycle tourism. The main objectives are to:
Action Plan 2011 – 2015	Strengthen the supply of cycle tourism experiences     Puild consumer demand for such
	<ul><li>» Build consumer demand for cycle</li><li>» Attract and leverage events</li></ul>
	These objectives align with the BSW Cycle Tourism Strategy.
Victoria's 2020 Tourism	This state tourism plan recognises cycling as an important activity and strength for Victoria. Notes that the BSW region lacks a must-do overnight cycle trail.
Strategy	This aligns with this document that gives priority to the Twelve Apostles Trail and development of at least one other potential overnight trail in the region.
Barwon South West	This document assessed and prioritised walking, cycling and other multi-use trails in the BSW region. It forms the basis for developing this Cycle Tourism
Regional Trails Master	Strategy.
Plan 2009	

## **Market context**

## National participation in cycling

There are conflicting reports as to whether national participation in cycling is increasing, decreasing or static. The *National Cycling Participation Survey 2013* suggests that cycling participation decreased slightly between 2011 and 2013<sup>4</sup>. This is despite an upward trend in participation in cycling recorded by the ABS *Participation in Sport and Physical Activity Survey* that showed that cycling participation by those aged 15 and over increased from 6.5% in 2009/10 to 7.6% in 2011/12.

The inconsistency in the data is likely to stem from the way cycling participation is measured. Other relevant data suggests that participation rates are steadily increasing, although not at 15% per annum, the target set by the *National Cycling Strategy* 2011-2016. For instance, there was a record high of 1.4 million bicycles imported into Australia in 2012/13.

There is also growth in cycling to work (measured by the census in 2006 and 2011), although most of this activity occurs in the capital cities within 10 kms of the Central Business Districts. The census data suggests that cycling to work from outer suburbs has remained steady or decreased<sup>5</sup>.

## Cycle tourism

Just over 1 million domestic day-trippers went cycling in Australia in 2013, representing growth of 15% from the previous year and an annual average growth rate of 15% from 2006. This growth rate is much greater than the growth in day trips across Australia over the same period (5%). For domestic overnight visitors, approximately 1.5 million cycled while on holiday in Australia in 2013. This rate has remained stable since 2011, but grew steadily from 2006 when close to 900,000 domestic overnight visitors participated in cycling while on holiday. Victoria and New South Wales generate the lion's share of cycle tourism activity followed by Queensland, Western Australia and South Australia<sup>6</sup>.

In 2013, it was estimated that 314,120 international visitors went cycling while in Australia, representing growth of 6.5% on the previous year and an average annual growth of 11% from 2006. The percentage of international visitors who go cycling in Australia has increased at a much greater rate than the growth rate in international visitors over the same period  $(2\%)^7$ .

## Benefits of cycle tourism for BSW Region

Attracting cyclists to a tourism destination can result in spending that supports local businesses and local communities. Cyclists also tend to do more while on holiday when compared with other tourists, making them a stronger source of income for regional economies. This pattern of use has resulted in the diversification of the tourism product mix in some regional areas<sup>8</sup> as successful cycle tourism is dependent on the total tourism experience rather than just the cycling element. This includes where the trail is located, how easy it is to access, associated tourism products (such as places to see and things to do), whether there are good directions, signs and maps and secure places to store or park bikes. Bike-friendly places to stay overnight are also important.

Cycling events are a key economic driver and generate extensive media coverage throughout the world. Events attract competitors, officials and spectators (both overnight and day visitors) and have been acknowledged as providing tourism revenue for destinations. There are major benefits to the BSW region that would come from a larger cycle tourism sector:

- » Cycle tourists spend on accommodation, cafes, restaurants and shops while visiting a region and research suggests they are a high yield sector
- » Cycling as an activity for visitors can increase the length of their stay and hence their spend, creating opportunities for bicycle retail businesses, bicycle hire and tour operators
- » Increased participation in cycling will have health and other benefits for local communities.

<sup>&</sup>lt;sup>4</sup> Austroads, 2013 *National Cycling Participation Survey* 

<sup>&</sup>lt;sup>5</sup> Austroads, 2013 National Cycling Participation Survey

<sup>&</sup>lt;sup>6</sup>TRA 2014 NVS Domestic visitor cycle participation

<sup>&</sup>lt;sup>7</sup> TRA, 2014 NVS Domestic visitor cycle participation 8 TRC Tourism (2008), New Zealand Cycleway Market Research.

## Trends in cycling

### **Cycling culture**

As a result of the growing interest in cycling in Australia, community initiatives that enhance the social experience of cycling are springing up. There are growing numbers of bicycle shops that offer cycling workshops, cycling-themed get-togethers and community services like bike donations and bike fairs and bike markets. Bike cafes, where cyclists can take a break and connect with other people, are also growing in popularity.

### **Industry trends**

The bicycle retailing and repair sector has seen a significant boost in 2013/14, after a substantial decline as a result of the economic crisis. Not only are Australians increasingly taking up cycling for weekend recreation, but commuting by bike is also increasing. Overall, the bicycle retailing and repair industry in Australia is estimated to be worth \$925 million in 2013/14.

## Victoria's popularity

Victoria is becoming Australia's leading cycle destination. More people cycle in Victoria than in any other state<sup>9</sup>. It is highly organised in terms of state and regional level cycling organisations and clubs, events and plans for the development of road and offroad cycling. Just over a million Victorians ride a bike each week to commute to work or for leisure.<sup>10</sup> North-east Victoria has the greatest density of road and off-road trails (including rail trails) and cycle touring routes<sup>11</sup>, although it could be argued that the BSW region has a greater variety of terrain and spectacular landscapes for cycling.



<sup>&</sup>lt;sup>9</sup> Victorian Government, 2012, Cycling into the Future 2013-23, Victoria's Cycling Strategy

<sup>&</sup>lt;sup>10</sup> Victorian Government, 2012, *Cycling into the Future 2013-23, Victoria's Cycling Strategy* 

<sup>&</sup>lt;sup>11</sup> Tourism Victoria, 2011, Victoria's Cycle Tourism Action Plan 2011-2015.

## **Road cycling**

## Demand and supply for road cycling (events, training, cycle touring)

The BSW region has potential to be a leading road cycling region in Victoria<sup>12</sup>. Road cycle tourism in the region is currently dominated by major events such as the Melbourne to Warrnambool Classic, Amy's Gran Fondo, Great Ocean and Otway Classic, Great Victorian Bike Ride and Great South Coast Tour. These events draw riders, trainers, spectators and supporters from Victoria, Australia and overseas. Victoria is good at leveraging off these events and leading Australian riders, such as through the recently announced Cadel Evans Great Ocean Road Race. As well as the inaugural Elite Men's Road Race on Sunday 1 February 2015, this new major event will be preceded by an Elite Women's Road Race and People's Ride on Saturday 31 January, 2015.<sup>13</sup>

Events such as this encourage training and recreational riding in and around Geelong, Torquay, Warrnambool, between Colac and Camperdown, along the Great Ocean Road and inland to Ballarat by locals and visitors to the region. These cycling events bring significant economic benefits to the region.

Although data on road cycling is mostly incomplete, anecdotal accounts suggest that self-supported cycle touring on the regional road network is still in its infancy. The touring route promoted most to this market is along the Great Ocean Road<sup>14</sup>. Despite the promotion, the uptake is minimal, no doubt influenced by safer riding options elsewhere in Victoria's North East and in other states in Australia. Safety on the Great Ocean Road is an ongoing issue for most road riders.

At least four companies provide supported road cycle tours in the region for domestic and international visitors<sup>15</sup>. The only route used in the region is along the Great Ocean Road with most riding from Warrnambool to Melbourne on four to six - day packages, some taking the Sorrento ferry to include a final stage along the Mornington Peninsula.

All operators have concerns over road safety on the Great Ocean Road with some seeking alternative touring routes inland to minimise time spent on the Great Ocean Road.

Bike Safe and Vic Roads have identified Principle Bike Networks for the G21 sub-region and are currently extending this approach to the rest of the region. The main purpose of the Principle Bike Network is to improve cycle safety for commuters and recreational riders in areas having high traffic volumes. 'Share the Road' signs are being used increasingly on popular training rides such as the Wangoom circuit near Warrnambool and on back roads between Colac and Geelong.

Cyclists, cycle retailers and event organisers interviewed during preparation of this strategy suggest that there is no shortage of roads for riding in the region. Short to long rides are available with a variety of challenges to suit most riders.

An indication of the volume of road cycling and its distribution is illustrated overleaf in a Strava heat map illustrating relative density of road cycling (Figure 1). Worn by cyclists to record distances ridden and locations, it shows the bulk of activity occurring in and around Melbourne and the Mornington Peninsula, followed by Geelong, Torquay, the Great Ocean Road to Apollo Bay and lesser activity around Warrnambool and Portland. The light coloured areas represent a collation of data from riders wearing a Strava device. It can only be taken as an indication of cycling volume, not an absolute measure.

<sup>14</sup> Derived from analysis of websites and guide books promoting cycle touring in Victoria.

<sup>&</sup>lt;sup>12</sup> Although *Victoria's Cycle Tourism Action Plan 2011-2015* notes that Victoria's High Country and the Yarra Valley / Dandenong Ranges hold greatest strength for road cycle tourism.

<sup>&</sup>lt;sup>13</sup> Cycling Victoria, July Media Statement 2014

<sup>&</sup>lt;sup>15</sup> For instance, All Trails Bicycle Tours, Cycling Tours Australia, Global Adventure Guide, Pedaltours – two of these companies were recently sold to new owners.

Heleham THE OUT TO Victoria Stawells Grampians National Park Postline Post Fally Warmamboo

Figure 1: Strava heat map for relative density of road cycling in the BSW region

## Market segments - road cycling

The road cycle tourism market is also quite diverse. It can be segmented into four broad categories based on motivations or ideal ride criteria and levels of service required as illustrated in Table 2.

These segments can overlap with each other. For instance, on one visit an elite rider could visit BSW to train and, on another, he/she could be there with their family undertaking easier, shorter rides. The Matching Rides noted here are those most often promoted via Regional Tourism Organisations, cycling groups, cycle tour operators, cycling websites such as Cycle Map.net and Cycling Victoria.

Table 2: Market segments - road cycle tourism

SEGMENT	IDEAL RIDE CRITERIA LE	EVEL OF SERVICE	MATCHING RIDES IN THE REGION
Visiting trainer / elite riders (Experienced amateur and professional riders)	<ul> <li>Presence of national / international event circuits</li> <li>Mix of flat and hill riding</li> <li>Range of lengths from 50 km to over 120 km (century 100 km and 160 km courses preferred by top riders)</li> <li>Personal icon challenges such Everesting and Strava bagging</li> <li>Events such as the Melbourne to Warrnambool Classic, Tour of the South West</li> </ul>	Sealed roads. Traffic warning signs for cyclists. Road closures for events (fixed or rolling closures). Strong word of mouth amongst these riders so less dependence on destination marketing and information and more on social media channels. Low traffic volumes preferred but not essential.	<ul> <li>Geelong Lorne Rainforest Ride</li> <li>Great Ocean Ride</li> <li>Wangoom Circuit, Warrnambool</li> <li>Bellarine 100</li> <li>Geelong Torquay Loop</li> <li>Round the Grampians</li> <li>Port Fairy to Dunkeld</li> <li>Events such as Melbourne to Warrnambool, Great South Coast Tour, Amy's Gran Fondo, Great Ocean and Otway Classic, Great Victorian Bike Ride</li> </ul>
Cycle tour - independent	<ul> <li>Winding country roads with great scenery and contrasting landscapes</li> <li>Variety of terrain from flat, rolling and short steep hills</li> <li>Small towns and points of interest along the way</li> <li>A challenging journey such as Geelong to Portland or Warrnambool to Geelong via inland roads</li> </ul>	Sealed roads. Traffic warning signs. Largely self-contained but require good cycle touring map information, bike friendly places to camp (informal roadside and formal campgrounds, farm stays, B&B's, lodge or motel style accommodation).  Preference towards low traffic volumes but can tolerate high volume traffic in some areas. Need good train, bus or shuttle transport out of Melbourne.	<ul><li>» Great Ocean Road</li><li>» Great Ocean Road to Grampians</li></ul>
Cycle tour - supported	<ul> <li>Group fun as important as the ride</li> <li>60 km to 80 km rides per day</li> <li>Great scenery and variety of terrain</li> </ul>	Professional operator with support gear and transport. Affordable, quality mid-range accommodation. Sealed roads. Plenty of points of interest along the way.	<ul> <li>» Great Ocean Road (the only ride in BSW provided by road cycle tour operators)</li> <li>» The Great Victorian Bike Ride</li> </ul>
Weekend riders	<ul> <li>» Rides up to 70 km on average</li> <li>» Scenic coastal and rural landscape</li> <li>» Motivation varies from keeping fit, social occasion, family time, soft adventure</li> </ul>	Low traffic volumes important consideration. Sealed roads and shoulders preferred. Bike friendly cafes and picnic areas are popular. Cellar doors where available. Often carried out from holiday homes or commercial accommodation in towns such as Lorne, Apollo Bay, Port Fairy, Port Campbell, Dunkeld and Torquay. Good bus and train transport to and from ride destinations.	<ul> <li>Geelong – Queenscliff – Barwon Heads</li> <li>Torquay to Anglesea</li> <li>Apollo Bay – Lorne</li> <li>Wangoom Circuit</li> <li>Around the Grampians</li> <li>Apollo Bay – Forrest – Birregurra – Deans Marsh – Lorne</li> </ul>

## Trends and Opportunities - Road Cycling

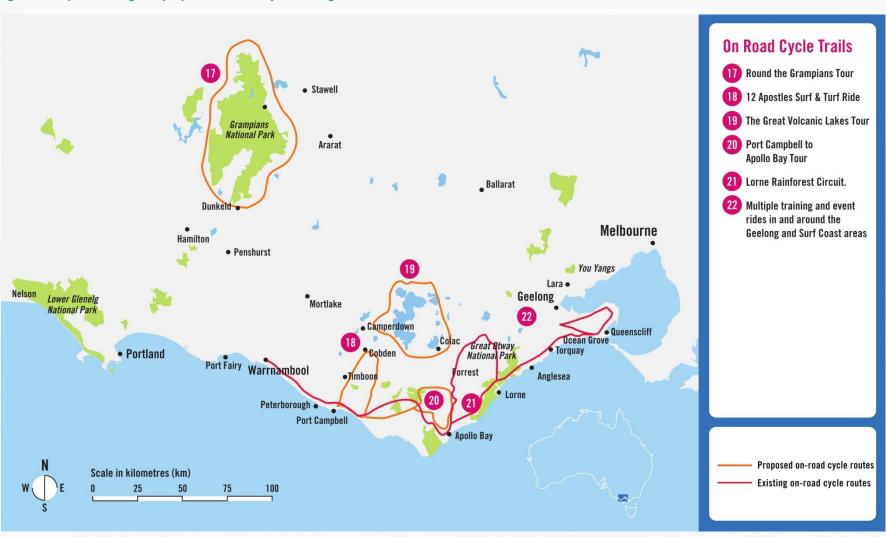
Road safety issues, the dominance of the Great Ocean Road and circuits close to Geelong are some of the challenges for growing road cycle tourism in the region. While the Great Ocean Road and Geelong area will continue to hold a strong position, the Strategy identifies other opportunities to spread cycle tourism around the region. These are outlined in Table 3. They include touring, training and some themed routes that would appeal to the market segments identified earlier. A key ingredient for these routes is to provide riders with an opportunity to experience more of unique natural and rural landscape character of the region. To stimulate demand for road cycling, it is essential that the region further develops its product offering. This includes identifying and addressing major product gaps, developing cycling infrastructure and complementary products, including cycle friendly accommodation and touring product.



Table 3 Road Cycling - Supply Gaps and Growth Potential

MARKET SEGMENT	SUPPLY GAPS AND GROWTH POTENTIAL	OPPORTUNITIES
Visiting trainers and elite riders	Data on this segment is incomplete. Anecdotally participation in major events appears steady to increasing. It is assumed that most visiting riders to BSW know where to ride through word of mouth. Training routes around Geelong and the Surf Coast will remain important due to the size and proximity of the local population as well as visiting interstate and intrastate riders. An opportunity worth testing is whether it is possible to attract more riders to train on event circuits or other popular training rides through direct marketing to other Australian cycle networks, guest editorials and offering packaged travel, shuttle and accommodation to riders outside of Victoria. This market appears to have good growth potential.	<ul> <li>Further promotion of popular circuits Great Ocean Ride, Bellarine 100, Geelong – Barwon Heads – Drysdale, Geelong – Barrabool, Geelong – Torquay, Geelong – Lorand Geelong – You Yangs</li> <li>200km Badge of Honour ride from Port Campbell - Lavers Hill -Apollo Bay - Skenes Creek - Turton's Track – Beech Forest – Port Campbell. Needs to be started early to avoid post lunch traffic build up. Option to start/finish at Apollo Bay. Western end road has peak traffic flow that can accommodate safer rides that start earlier in the day</li> </ul>
Cycle tour - independent	Very little is known about this segment for the region. The most popular touring route is along the Great Ocean Road with occasional diversions inland to towns such as Colac, Dunkeld, Hamilton and Timboon. Most touring guides for Victoria focus on rail trails and the Alps. The Lonely Planet guide to cycling in Australia promotes the Great Ocean Road, the Alps and gold towns between Melbourne and the Grampians. Hinterland rides through the Great Otway National Park are not promoted but have good potential for cycle touring. This is a small market for BSW region with limited growth potential.	<ul> <li>A proposed Great Volcanic Lakes route encompassing Lake Corangamite, Lake Bulle Merri/ Gnotuk, Lake Purrumbete meandering between Camperdown and Colac as starting points and potential finishing points (if not treated as a circuit)</li> <li>Builds on strong Camperdown cycling fraternity with rail links to Melbourne and Geelong. High scenic values. Needs 'share the road' signs as shoulders not present some sections</li> <li>The area from the Princess Highway to the coast has long-term potential as a 'Michigan Style' riding precinct where road cycling can share roads that have been improved for the dairy industry</li> </ul>
Cycle tour - supported	Supported cycle touring is growing internationally. The Great Ocean Road is the only supported ride offering by cycle tour operators in the BSW region. Elsewhere in Victoria, local and international operators run trips through the Victorian Alps, Murray to Mountains and on the Great Victorian Rail Trail. This market appears to have further growth potential that could be leveraged by cycle tour operators working closely with BSW's Regional Tourism Organisations.	A proposed Apostles Surf and Turf Ride in a clockwise direction is a 78km "Pedalicious" opportunity. Travelling past 7 gourmet opportunities and taking in 22km of the Great Ocean Road. Clockwise direction would limit risk on the Great Ocean Road between Port Campbell and Cobden – Princetown Road
Weekend riders	It is estimated that the largest segment of road riders are made up informal groups of riders and individuals who ride on weekends in events, for training, keeping fit and social occasions. Increasingly, families and couples are taking bikes with them on short-breaks to the BSW region and riding from locations such as Port Fairy, Port Campbell, Warrnambool, Apollo Bay, Dunkeld, Halls Gap and Lorne. In general they have concerns over road safety and will curtail or substitute rides to other areas where there is less traffic. It is often reported that there are not enough warning signs for motorists. This is largely due to the lack of adequate shoulders to ride along on rural roads. Word of mouth including social media is the most common way in which they find out about rides. Circuit maps and guides are also commonly used to check distances and hazards. Some of the more serious weekend riders prefer to ride part or all of an event circuit.	<ul> <li>A round the Grampians circuit starting and finishing at Dunkeld</li> <li>Apostles Surf and Turf Ride (as for cycle tour – supported)</li> </ul>

Figure 2: Map of existing and proposed on road cycle touring routes



## Off - road cycling

## Supply for off-road cycling

Victoria's Cycle Tourism Action Plan has identified the BSW region as having a primary product strength in 'tracks and trails' particularly relating to its purpose built mountain bike tracks in Forrest and the You Yangs and the Bellarine Rail Trail.

These trails are also recognised by the *Victoria's Trails Strategy 2014-24* and by the *Growing Adventure Tourism in BSW region* trails project. The aim of Victoria's Trails Strategy is to prioritise investment in trails that will position Victoria as a leading destination for walking, biking, endurance events and horse riding. The aim of the BSW adventure tourism project is to prioritise investment in trails in the region to strengthen its position as a leading nature and adventure destination in Australia. It categorised its regional trails into leading and supporting trails:

- » Leading trails trails that are, or have the potential to be, outstanding trails that will be the flagships for the adventure trails destination. They will form the core adventure trails offering and attract investment priority. These align with International and national significant trails and State significant trails.
- Supporting trails trails with a less prominent visitor offering or potential, but which nevertheless provide a quality visitor experience to support the Leading Trails, extend the length of stay and offer significant recreational opportunities for regional communities. These align with the Regional and local significant category used in Victoria's Trails Strategy 2014–24.

Table 2 shows the relationship between the trail categories described in the *Victoria's Trails Strategy 2014-24* and by the *Growing Adventure Tourism in BSW region* trails project and their relevance for cycle tourism.



**Table 4: Comparative trail categories** 

TRAIL	VICTORIA'S TRAILS STRATEGY	BSW ADVENTURE TOURISM
Great Ocean Walk	International - walking	Leading
Surf Coast Walk	State significant – dual use	Leading
Twelve Apostles	Proposed State significant cycling	Proposed Leading
Grampians Peaks Trail	Proposed International - walking	Proposed Leading
You Yangs MTB Hub	State MTB hub	Leading hub
Forrest MTB Hub	State MTB hub	Leading hub
Anglesea MTB network	NA	Supporting hub
Great South West Walk	State significant - walking	Supporting (shorter 3 Bays 3 Days section could become Leading)
Bellarine Rail Trail	NA	Supporting
Geelong Waterfront	NA	Supporting
Barwon Heads and Parklands	NA	Supporting
Old Beechy Rail Trail	NA	Supporting
Port Fairy to Warrnambool Rail Trail	NA	Supporting
Warrnambool Foreshore	NA	Supporting
Glenelg River Trail	NA	Supporting

## **Demand for off-road cycling**

The following observations are made on the match between the demand for, and supply of, off-road cycle tourism in the region. Due to the lack of data on off-road cycling, these observations have been compiled mainly through interviews with land managers, council officers, local tourism businesses and off-road riders:

### Urban and rail trails are increasing in popularity

Anecdotally, the Bellarine Rail Trail, Geelong Foreshore, Warrnambool Foreshore, Barwon Heads and Parklands, Old Beechy Rail Trail and Port Fairy to Warrnambool Rail Trail appear to be getting more use. These provide important regional and local benefits for health, recreation and community wellbeing. They also provide an important opportunity for first-time riders (especially families) to safely get into cycling.

### There is a lack of an overnight off-road trail

There is no cycling equivalent to the Great Ocean Walk and yet it is perceived that there will be demand for a ride that showcases this stunning coastal landscape. A working assumption is that because of safety issues along the Great Ocean Road there is latent demand for a safe cycling trail along the coast.

## The region's two main mountain biking hubs will need ongoing expansion and renewal to remain relevant

Mountain bike trails at Forrest and the You Yangs have developed in response to growing demand for downhill, endurance, event and circuit mountain biking. Over 115,000 riders were recorded using the You Yangs in 2013. Eight kilometres of new trails opened in the last 12 months in the You Yangs and at least 10 km of existing trails have been upgraded in the last three years. Competing destinations such as Mt Buller in North East Victoria and in New Zealand, Rotorua, Taupo and Queenstown have expanded to the point where there is twice as much trail available than in the You Yangs or Forrest. Both hubs have room to develop additional trails that are different to the trails in the existing network and, in doing so, generate greater economic impact.

The village of Forrest has been rejuvenated due to mountain biking but further trail options are needed for the town to grow as a mountain biking hub. The village of Lara, close to the You Yangs, has very limited business activity and employment linked to this hub. Most riders to these locations will return provided there is increasing choice of what and where to ride and accommodation options. Forrest in particular has all the attributes for a world-class mountain biking destination -village, rustic and authentic atmosphere with potential for a large trail network.

# There is potential to work towards attaining IMBA-endorsed cycle destination status in the region

The first and only IMBA-recognised trail in Victoria is the Australian Alpine Epic Trail at Mt Buller (also ranked as a Bronze Level Ride Centre). There is a strong argument that the BSW region should aspire for one or more IMBA-endorsed trail experiences in order to achieve its vision of being the premier trail destination in Victoria. IMBA trail categories include:

### **Ride Centres**

These are large-scale mountain bike destinations that offer a wide range of great trails for every riding style. These destinations have accommodation, food outlets, bike hire and repair, transport services and a large trail network on offer. They are large enough to offer several days' worth of riding from one location. Examples include Mt Buller, Victoria; Lake Taupo, New Zealand; Santa Fe, USA; Silver Star Resort, British Columbia, Canada and the Teton Region, Jackson, USA.

### **Epics**

Epics are demanding singletrack adventures in a natural setting. They are technically and physically challenging and must have more than 80 percent singletrack and be at least 35 km in length. Examples include the Australian Alpine Epic Trail; Cannell Trail, Sherman Pass, California; and the Upper Buffalo Trail, Arizona.

### **Flow Trails**

IMBA's description says it all: "Flow Trails take mountain bikers on a terrain-induced roller coaster experience, with little pedalling and braking necessary. This style of trail typically contains features like banked turns, rolling terrain, various types of jumps, and consistent and predictable surfaces. Conspicuously absent are abrupt corners or unforeseen obstacles." These trails are suitable for a wide range of riders and abilities and take careful and exacting construction to create the feeling of flow.

### **Community Bike Parks**

These parks are designed to accommodate a variety of skill levels, typically in more urban environments where riders can learn skills, tricks and progress from one challenge to another.



## Market segments for off road cycling

As with road cycling, the markets for off-road cycling are diverse but not mutually exclusive. There is a lot of overlap amongst different riding styles. Table 5 provides an analysis of off-road market segments and the supply of trails in the region.

Table 5: Market segments - off-road cycle tourism in the BSW region

SEGMENT	IDEAL RIDE CRITERIA	LEVEL OF SERVICE	MATCHING RIDES IN THE REGION
Social trail	» Riding with groups of friends and family	Rail trails and formed trail surfaces. Single	» Bellarine Rail Trail
riders	important	track is suitable as long as it is well graded	» Old Beechy Rail Trail (for families with children 12 years or older)
	» Day and overnight trips are sought after	and maintained. Require good	» Surf Coast Walk
	» Up to 50 km a day on easy to moderate	information online and print. Rustic to	» Anglesea MTB trail network
	terrain	mid-range accommodation when doing	» Forrest
	» Seeking a challenge but nothing too risky or	overnight trails. Cafes, cellar doors,	» Camperdown to Timboon Rail Trail
	extreme	historic sites and small towns/villages	» Warrnambool Foreshore
	» A sense of adventure and achievement is	along the journey.	» Geelong Waterfront
	important		» Barwon River Trails
	» Scenery and points of interest very important		» Port Fairy to Warrnambool
			» Warrnambool Foreshore
			» Non-competitive events
Families	» Easy and varied terrain with occasional	Rail trails and formed trail surfaces. Single	» Bellarine Rail Trail
	challenges (bridges, hills, exposed sections,	track is suitable as long as it is well graded	» Old Beechy Rail Trail (for families with children 12 years or older)
	stream crossings)	and maintained. Good signs and on-site	» Surf Coast Walk
	» Safe	interpretation. Preferably no or limited	» Camperdown to Timboon Rail Trail
	» Up to 35 km per day on average	time on sealed roads – certainly not busy	» Warrnambool Foreshore
	» Points of interest, views, places to rest to	highways. Minimise crossing main roads.	» Geelong Waterfront
	break the journey up and keep kids interested		» Barwon River Trails
	in their surroundings		» Port Fairy to Warrnambool
			» Warrnambool Foreshore
			» Anglesea MTB trail network
			» Forrest

SEGMENT	IDEAL RIDE CRITERIA	LEVEL OF SERVICE	MATCHING RIDES IN THE REGION
Middle aged males (also known as MAMILS <sup>16</sup> )	<ul> <li>Trail hub, network or single journey with a mix of challenges from easy to difficult</li> <li>Main driver is being somewhere with mates doing a mix of riding, sightseeing and other activities</li> <li>Happy to ride the same trails several times if visiting a hub and do something different on the same day</li> <li>Will ride anywhere between 20 km and 100 km per day</li> </ul>	Extensive trail network or singular journey. Will make repeat visits if riding is considered great value. Budget to mid-level accommodation with good local cuisine, beverage and other attractions/activities on offer. Single track preferred. Dirt roads and short sections of sealed road tolerable but a turn-off if more than 5km worth. Good transport services for drop-off and pick up points.	<ul><li>You Yangs</li><li>Forrest</li><li>Anglesea MTB trail network</li></ul>
Schools, corporates and other special interest groups	<ul> <li>Consistent surface that is reasonably easy to ride</li> <li>Approximately 8 km to 20 km</li> <li>Opportunity to ride in groups, socialise, have fun and learn bike skills</li> <li>Attractive scenery</li> </ul>	Good transport services and bike hire. Experienced instructors, guides and areas that can cater for large groups of up to 30 riders.	<ul> <li>» Surf Coast Walk</li> <li>» You Yangs</li> <li>» Forrest</li> <li>» Anglesea MTB trail network</li> <li>» Old Beechy Rail Trail</li> <li>» Bellarine Rail Trail</li> <li>» Barwon Heads and Parklands</li> </ul>
Downhill specialists	<ul> <li>Long rides preferred</li> <li>Can walk, bike or fly into start points</li> <li>Strong desire for excitement, challenge, skill development, speed and sense of adventure</li> <li>Competitive and non-competitive elements amongst this market</li> </ul>	Downhill tracks of varying difficulty. Sweeping corners. Mix of straight runs, switchbacks and jumps.	» You Yangs
Endurance trail riders	<ul> <li>Strong desire for challenging terrain, steep climbs and descents, tight and sweeping corners, long-distance rides including at night</li> <li>Will travel far to destinations offering rides of up to 75 km per day</li> <li>Mix of competitive and non-competitive riders</li> </ul>	EPIC trails. Networks and long-distance rides on mostly single track and, to a lesser extent, farm roads, firebreak roads/management trails and former logging tracks.	<ul><li>» Forrest</li><li>» You Yangs</li><li>» Anglesea MTB trail network</li></ul>
Technical skills and trick riders	<ul> <li>Challenge and skill development are strongest motivators</li> <li>Prefer natural and built obstacles, downhill sections</li> </ul>	Extensive built structures with mix of difficulty. Trail networks at a single destination preferred.	<ul><li>You Yangs</li><li>Forrest</li><li>Anglesea MTB trail network</li></ul>

 $<sup>^{\</sup>rm 16}{\rm MAMILS}$  is an acronym for 'middle aged men in lycra'.

## Trends and Opportunities - Off-road Cycling

To stimulate demand for mountain biking, it is essential that the region further develops its product offering. This includes identifying and addressing major product gaps, developing cycling infrastructure and complementary products, including cycle friendly accommodation and touring product. The diversity mountain biking terrain in the region has the potential to act as an economic catalyst for new accommodation and tourism businesses.

Table 6 summarises the supply gaps and growth potential for off road cycling in the region. An iconic overnight trail ride showcasing BSW region's coast, hinterland and forested landscapes is possibly the biggest game-changer for the region. It would appeal to a wide range of markets, support the region's vision for adventure trails and generate economic benefits.

There are two possibilities for achieving an iconic overnight ride. The first involves the planned extension to the Twelve Apostles Trail connecting Camperdown to the Great Ocean Road. That would have broad market appeal. Another alternative is to explore the possibility of establishing an Epic Trail to link the coastal nodes of Torquay, Lorne and Apollo Bay. This would appeal more to experienced riders such as Middle Aged Males, Endurance Riders and some Social Trail Riders. An important first step towards establishing an Epic Trail would be to make the Surf Coast Walk dual use along its entire length.

Another other priority for the region is to extend the size and quality of trail networks at Forrest and the You Yangs. Competitor destinations such as Rotorua, Taupo and Queenstown have trail networks twice the size of Forrest and You Yangs. Without increased investment in these mountain bike hubs, the region will be out-competed by other cycling destinations in Victoria and elsewhere. Investment is likely to attract off road cycling events to the region with significant economic benefits if the trails are promoted and packaged appropriately. There is also the opportunity to provide and package accommodation and services to riders to build yield.

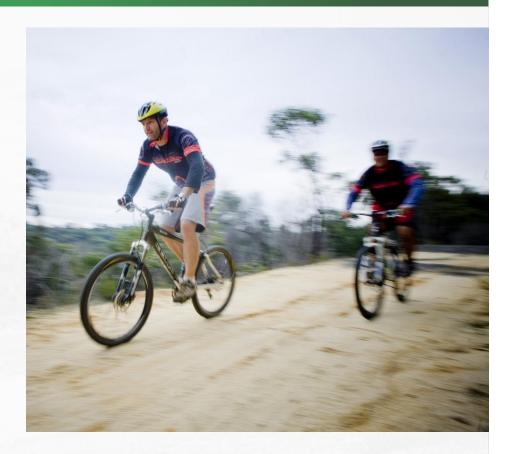


Table 6: Supply gaps and growth potential for off-road cycle tourism in the BSW region

MARKET SEGMENT	SUPPLY GAPS AND GROWTH POTENTIAL	OPPORTUNITIES
Social trail riders	This segment has been growing rapidly over the last decade and looks set to continue. There is no Great Ocean Ride equivalent to the Great Ocean Walk and thus these riders frequent the Surf Coast Walk, easier trails at Forrest and in the You Yangs and other trails such as Old Beechy and Bellarine Rail Trails. There is a lack of an overnight ride in the region that could generate further economic benefit from this segment (equivalent to the Great Victorian Rail Trail or Murray to Mountains Rail Trail). The proposed Twelve Apostles Trail linking Camperdown to the Great Ocean Road would appeal to this market.	<ul> <li>The proposed Twelve Apostles Trail will have strong appeal to this market</li> <li>Making the Surf Coast Walk dual use</li> <li>Anglesea MTB trail network</li> </ul>
Families	Anecdotally the family market continues to grow. This segment is reasonably well catered for in the region with a number of rail trails and waterfront rides available although an easy overnight ride would also appeal.	<ul> <li>The proposed Twelve Apostles Trail would appeal to this market</li> <li>Anglesea MTB trail network</li> </ul>
Middle aged males (also known as MAMILS <sup>17)</sup>	Anecdotally this is one of the quickest growing segments of the market with substantial potential for further growth. Moderate to high-spending pattern. Typically aged 30 to 50 years. Will travel far for good riding experiences (e.g. Sydney to Rotorua/Taupo and Queenstown, Melbourne to Melrose, SA). A mix of professional and trade backgrounds. Always looking for new rides although will make repeat visits to good destinations such as Forrest and You Yangs. An important market for the BSW region.	<ul> <li>Twelve Apostles Trail</li> <li>Extending and improving the Forrest and You Yangs network of trails</li> <li>Anglesea MTB trail network</li> <li>An Epic Ride between Lorne and Apollo Bay</li> </ul>
Schools, corporate groups and other special interest groups	A localised market for Geelong and to a lesser extent Warrnambool due to proximity of nearby trails. Corporate groups using cycling for team building and personal skill development. There are approximately four cycle/ adventure tour operators in the BSW region catering to this market. Growth potential is considered to be moderate to good although spending pattern in the local economy is limited due to packaged arrangements with cycle tour operators.	<ul> <li>Surf Coast Walk (especially if made dual use along the entire length)</li> <li>You Yangs</li> <li>Rail trails</li> <li>Anglesea MTB trail network</li> </ul>

 $<sup>^{\</sup>rm 17}{\rm MAMILS}$  is an acronym for middle aged men in lycra

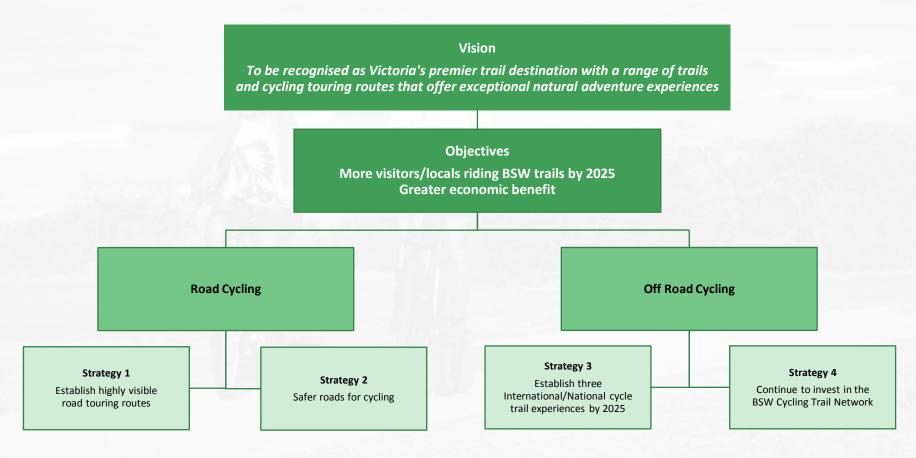
MARKET SEGMENT	SUPPLY GAPS AND GROWTH POTENTIAL	OPPORTUNITIES
Downhill specialists	This is a niche segment with specific requirements for steep and variable downhill rides. The You Yangs is the only formally managed trail network in the region having a range of trails suited to downhill riders. These riders also use private land and other locations. The size and growth potential of this segment has not been determined at this point. Downhill riders are often part of local trail building groups.	<ul> <li>Extending and improving the range of downhill rides in the You Yangs</li> <li>Adding downhill and Flow Rides to Forrest</li> </ul>
Endurance trail riders	Endurance trail riders can also appear as Social Trail Riders depending on their life stage. They are regular users of the You Yangs, Forrest and Anglesea MTB hubs, Surf Coast Walk and other trails in the Great Otway National Park. They are generally always looking for new trails to ride. An EPIC trail (similar to the EPIC trail developed at Mt Stirling/Mt Buller) between Lorne and Apollo Bay via Great Otway National Park and Forrest has been raised by this market as an opportunity worth exploring further. This is particularly so as there are many existing trails and dirt roads through the forest that could be designated / converted to bike use. Endurance riders are often voluntary trail builders and carry out essential maintenance with Parks Victoria and the Department of Land, Water, Environment and Planning.	<ul> <li>Expanding and improving the Forrest network of trails</li> <li>Exploring the development of an Epic Trail between Torquay and Apollo Bay</li> </ul>
Technical skills and trick riders	A niche segment that has grown rapidly over the last decade. Considerable overlap with downhill riders. Have the potential to ride almost anywhere. The You Yangs and to a lesser extent Forrest are the only areas in the region (outside of skate and bike parks) that cater for these riders.	<ul><li>» Extensions to You Yangs and Forrest</li><li>» Further development of Anglesea MTB trail network</li></ul>

Figure 3: Map of off-road cycle trails in BSW



## **Strategy and guiding principles**

For the BSW region to become one of Victoria's leading cycle tourism destinations where visitors will experience world class trails, touring routes and events it will need to address the gaps and leverage the opportunities identified in this strategy. The following strategies will contribute towards achieving the vision and objectives.



## **Guiding Principles**

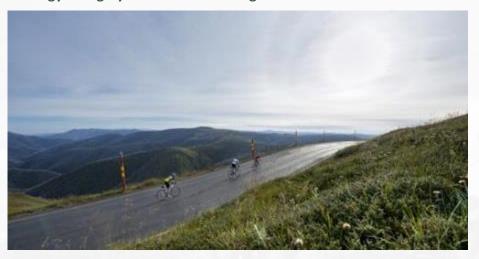
## In implementing this strategy, the following principles apply:

- 1. The quality of the visitor experience will remain at the centre of BSW's road riding and off-road trails
- 2. Touring routes and off-road trails will be designed and maintained in an uncompromising way to match infrastructure, facilities, support services and information to the intended markets
- 3. Provision of road and off-road cycle opportunities will adhere to the vision for BSW region and provide social, economic and environmental benefits.



## Strategies for road cycling

**Strategy 1: Highly visible road touring routes** 



### What is the issue?

Apart from the Great Ocean Road, there is very little marketing or information aimed at attracting cycle tourists to ride in the BSW region. The best variety of scenery, proximity of villages and towns for overnight accommodation lies along the Great Ocean Road and between it and inland areas such as Timboon, Camperdown, Colac and Forrest. Warrnambool, Apollo Bay and Lorne are important hubs along the Great Ocean Road providing important start and finish points for inland and coastal touring.

Further touring routes suitable for training, supported riding, independent touring and weekend riders are identified opposite. These require further verification by tour operators, expert local riders, Bike Safe and Vic Roads. After that, the agreed list can be prioritised for marketing and promotion.

Highly visible touring routes also require a range of associated services. These include improved bike carriages on public transport, bike racks for rental cars, provision of bike storage, repair and hire services along touring routes, becoming a *Bike Friendly Region* through business collaboration and offering of cycle tour packages.

### **Actions**

- 1. Endorse and promote the following touring route experiences:
- 1.1 The Lorne Rainforest Circuit<sup>18</sup> for training, weekend riders and independent bike tours
- 1.2 A 160 km Badge of Honour route including Princetown, Lavers Hill, Apollo Bay, Skenes Creek, Turton's track, Lavers Hill, Princetown for visiting trainers and independent cycle tourists
- 1.3 Apollo Bay, Skenes Creek, Turtons Track, Lavers Hill, Apollo Bay for visiting trainers and independent cycle tourists
- 1.4 A Great Volcanic Lake route including Lake Corangamite, Lake Bullen Merri/ Gnotuk, Lake Purrumbete meandering between Camperdown and Colac for training and independent cycle tourists
- 1.5 A Round the Grampians circuit for weekend riders and supported cycle groups
- 1.6 A proposed 78 km Twelve Apostles Gourmet route for supported cycle groups and weekend riders
- 2. Provide consistent online cycle touring information via the region's main tourism promotional websites covering:
- 2.1 Detailed route descriptions with map sections for the sign-posted cycle routes
- 2.2 Theme pages for inspiration
- 2.3 Good cycle route advice and tips
- 2.4 Map sections showing sights and themes
- 2.5 Index of accommodation, cycle repairs and bicycle rental
- Develop a touring route sign system for riders that links with online cycling information. This would include:
- 3.1 Route names or symbols at the main start/finish points
- 3.2 Markers at key intersections, turn-offs or road junctions
- 3.3 Road safety signs for motorists

<sup>&</sup>lt;sup>18</sup>Geelong Otway Tourism (2012), Great Ocean Rides.

- **4.** Advocate for and collaborate with local businesses for BSW region to become a *Bike Friendly Region* with a focus on the main touring routes. This will involve providing:
- 4.1 Bike racks available from rental car companies
- 4.2 Bike storage on passenger train and coach services
- 4.3 Complimentary water for cyclists where appropriate
- 4.4 Shuttle services to pick up and drop off riders
- 4.5 Consistent touring route maps and route descriptions online and in print
- 4.6 Bike racks or secure bike storage at the main stopping places/towns/villages along the touring routes in response to demand
- 4.7 Cycling packages to make it easier for visiting riders to book and travel
- 4.8 Actively encouraging informal business networks along cycle touring routes

## Visit Scotland - Cyclists Welcome Program

Cyclists and mountain bikers staying in Scotland benefit from Visit Scotland's Cyclists Welcome program which aims to ensure that participating accommodation venues offer a range of specified services designed to attract cyclists. Over 1,000 establishments now participate in the program and offer the following in addition to normal services:

For full-service accommodation:

- » a separate space available for drying outdoor clothing and footwear so clothes can dry overnight
- » a lockable covered shed for bike storage
- » details of the nearest bike shop
- » a hot drink available on arrival
- » a late evening meal (available until 8pm) if there are no other restaurants or cafes within one mile; a late night snack offered after 8pm
- » early breakfast option from 7am, or for very early leavers a tray the night before
- » a packed lunch and a filled water bottle, if requested
- » a supply of information on local bike routes, local public transport and a weather forecast for visitor reference.

For self-catering accommodation and hostels:

- » a separate space available for drying outdoor clothing and footwear so clothes can dry overnight
- » a lockable covered shed for bike storage
- » details of the nearest bike shop

## **Strategy 2: Safer roads**



### What is the issue?

Most roads used by cycle tourists in the region have safety issues. These include blind corners, narrow roads, lack of shoulders and high traffic volumes. The most promoted touring route – the Great Ocean Road – is generally perceived as being unsafe particularly from late morning to late afternoon. Many independent and supported riding groups ride it west to east to avoid heavy traffic. It is thought that many potential cycle tourists avoid the Great Ocean Road and ride elsewhere due to the perceived risk, although there is no firm data available to confirm this.

Bike Safe, Vic Roads, BSW local authorities and cycle clubs are all working towards safer roads. These efforts need ongoing support and recognition to ensure safe riding experiences in the region. Safety information is becoming more widespread through installation of traffic warning signs ("Cyclists" and "Share the Road") and with information provided online and in print media.

VicRoads is currently using speed management in some of the high risk sections of road to improve the conditions for cyclists. VicRoads is focussing currently on the Great Ocean Road between the Arch and Lorne, including treatment of isolated crash zones with pavement works and speed limits. Further to this, the Shipwreck Coast Master Plan recommends more cycling in the hinterland between Port Campbell and Princetown. If implemented, this will mean more cyclists on narrow country roads.

To minimise the crash risk as a result of more road touring cyclists, there will need to be an increase in driver education, cycle warning signs and preferably cycle lanes or wider shoulders and passing lanes. These actions are needed for all road cycle tourists, not just elite riders.

### **Actions**

- 1. Better traffic warning signs, passing lanes and shoulders along:
- 1.1 Great Ocean Road
- 1.2 Wangoom Circuit
- 1.3 The Lorne Rainforest Circuit
- 1.4 The touring/training route between Princetown, Lavers Hill, Apollo Bay, Skenes Creek, Turton's track, Lavers Hill and Princetown
- 1.5 Apollo Bay, Skenes Creek, Turtons Track, Lavers Hill, Apollo Bay
- 1.6 The proposed Great Volcanic Lake route including Lake Corangamite, Lake Bullen Merri/ Gnotuk, Lake Purrumbete meandering between Camperdown and Colac
- 1.7 The Round the Grampians circuit
- 1.8 The proposed Twelve Apostles Gourmet route
- 1.9 Queenscliff to Torquay (Queenscliff Fort and Lighthouses)
- 2. Ensure recognition of these routes in any review of the Principle Bike Network for BSW region by Vic Roads and Bike Safe
- 3. Monitor use of the touring routes and share data with Vic Roads
- 3.1 Encourage visiting cycle tourists and local cycle networks to use the Strava data system to record activity on the recommended touring routes
- 3.2 Use social media, cycle club networks and marketing material to encourage visitors to record and upload cycle routes on Strava so that this information can be shared with VicRoads and factored into planning and annual road maintenance plans.

## Strategies for off road cycling

# Strategy 3: Establish three international/ national cycle trail experiences by 2025

### What is the issue?

The BSW region aspires to become Victoria's premier cycle trail destination. Currently, it lacks the range of trail riding opportunities to claim that ground but there is potential to gain national and possibly international recognition. That could be achieved by continuing to invest in the best opportunities that already exist and which set the region apart from other destinations.

Many of the region's cycle trails are located in urban or semi-urban environments. Trails such as the Bellarine Rail Trail, Barwon Heads and Parklands, Geelong Waterfront, Surf Coast Walk and Warrnambool Foreshore are popular with local communities but not enough of a drawcard to attract visitors primarily for riding. In keeping with the region's vision for trails, more will need to be made of existing and potential new trails that journey through BSW's natural, wild and rugged landscapes. The close proximity of a scenic coastline with forested, steep and undulating hinterland with small towns spread throughout is a point of difference for the region and an important source of adventure for visitors.

A bold aspiration would be for the region to have three trail riding experiences of national or international significance. That would help achieve the vision for BSW's trails. Potential already exists. This centres on establishing a significant overnight trail ride and in extending the trail networks at Forrest and the You Yangs. In terms of point-to-point trail experiences, only the Great Ocean Walk is ranked as having international / national significance by Victoria's Trails Strategy. There is no equivalent 'Great Ocean Ride' to rival the likes of the Murray to Mountains Rail Trail or Great Victorian Rail Trail, although the planned Twelve Apostles Trail has potential to become the region's premier overnight trail experience. It would appeal to a wide audience and leverage further commercial opportunities for the region. Critical success factors are workable transport linkages and a trail alignment that gives cyclists an outstanding experience between Camperdown and Timboon and between Timboon and the Twelve Apostles coastline.

Should the investment proceed, there should not be any compromise made in terms of trail standard, support services and the overall experience of being a journey from the hinterland to the coast.

In terms of cycle hub or destination-riding experiences, the You Yangs and Forrest are currently recognised as State Significant mountain bike hubs. Potential to expand both areas has been identified by Parks Victoria, the Department of Environment, Land, Water and Planning and a small selection of regular users and businesses associated with both areas. Indeed, there is potential for Forrest and the You Yangs to gain national and international recognition with further improvement to existing trails and extension of new trails. Trails plans have been developed for both MTB hubs to achieve this objective.

A longer - term option will be to assess the feasibility of establishing an Epic Ride between Torquay and Apollo Bay. There may be potential to link this ride with Forrest but that should not be seen as an essential priority in terms of design. The rationale for this option is that it would:

- » showcase the Surf Coast, Great Ocean Road and Great Otway National Park landscapes
- » be the first coastal forest Epic Ride in Australia
- » become a 'must do' ride for intra and interstate riders and could draw riders from New Zealand and other international destinations
- » connect the communities of Lorne and Apollo Bay and create business opportunities in food and beverage, accommodation and transportation.

### **Actions**

- 1. Develop the Twelve Apostles Trail as BSW's premier overnight point-to-point trail ride.
- 2. Assess the investment requirements for the You Yangs and Forrest hubs to gain international/ national recognition as mountain bike destinations. This should include the requirements needed to attain IMBA status:
  - 2.1 Aim to significantly extend and improve the trail networks by 2025 to become competitive with international destinations such as New Zealand.
  - 2.2 Undertake a feasibility study for establishing an IMBA Epic Trail connecting Torquay, Lorne, Forrest and Apollo Bay. Due to limited funding available in the region, any development ought to depend on progress being achieved with the Twelve Apostles Trail, You Yangs and Forrest expansions.
  - 2.3 Assess practical options to make the Surf Coast Walk dual use along its entire length.



## Strategy 4: Continue to invest in the Region's Cycle Trail Network

### What is the issue?

A network of cycling and walking trails has emerged since the *BSW Regional Trails Masterplan 2009* was prepared. These are listed below. Each trail has been assessed in terms of its strategic role for cycle tourism and walking. While in the same region, these trails are managed separately by their respective land management agencies, local councils, nearby community and sports organisations. While they are not necessarily viewed as a network, they collectively function as a network at a regional level.

TRAIL	BSW ADVENTURE TOURISM TRAIL CATEGORY
Great Ocean Walk	Leading (walk)
Surf Coast Walk	Leading (walk and bike)
Twelve Apostles	Proposed Leading (bike and walk)
Grampians Peaks Trail	Proposed Leading (walk)
You Yangs MTB Hub	Leading hub (bike)
Forrest MTB Hub	Leading hub (bike)
Anglesea MTB trail network	Support hub (bike)
Great South West Walk	Support (shorter 3 Bays-3 Days section could become Leading) (walk)
Bellarine Rail Trail	Support (bike and walk)
Geelong Waterfront	Support (bike and walk)
Barwon Heads and Parklands	Support (bike and walk)
Old Beechy Rail Trail	Support (bike and walk)
Port Fairy to Warrnambool Rail Trail	Support (bike and walk)
Warrnambool Foreshore	Support (bike and walk)
Glenelg River Trail	Support (kayak)

The network now consists of urban through to backcountry cycling opportunities. By managing these trails as part of a regional network, it now presents the opportunity to implement a range of actions that will enhance the visitor experience. This in turn will help to achieve the vision for BSW's trails.

The development of the industry's capacity to be 'cycle- friendly' and the development of quality new cycle tourism product go hand in hand. By providing cycle tourism awareness and accreditation programs to business, identifying product gaps and by supporting growth in those gaps where possible the region will substantially enhance its product offering so stimulating customer satisfaction, further demand and economic benefit.

### **Actions**

### 1. Funding

**1.1** Prioritise funding for the region's cycle trail network based on the strategic role each trail or hub plays in terms of tourism, economic development, recreation, fitness, health and road safety.

## 2. Signs, Maps and Information

2.1 Provide more consistent trail maps and brochures for existing cycle trails that clearly indicate directions to trailheads, trail access points, length of trails, average time to complete, terrain/profile, technical difficulty, support services (food, water, toilets, parking, mobile phone coverage).

## 3. Trail Development and Maintenance

3.1 Management of BSW's cycle trail network should be consistent with this strategy and have regard to the BSW Trails Management and Infrastructure Guidelines and IMBA trail standards.

## 4. Industry Development

- **4.1** Attract visiting journalists to events and new trail developments to help build the profile of the region.
- **4.2** Deliver a series of cycle friendly workshops for businesses and communities that will be a focus for trail infrastructure developments (for instance at Forrest, Camperdown, Port Campbell, Lara).
- **4.3** Undertake periodic targeted market research and modelling of the economic benefits of cycle trails across the region.
- **4.4** Support existing and new tour providers to develop, expand and promote their product in the region.

### 5. Events

**5.1** Support events that will strengthen the profile and economic benefits associated with BSW's cycle trails.

### 6. Rider Behaviour and Education

- **6.1** Provide wash down stations at locations known to *contain Phytophthora cinnamomi* or significant weed problems to minimise the spread to other riding areas.
- **6.2** Through interpretation and education encourage adoption of IMBA 'rules of the trail', 'Leave No Trace' and other minimal impact principles by mountain bike riders, clubs, tour operators and trail advocates.



## **Implementation – Priority actions**

To ensure that the actions contained in this strategy are realistically delivered and the opportunities for growth in cycle tourism benefit not only the tourism industry but also region's local economies and communities as a whole, a small number of important strategic management initiatives will be undertaken to oversee the Action Plan's rollout.

Multiple agencies and organisations are involved in cycle tourism in BSW region. These include state agencies, local councils, peak bodies, cycling clubs, tourism and transport operators and community trail organisations.

Effective collaboration amongst these stakeholders will be the best way for the region to become Victoria's premier trail destination. Collaboration on trails was evident during preparation of this strategy at a number of levels – between state agencies and between state agencies and cycling groups; with councils and state agencies and between community trail organisations and councils. Most trails in the region have at least one land management agency, cycle group, local businesses and a community organisation associated with them. This shares responsibility for trail development and maintenance and can leverage funds for the expansion of trail networks.

The case studies presented in the following section illustrate the power of collaboration for trail development and maintenance.

Implementation of this strategy is based on the assumption that collaboration will continue and improve. In particular:

1. A BSW Cycle Tourism Coordinating Committee (BSWCTCC) should be established in order to (i) facilitate delivery of this cycle tourism strategy and (ii) provide leadership and advocacy that will leverage funding and other support needed to achieve the vision. This can be an informal group to begin with. It may evolve into a more formal organisation, potentially attached to the governance body put in place for trail development across the region, if there are strategic advantages, particularly in leveraging funds. It is envisaged that the BSWCTCC would have highly skilled members drawn from the road and off-road cycling community, land managers, Regional Tourism Boards and relevant state agencies.

- 2. A regular flow of communication and information should flow amongst stakeholders. This could be achieved by one integrated website, linked blogs and an annual regional cycle tourism trails forum to share progress on this strategy, provide inspiration from visiting speakers or field visits, provide feedback from local research and monitoring of BSW's cycle tourism markets, and address issues and opportunities as they arise. One of the first actions should be to set up more consistent systems for monitoring the use of cycle trails and cycle touring routes and for surveying cycle tourists in terms of their experience of BSW's trails.
- 3. Ultimately, each trail and cycle touring route in the region is the responsibility of at least one lead agency. This means that individual organisations will continue to drive what happens on the ground. The Victorian Government provides funding to support cycling through a range of programs such as the Community Facilities Funding Program, the Community Works Program and the Regional Growth Fund. These funds are examples of the Victorian Government's aim to treat cycling as a mainstream activity in funding programs. The resources required to implement the actions within this plan will require further assessment on a case by case basis. Resources should be leveraged by the BSWCTCC from budgetary allocation processes managed by the key lead agencies and other stakeholders who would benefit from development of cycle tourism in the region.

The summary table of strategies and actions has been prepared on these working assumptions.

**Table 7 Summary of Strategy and Actions** 

SUMMARY OF STRATEGY AND ACTIONS	LEAD	PARTNERS	PRIORITY	FUNDING
1. Highly visible road touring routes				
Endorse and promote new touring routes to intra and interstate markets	BSWCTCC	Regional Tourism Boards, Tourism Victoria, Councils	2015 - 2020	Annual operating
Provide consistent online cycle touring information via the region's main tourism promotional websites	Regional Tourism Boards	Tourism Victoria	2015 - 2020	Annual operating
Develop a touring route sign system for riders that links with online cycling information	Vic Roads	Regional Tourism Boards, BSW Regional Trails Working Group, Councils	2016 - 2018	Annual operating
Advocate for and collaborate with local businesses for BSW to become a Bike Friendly Region with a focus on the main touring routes	BSWCTCC	Local businesses associated with touring routes, BSW Councils, Chambers of Commerce, cycling clubs, Cycling Victoria	2015 - 2020	Annual operating from multiple agencies
2. Safer roads				
Better traffic warning signs, passing lanes and shoulders along the region's main road touring, training and event routes	Vic Roads	Bike Safe, cycling clubs, BSW Regional Trails Working Group, Councils	2015 - 2016	Annual operating
Recognition of BSW road touring routes via a Principle Bike Network for BSW region	Vic Roads	Bike Safe, BSW Regional Trails Working Group, Councils	2015 - 2016	Annual operating

SUMMARY OF STRATEGY AND ACTIONS	LEAD	PARTNERS	PRIORITY	FUNDING
3. Establish three International / National cycle trail ex	periences by 2025			
Develop the Twelve Apostles Trail as BSW's premier overnight point-to-point trail ride	Corangamite Shire	Twelve Apostles Trail Trust, local businesses along the trail	2016 - 2018	Joint council, state and federal grants
Assess the investment requirements for the You Yangs and Forrest hubs to gain International/National recognition as mountain bike destinations. Aim to significantly extend the trail networks by 2025	Parks Victoria and DELWP	Geelong MTB Club, You Yangs MTB Inc, IMBA, cycle and event businesses associated with Forrest and You Yangs	2015 - 2016	State or Federal grants
Undertake a feasibility study for establishing an IMBA Epic Trail connecting Torquay, Lorne, Forrest and Apollo Bay	BSWCTCC	Colac Otway Shire, RDV, Parks Victoria, Surf Coast Trail Group, Geelong MTB Club, Surf Coast Shire, DELWP, Forrest MTB Club	2015 - 2016	Multi-agency funding, grants
Assess options to make the Surf Coast Walk dual use	Surf Coast Shire	Surf Coast Trail Group, GORCC, Parks Victoria and DELWP	2015 - 2016	Annual operating
4. Continue to invest in the Region's Cycle Trail Netwo	rk			
Funding	BSWCTCC	Councils, Parks Victoria, DELWP	2017 - 2020	Mixed annual operating, state and federal grants, user fees, sponsorship
Signs, Maps and Information	BSWCTCC	BSW cycling groups, cycle tour operators, visitor centres, Councils	2017 - 2020	Annual operating plus State or Federal grants, sponsorship
Trail Development and Maintenance	BSWCTCC	Councils, Parks Victoria, DELWP	2018 - 2022	Capital bids, annual operating, state and federal grants
Industry Development	RDV	Regional Tourism Boards	2016 - 2020	Annual operating, one-off grants
Rider Behaviour	BSWCTCC	BSW mountain biking groups, Peak Bodies	2016 - 2020	Annual operating, one-off grants

## **Case studies**

## Whistler Trails Network, BC, Canada



Whistler is located in British Columbia on Canada's west coast. Mountain biking began to emerge during the 1990s, with riding and trail building developed organically in an unstructured and unplanned manner. Whistler started to gain recognition as a mountain bike destination in the early 2000s. Vancouver was already on the mountain biking radar with the Northshore of Vancouver creating a new genre of riding (e.g. free riding) and trails (e.g. Northshore style). Whistler Blackcomb in the late 1990s began experimenting with lift-accessed mountain bike riding on the ski slopes. They invested heavily with little return initially. However, over a relatively short period of time they created a market for ski-lift accessed biking and a new style of trail design (e.g. the famous A-line) and by 2008 were attracting 100,000 biker visits to the park.

At the same time as the resort was building the Bike Park product, the Resort Municipality of Whistler was developing other infrastructure such as the paved Valley Trail and Lost Lakes Trails that complemented the park's riding options. The municipality, with the assistance of the Whistler Off Road Cycling Association (WORCA), also started to develop new routes such as Comfortably Numb (photo opposite) and improve and maintain select trails in the valley.

Over the last decade Whistler has worked hard to develop its summer product and mountain biking has been the cornerstone of this. Summer visitation now exceeds winter visits and mountain biking has surpassed golf as the key driver for room nights in the resort over the summer months.

#### The Trails

Today Whistler offers a complete mountain bike experience, from the paved three metre wide 40 km Valley Trail, to the Lost Lake Cross Country trails both suitable for families and novices. It also offers all mountain epics like the technically demanding Comfortably Numb (23 km) and the 100km of lift accessed trails in the Whistler Bike Park.

Whistler businesses have also adapted and capitalised on mountain biking and now cater to bikers by providing bike friendly amenities such as bike stands, bike washes, rentals, guiding services, secure storage and holiday packages.

Whistler has not only planned for mountain bike tourism, but also recreation and commuter cycling to ensure that the benefits of cycling infrastructure can also benefit local residents.

The Resort Municipality of Whistler published the Whistler Trail Standards in 2002, which were designed to review, sign, maintain and manage the network of trails that had developed (some illegally) throughout the Whistler Valley. The document was not a "how-to" on building or maintaining trails, but rather a standard by which the trails would be managed.

### The Market

The summer market in Whistler has evolved significantly over the last decade. In early 2000 Whistler's summer visitor numbers exceeded their winter numbers for the first time and the resort now views summer as the growth area as skier visits remain relatively flat. In 2009, Whistler received 814,000 winter visitors and 1,300,000 summer visitors.

Since 2000 mountain biking has contributed significantly to driving summer visitation, some are calling mountain biking "the new golf". The Whistler Bike Park attracts 63% of riders from outside Canada, with 89% of non-resident riders staying overnight. The average stay is 5 nights and 80% of Bike Park riders were motivated to travel to Whistler for riding.

### Trail maintenance

Outside the Whistler Bike Park, managed by Whistler Blackcomb Resort, the trails are maintained by the Resort Municipality of Whistler in partnership with the Whistler Off Road Cycling Association (WORCA). WORCA, with over 1,000 members represents over 10% of the town's permanent population. The trails are maintained with regular volunteer days (well attended) and evenings throughout the season, and by hiring a contractor with member fees and grants. Special grants also enable large scale trail projects with a variety of different partners.

### **Economic Benefits**

The economic benefits for mountain biking in Whistler are driven by the Whistler Bike Park, which contributes C\$16.5 million in non-resident expenditures. However, the trails on municipal land in the valley, managed and maintained by the municipality and WORCA, contribute an additional C\$6.6 million to the local economy. In addition to the trails, events like Crankworx also serve as a key catalyst for tourism and economic development. The 2006 event attracted 55,000 unique visitors, of whom more than 23,000 travelled solely to attend the festival and added a further C\$11.5 million in non-resident expenditures.

### Management

Whistler is an excellent example of collaborative management of the trail network. The key players include Whistler Blackcomb Resort, the Resort Municipality of Whistler, WORCA and a host of local and regional businesses. The municipality has taken a leadership role in recognising the value of mountain bike trails and subsequently putting the systems in place to plan for their ongoing maintenance and management.

The Whistler Cycling Committee was established to address the biking-related challenges and opportunities faced by the resort. It is comprised of three key working level groups:

- 1. Trails Planning
- 2. Tourism & Services
- 3. Transportation

Plans have been developed for each sector and the groups continue to work on various initiatives to enhance the biking experience for residents and visitors alike. One of the keys to a successful committee is developing a clear and concise Terms of Reference for the participants.

Sources: First hand knowledge of Whistler supplemented with Internet research, Tourism Whistler, Mountain Bike Tourism (Tourism BC, 2008). \$1.00 CAD = \$1.00 AUD 31/5/12.

## Rotorua - New Zealand's Spiritual Home of Mountain Biking



## **Background**

The Whakarewarewa Forest, located on the edge of Rotorua township, was designated a forest park in 1975. The forest has since become the recreational hub of the community. Numerous groups including walkers, runners, mountain bikers, horse riders, dog walkers, and picnickers now use the forest.

The growing number of events in the forest has significantly increased the cycling visitor numbers to Rotorua. The 2006 UCI World Mountain Bike Championships served as a catalyst and affirmed Rotorua's reputation as a world-class mountain bike destination. This has also lead to the growth of bike related businesses in the town.

However, Rotorua's success can also be attributed to the fact that it was already an established tourism destination with a wealth of other activities available to visitors. This gives it a broad appeal to a large market. It is also well located in the centre of the North Island.

### The Trails

The trails are compressed into around 50 hectares of forest and cater to everyone - from beginners and family groups through to the experts. They are generally pretty mellow, but have enough challenge if riders increase their speed to keep expert class riders coming back.

Riders can put together a 2.5 hour ride without any repeated sections, while never getting further than about 2 kms in a straight line from the trailhead. Even when the carpark is full, the mainly one-way system keeps the forest from feeling crowded.

#### The Market

Mountain biking accounted for 85,000 of the 282,000 recreational visits to the Whakarewarewa Forest in 2007. Just over half of all mountain bikers in the forest are visitors, 48% domestic and 3% international visitors. Over half (54%) of bikers in a recent survey came to Rotorua specifically to go mountain biking.

Rotorua also maintains an excellent one stop website that has all the information riders need for a visit to the trails (http://www.riderotorua.com).

### **Economic Impact**

Overall, mountain bike-related spending in Rotorua was estimated to be around \$7.4 million in 2007. Visitors to the region account for 35% or \$2.6 million.

The biking trails in Rotorua have created opportunities for businesses to capitalise on this growing market segment. The town now has seven full service bike shops, three of which also hire bikes, as well as a bike shop located at Whakarewarewa Forest. Several accommodation properties cater predominately to mountain bikers and there are guiding and bike shuttle companies operating on a full time basis.

Southstar Adventures runs a mountain bike shuttle service for bikers in the forest. The business has grown from one bus to three since 2006. The company now has an hourly rider capacity of 180 and undertakes over 20,000 rider trips annually.



### Trail maintenance

The costs of building and maintaining the Whakarewarewa Forest trails are informally shared by the Rotorua Mountain Bike Club's (Inc) volunteer efforts, charitable trust funding to pay contracted part-time trail-builders, the Department of Corrections who organizes Periodic Detention work crews and Rotorua District Council.

### Management

The Forest is managed by Kaingaroa Timberlands on Crown Forest Licence land. On July 1, 2009 ownership of the forest was transferred to the Central North Island Iwi Collective. There is a legal right of access for recreational activities but forestry management goes well beyond this to make the Redwoods a great place to ride. The Visitor Centre is managed by the Rotorua District Council.

Sources: First hand knowledge of Rotorua, http://www.riderotorua.com, Recreational Use and Economic Impact of Whakarewarewa Forest: 2009 Update. Rotorua District Council/Apr 2009

## Melrose, South Australia - an emerging MTB destination



## **Background**

Bike South Australia was looking for areas to develop more singletrack, in conjunction with Troy Rerrick (OTE Sports, Fruita, USA) who was contracted to them on mountain bike development. Both the Melrose and the Mawson area were identified as potential areas.

Richard Bruce moved to Melrose in 2006 to manage the Northstar Hotel. In 2008 he met Troy Rerrick and by chance decided to set up OTE Sports Melrose with Troy's help in a vacant shop in town. Melrose is a small country town with a population of 200, located in the Flinders Ranges approximately 270km north of Adelaide. At the same time the shop was established they also won the contract to build the Melrose trails, which helped keep the business afloat until it was more established.

In 2008 the town was in decline with property values falling. The shop and the development of mountain biking in the area have turned the town's economy around.

### The Trails

The network started with the concept of building the types of trails that the team at OTE Sports liked to ride. As their riding has progressed, so has their trail development. The trails continue to evolve and now include features such as berms, small jumps and rollers. Getting the gradient right is also critical so riders also have a good experience on uphill sections and maintenance costs are minimised.

They have realised that easy riding opportunities are very important, as many people just want to enjoy riding off-road and the landscape, but are not keen on riding technical singletrack. They have also provided riding opportunities for families and children with the development of a rail trail, which has been very popular with users.

A network of ten kilometres is considered a good starting point, however that is not enough to hold riders attention for long and will not encourage repeat visitation. Melrose now has approximately 75 kms of trails that can keep riders occupied for 1 to 2 weekends a year, making it an attractive weekend and overnight destination. Riders are also constantly looking for new trails or new features/sections, so planning and staging of trail development can be important.

### The Market

Melrose has a small local ridership with an increasing number of youth and women becoming interested in riding. Melrose also has regular weekly visits from riders in nearby (within 1 hours drive) towns. Melrose also attracts riders from further afield with the majority from Adelaide, then Victoria, Queensland, NSW followed by Western Australia.

OTE Sports believes the Australia mountain bike market is still maturing and in some respects is quite race orientated. Many of them, particularly racers, do not spend a lot of dollars in communities.

Melrose aims to provide a more accessible riding experience that caters to a broader market segment including novices, families and older riders. It is about fun and the social aspect of biking. Melrose events reflect this focus with an emphasis on festivals as opposed to attracting national mountain bike races. The key Melrose target market is riders over 30 years old who generally have more time and money to spend.

### **Trail maintenance**

The current situation is quite dependent on the OTE Shop, largely because of their leading role in creating the trails. There is a mountain bike club in town that is now in charge of maintaining trails, which was set up by the shop, but there is still a lot of crossover between the two entities.

The challenge within the community is to create a feeling of ownership for the trails. While there are usually high levels of enthusiasm for building new trails, this is not replicated for maintaining trails. So while there is acknowledgement that the trails provide benefits for the community, dealing with the ongoing maintenance of trails can still be a challenge.

The South Australian Tourism Commission provided the initial grant over three years to the Southern Flinders Ranges Development board for the development of the Melrose trails.

Since the initial funding there has only been limited dollars from the local council. The club and bike shop organise weekly Saturday morning building sessions to try and encourage regular trail maintenance. Recreation and Sport South Australia have encouraged Melrose to bid for grants but to date they have been unsuccessful.

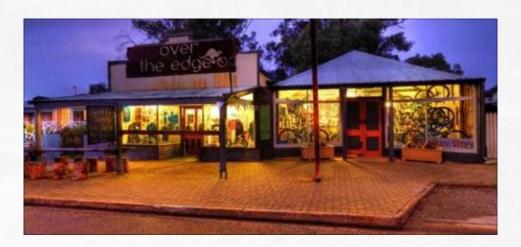
### Management

The Melrose trail network is located on private land. The land owners are not keen to allow any further trails to be built on their property. There are more opportunities to expand the network at Bartagunyah but the land is located 4 kms out of town.

Mount Remarkable National Park is located adjacent to the township, but mountain biking is not currently permitted.

Insurance is provided through a mixture of property owners (at Bartagunyah) and through South Australia Recreation and Sport (Melrose).

Sources: Internet research, knowledge of OTE Sports Fruita history and May 2012 interview with Richard Bruce, OTE Sports Melrose.



## Mt Buller, Victoria



## **Background**

Mountain biking has been happening on Mount Buller (which is a ski resort area) since the 1990s. It started out in an ad-hoc manner with no formal trails. The network developed and expanding year on year, with a particular focus on downhill trails. Over the 2002/2003 summer the trails were closed by resort management (the Council) due to environmental issues caused by mountain biking.

Talks started around this time on developing a formal, directed plan for mountain biking in the area. This was also influenced by the 2020 Strategy for Mount Buller which pushes for the area to be a year-round destination. World Trails was employed over 2004 and 2005 to create a master plan for mountain biking in the resort. Trail building began in 2006/2007. This was supported by a grant from Regional Development Victoria. Trail building in the resort is limited to a short season between December and April for environmental reasons.

### The Trails

Buller Ski Lifts builds and maintains the downhill trails on the mountain. The resort (Mount Buller) builds and maintains the cross country trails. There is a wide variation of trails in the area, ranging from easy to very difficult and catering for all abilities. The majority of trails are aimed at intermediate riders.

The resort's strategy for staging trail development was to start with intermediate trails and then build beginner trails followed by harder, more technical trails. They have now switched their focus back to easier trails to cater for the beginner/family experience. They aim to have the easier trails as the most accessible/closest to town and the more difficult trails further out, but accessed via the beginner/intermediate trail network.

Their goal was to have enough trails in the region so that they could not all be ridden in one day. Tourists would then have to stay the night and continue riding the next day. They suggest that the tipping point is approximately 30 kms of trails.

They have also developed a new trail called Copperhead, which they believe is a new type of trail called a "flow down". It can be ridden on a downhill or cross-country (XC) bike. It is generally suitable for a beginner downhill rider or intermediate XC rider, but riders of all levels can enjoy different features.

### The Market

Ten percent of the market is downhill riders. The rest is made up of cross-country riders with varying abilities. The biggest proportion of the market is middle age professionals who are looking for an adventure experience (similar to the downhill ski/snowboard market). These types of riders generally fall in the intermediate category. The resort aims to cater for all visiting tourists and would not invest solely in one area and certainly not only for downhill riding.

Approximately 70% of their market is made up of interstate tourists. Interest is generated predominately by word of mouth. They have experienced an 18.5% increase in visitors this year compared to last year for mountain biking.

### Management

The resort believes that land managers in Australia need to be proactive in providing managed mountain biking opportunities as mountain bikers are here and they will create their own opportunities if they are not provided for them. Unmanaged networks can create problems for a community, as experienced in Mt Buller over the 2002/2003 summer.

The downhill trails do not make enough money on their own to pay for the mountain operation costs. However, the lifts are open for sightseeing in summer and the chairlift access for downhillers ties in well with this. Lift access has to be affordable, which limits the opportunity with downhill mountain biking as the market is simply not big enough.

### **Economic benefits**

The economic benefits of mountain biking for the region have not been large. However, mountain biking is helping with the year-round sustainability of Mt Buller village and has meant that a few businesses, which previously only opened over the winter, are now open year round.

The returns are there for private investors but the costs (for cross-country tracks, maintenance, marketing) are the responsibility of resort management (the Council). The economic situation has improved slightly over summer since a mountain bike master plan was put in place, with some businesses now reporting days in summer that are as busy as the winter season. The community buy-in has been slow but it is slowly growing.

## Signage

Signage is very important. It does not need to be fancy, just simple and in the right locations. Signage is being updated to fill gaps identified by users. Signage is prioritised on the basis that the further out you get in a network the less signage you need, as it is assumed that only more experienced riders will use the outer trails.

Sources: Internet research, local knowledge of Mt Buller and June 2012 interview with Lou Perrin, Mt Buller Resort.

